SmartPartner Software
2013 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.

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Horizon Software
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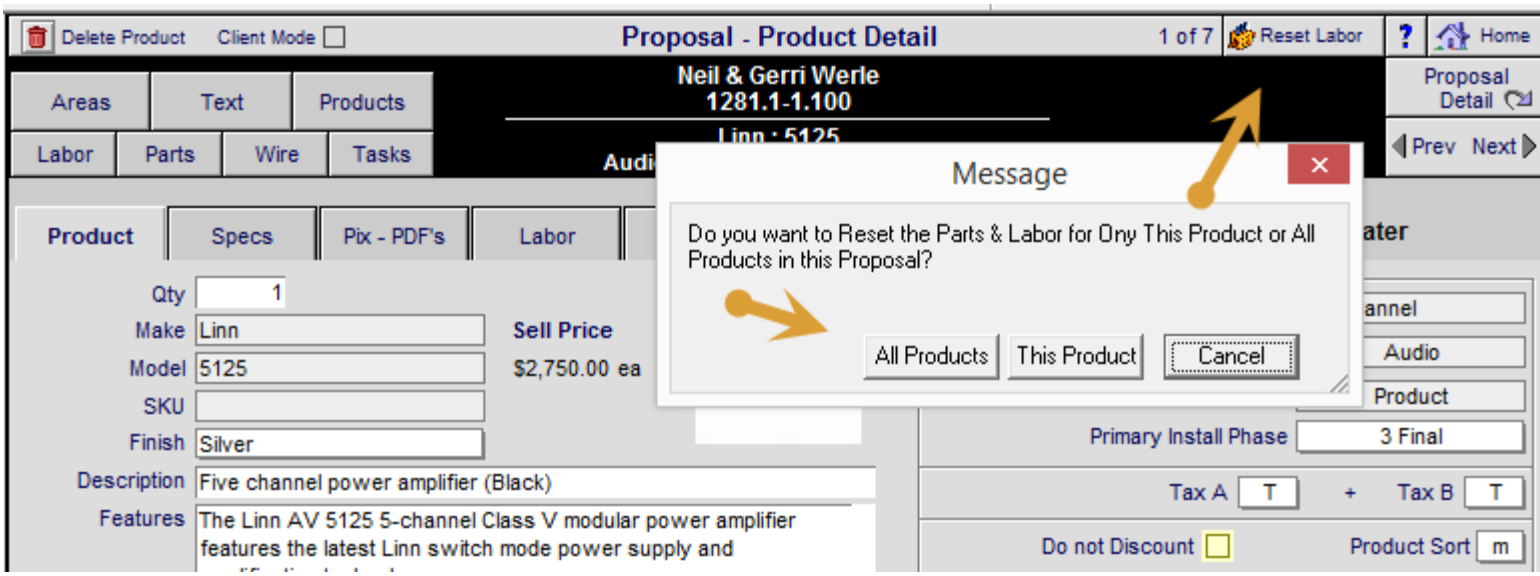
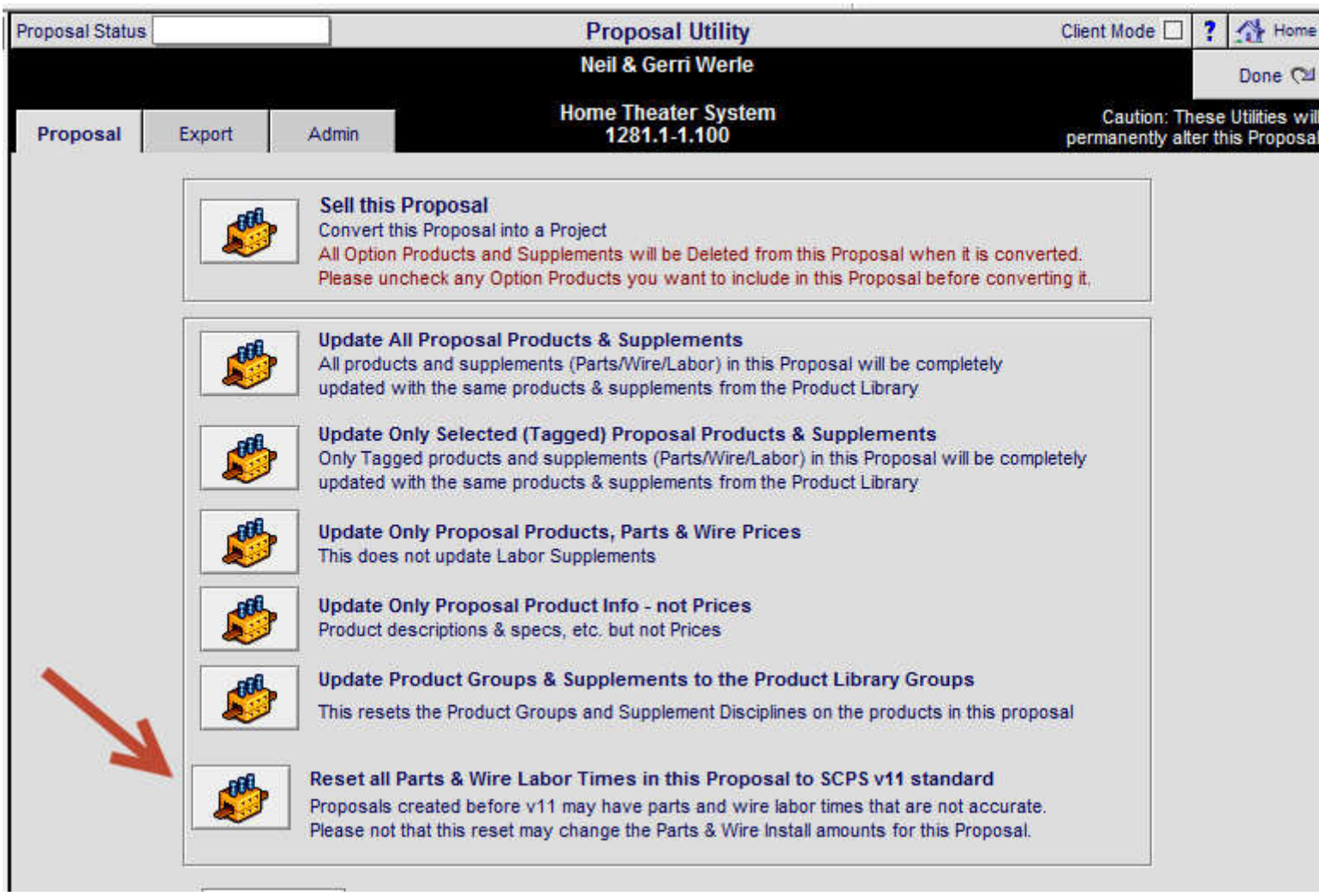
SCPS Version 11.0v1

Released: 12/12/2013

Enhancement - Proposal/Product Detail & Proposal Utility screens: Reset Parts & Wire Labor time to SCPS v11 standards

SCPS v11 uses a new Labor posting routine to ensure Parts & Wire Labor Time accuracy and any new products you add to a Proposal or Pending Change Order will be accurate. However, if you have existing proposals with products added before SCPS v11, you can update the entire Proposal or just a single product with these Utilities.





Enhancement – New POS Service Ticket Module

This new POS Service Ticket Module enables you to create, print and manage Service Tickets created from Project WorkOrders or from the POS or Contact modules. There are sections to track Ticket Status, Install Time, Appointments and eMail notifications. This module has been sponsored by AVIR one of our SmartPartners.

Print Setup | Delete Ticket | **POS - Project Service Ticket** | Home

Print | Hide Labor Detail Matrix | Preview

Project Service Ticket
PT #7205

Ticket Done | Contact | Leave | Set Up | Prev | Next

Burkes
Sunbelt Business Brokers
567 58TH Street
Oakland, CA 94607
kelly@burke.to

Home 831-659-8595
Work: 831-624-5600
Kelly's 831-457-9838
Mobile 831-601-8337
Office Fax 831-624-3880

Job Contact
Job Location
Job Phone
Project #
Salesman: Jim Engandela

Contact Notes (Does not Print)
Internet=results@sirius.com
Applelink=result.usa eWorld=results
FEDEX #1676-5079-1
mike@adouvinc.com

Service Tickets
Ticket Type: New
Ticket Status: Pending Scheduling
Billing Status: New

Assignements
Tech: JE
Prev Tech: LB
Project Mgr: MR

Appt Requested
Date: 12/11/2013
Time: 6:30 AM

Ticket Appointment
Date: 12/23/2013 Time: 2:30 PM

Issue Master Tracker Event
Requested Installer: SR
Add | Edit
Appointment: 12/10/2013 12:00 PM

Warranty & Install Date
Warranty Status: No Warranty
Warranty Date:

Ticket Creation
By: Jim Engandela
Date: 12/10/2013

Labor Tracking
Allocated Hrs: 15:00
Used Hrs: 14:15
Remaining Hrs: 0:45

eMail Notification
All
Notify Scheduling
Notify Engineering
Notify Sales
Notify Specific

Description of Word Requested
Add a digital music streamer to the home theater system

Item Notes *(Does not Print)*
Watch out for the dog..he bites

Description of Work Completed
Successfully Installed Streamer and tuned up system.

Additional Work Requested Yes No
Yes Would like a Movie Streamer too.

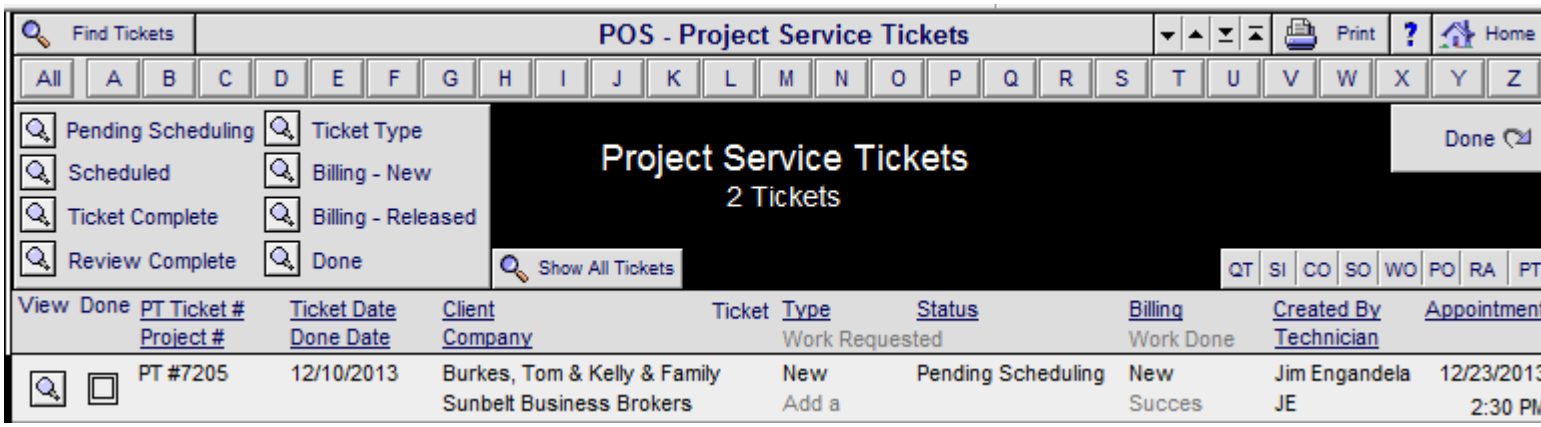
Technical Services

Technician	Start Time	End Time	- Lunch	Tech Total	Travel	Grand Total	Work Code	Description
Fred Joens	8:00 AM	3:00 PM	1:00	6:00	1:00	7:00	PRG	
John Smith	9:30 AM	4:00 PM	0:45	5:45		5:45	PRG	
				11:45	1:00 =	**12:45** Hrs		

Products, Parts & Materials

Pick	Qty	unit	Price Cue	Make - Model - Description (max 2 lines)	Labor (h:m:s)	Unit Price	Ext Price	Tax A	Tax B
	1	ea		Crestron : AADS : Adagio Audio Distribution System : Black	1:30:00	2500.00	2,500.00	T	T

The POS Project Service Ticket List view enables you to see at a glance many of the ticket details and the Find Ticket module is specially geared for Project Tickets.



You can create new Project Service Tickets or View them from the POS screen, the Project Work Order screen or the Project Work Order Invoice screen.

Point of Sale - View POS

Utilities | ? | Home | Leave

EME audio & video

User: Jim Engandela
Location: 1 - EME Audio & Video Systems

Add a New POS

View
POS Invoices

Quotations | Work Orders

Sales Invoices | Service Orders Repair & OnSite with RMAs

Change Orders | Purchase Orders

Credit Meno's | Product Return Authorization

View
Project Service Tickets

***Unassigned Project** Service Tickets can be created here or for a **Specific Project**, from the Work Order screen, in a Project*

Service Tickets | Show All | Phase 1 | 2 | 3 | Install Work Orders - All - 3 Products | PO | WO | SI | ? | Home

WO Area Notes | Wire Manager | LeRoy Asher | 1295.1-1.100 | Labor Time Remaining on Project | Totals | Left To Install | Left to Complete | Create WO | Leave

Project Time 46:13:30 | Products 0 | 4

WO Products | WO Parts | WO Wire | Sum | P | Auto Set Qty to Issue | View Work Orders

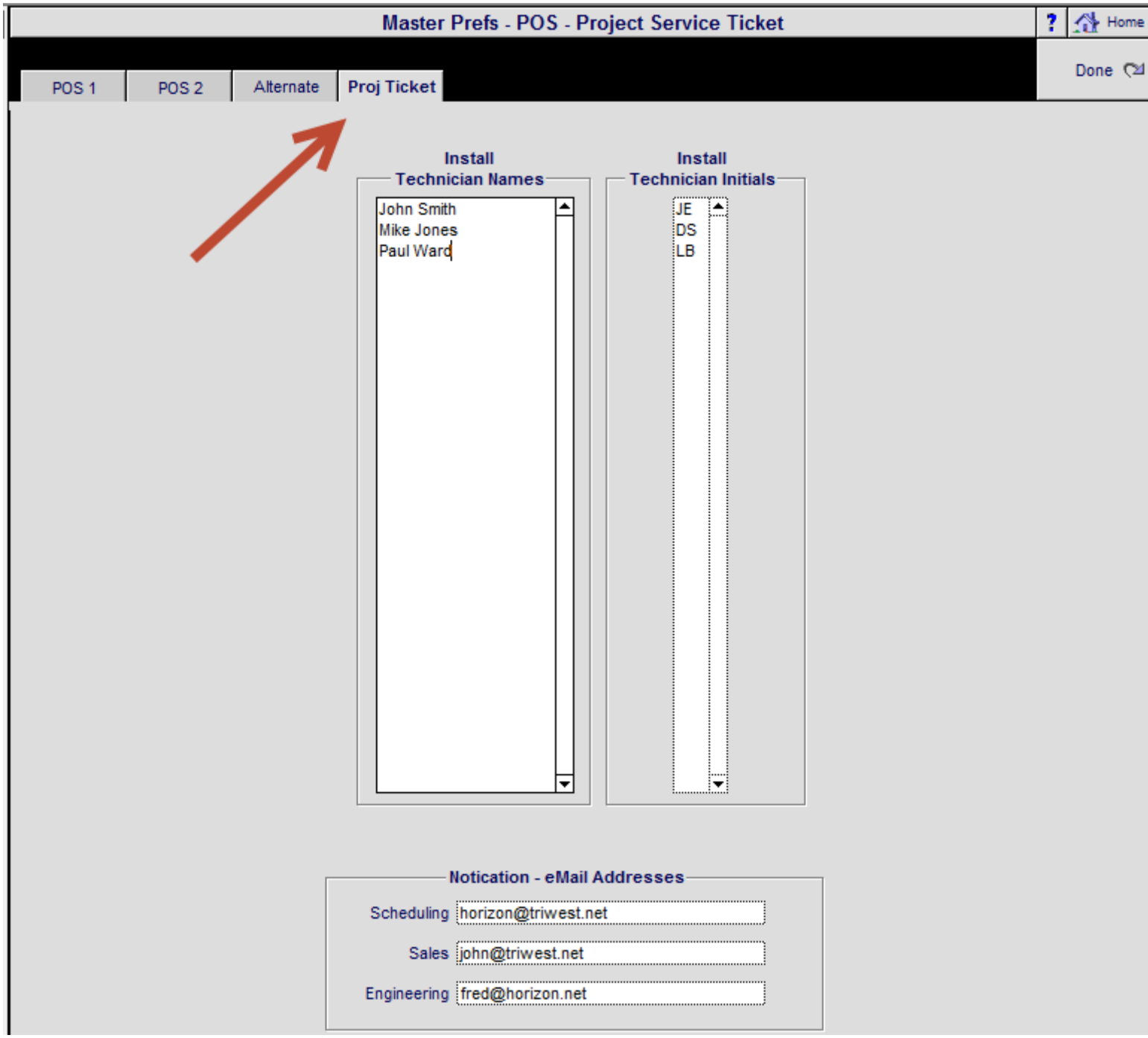
Phase	Zone - Area / Discipline	Qty Sold / Delivered	CO#	Make / Insta			WO's to Date: Qty Installed	Total Time / Avg Time	Left to Install	Left to Complete
2	Atrium / Audio	1 ea		Linn / Univ					0	1
2	Balcony / Audio	2 ea		Linn / Univ					0	2
2	Computer Room / Audio	1 ea		Linn : 5101 Personal Handset / Universal learning remote	Black	1			0	1

Message

Do you want to Add a new Service Ticket or View Existing WOS Ticket for this Project?

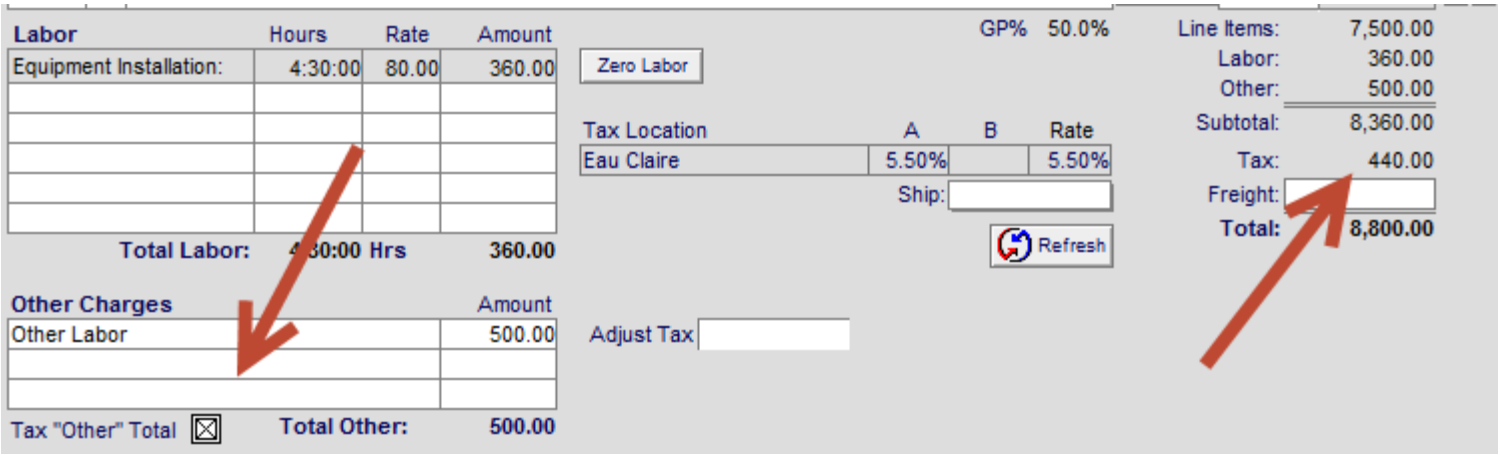
View | Add | Cancel

There is a Preferences screen specifically for Project Service Tickets in the Master Preferences/POS/Proj Ticket screen.



Enhancement - POS Invoices: Tax Other Labor

You can now choose to Tax the Other Charges on POS Invoices by clicking on the Tax "Other" Total checkbox.



Enhancement - POS/Quotations & Invoices: Tighten Product Lines

The amount of space between each product has been tightened up a bit to allow for more products on a page and to help the page breaks from clipping product lines.

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

QUOTATION
QT #6427
3/31/2005

Lewis Steinberg 94 Forest Heights Blvd. Toronto, ON M2L 2K8 Canada	Home: 416-441-5751 Fax: 416-441-3346
Lewis Steinberg Lot 5 Country Lane Toronto, ONT	

Ship VIA	Payment	Terms	Reference #	Sales Rep
	Cheque	40 % deposit, balance upon delivery		Robert Campol

Qty		Description	Price	Total
5	ea	Vantage : CIS : Contact closure input station 10 inputs	625.73	3,128.63
8	ea	Vantage : FAN-CAP : Capacitor for use with ceiling fans	51.09	408.70
157	ea	Vantage : *FPTP1-P-WH : Plastic faceplate trimline 1 gang	52.74	8,279.55
5	ea	Vantage : *IPE1000 : Ip enabler	393.27	1,966.36
157	ea	Vantage : *KS12B BLUE : 8 button blue led lighting keypad	240.33	37,732.33
10	ea	Vantage : *LVRS : Low voltage relay station	741.60	7,416.00
5	ea	Vantage : *MC : Master controller	1,726.54	8,632.69
51	ea	Vantage : MDS8RW101 : Fused SCR Dimming Module	1,332.56	67,960.69
5	ea	Vantage : *MPER-4 : Master power enclosure recessed 4 module	1,505.52	7,527.58
11	ea	Vantage : Q-MANUAL : Manual override	125.66	1,382.26
5	ea	Vantage : *Q-RS232S : 232 station	375.44	1,877.18
50	ea	Vantage : QJUMPER : Test & temporary power jumper board	32.96	1,648.00
10	ea	Vantage : SPES-4 : Slave power enclosure surface 4 module	1,928.16	19,281.60
1			-9,599.00	-9,599.00

Labor	Hours	Rate	Amount
Equipment Installation:	0:00:00	90.00	0.00
Total Labor:	**0:00:00 Hrs**		**0.00**

Line Items:	157,642.57
Labor:	0.00
Other:	
Subtotal:	157,642.57
Tax:	0.00
Freight:	
Total:	**157,642.57**

Other Charges	Amount
Total Other:	

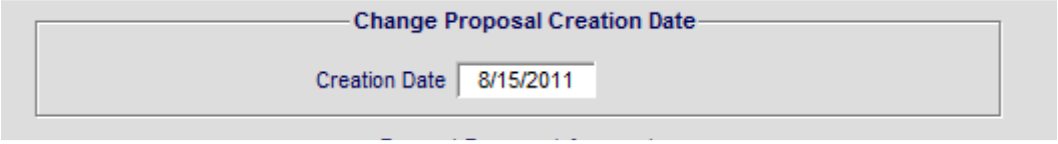
Acceptance Signature: _____ Date: _____

Enhancement - POS Invoices: Return to Contact from any POS Invoice.

When leaving any POS invoice instead of clicking the Done button which returns you to the POS Invoice list you can now click on the Contact button and return to the Contact module for that Contact.

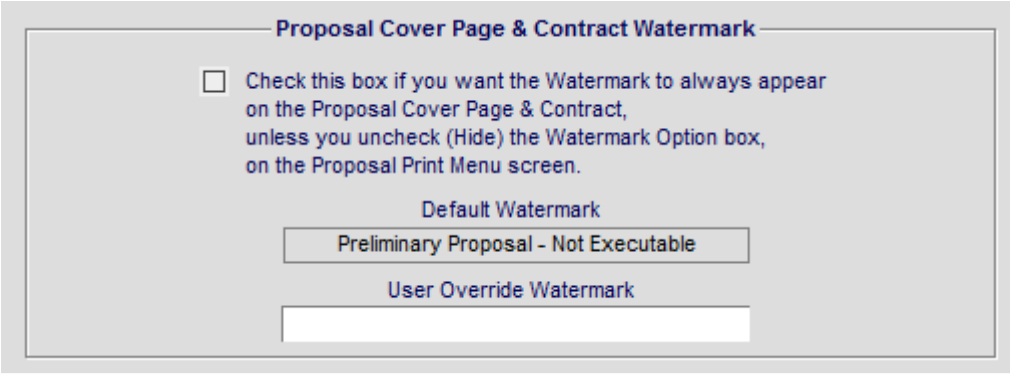
Enhancement - Proposal/Utility/Administration: Change Proposal Creation Date

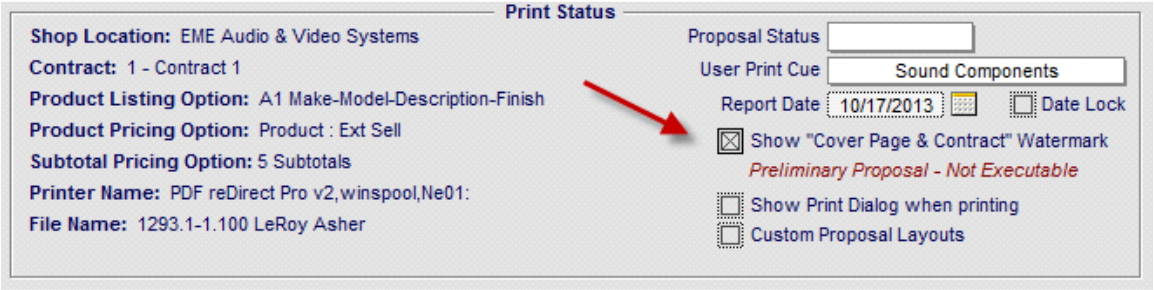
You can now change the Creation Date of a Proposal from the Proposal/Utility/Administrator screen. Only Users logged in as an Administrator have access to this screen.



Enhancement - Proposal/Print Menu: Cover Page & Contract: Preliminary Watermark

You now have the option to add a Preliminary Watermark to the Proposal Cover Page and Contract, by checking the Option box on the Print Menu screen. In addition to this you users can change the default watermark message from “Preliminary Proposal - Not Executable” to a customized message of their choice. Users also have the option to default to this the Watermark message when entering the Proposal Print Menu screen requiring them to uncheck the Watermark Message checkbox if they do not want to print their Proposal with the watermark.


Proposal Cover Page & Contract Watermark
Check this box if you want the Watermark to always appear
on the Proposal Cover Page & Contract,
unless you uncheck (Hide) the Watermark Option box,
on the Proposal Print Menu screen.
Default Watermark
Preliminary Proposal - Not Executable
User Override Watermark


Print Status
Shop Location: EME Audio & Video Systems
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:
File Name: 1293.1-1.100 LeRoy Asher
Proposal Status
User Print Cue
Sound Components
Report Date
10/17/2013
Date Lock
Show "Cover Page & Contract" Watermark
Preliminary Proposal - Not Executable
Show Print Dialog when printing
Custom Proposal Layouts

Preliminary Proposal - Not Executable

ITEMIZE WIRE

Version 1

Designed and Prepared for

Phil Egner
567 58TH Street
Oakland, CA 94607

(H) 715-946-3443

Jim Engandela
President

Itemize Wire
for Phil Egner

EME audio & video

Phil Egner
567 58TH Street
Oakland, CA 94607

Home Phone: 715-946-3443

Mobile: 715-577-0077
Fax: 715-684-6321

Preliminary Proposal - Not Executable

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.

Payments
All payments for this proposal must be made in accordance with stated dates and payment terms.

Service Calls After Installation
Service calls performed due to component failure will be billed for at time and materials, even if the component is under warranty.

Change Orders
Any requested changes or deviations from this proposal will be considered a "change order". Change orders must be presented to the client and signed for by both the client and EME Audio & Video. EME Audio & Video reserves the right to substitute any piece of equipment in this proposal in case of unavailability or discontinuation for an equal or greater value model. EME Audio & Video is not responsible in any way for a product's discontinuation or unavailability.

Drywall, Painting and Carpet
EME Audio & Video is not responsible for repairing, re-patching or re-painting drywall. The client

Enhancement - Proposal & Project Change Order Reports: Add Separator Lines

All 13 Master Proposal and Project Change Order Reports now have a Separator line before each Product, that surrounds the product and its supplements. This helps with the clarity of these reports.

Pending Change Order
1284.1c2-1.100

Date

Home Entertainment System

Change Order

for

John & Mary Smith

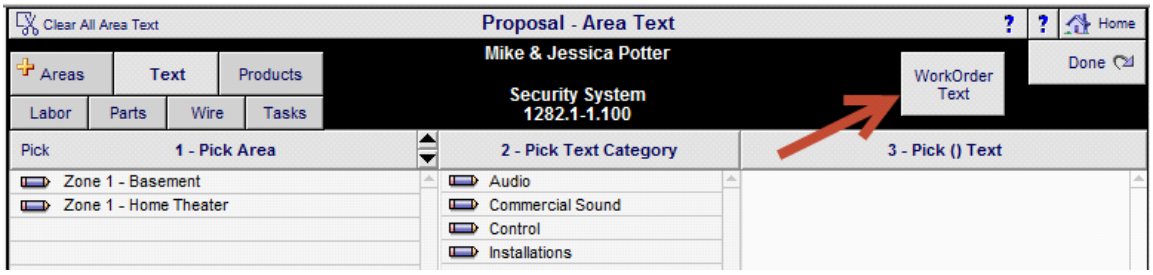
Master Change Order by Area

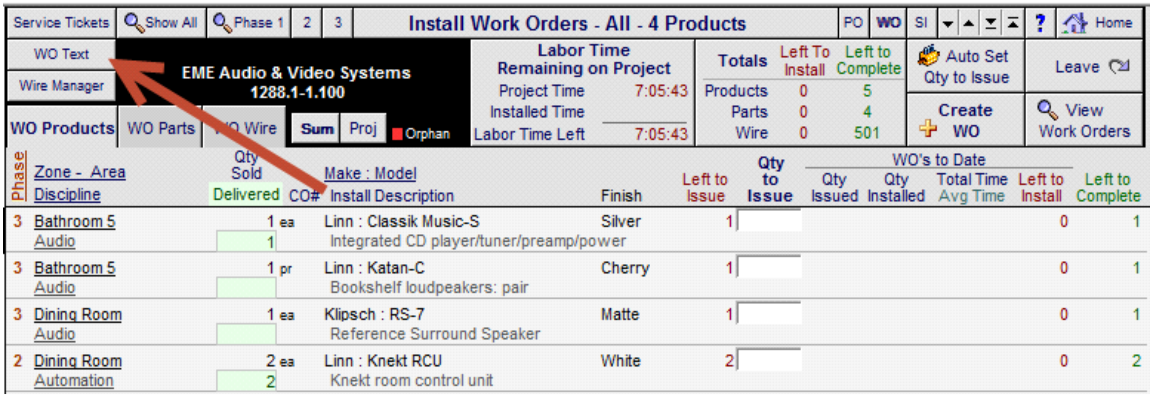
Zone - Area
Discipline
Make - Model - Description
Part Wire

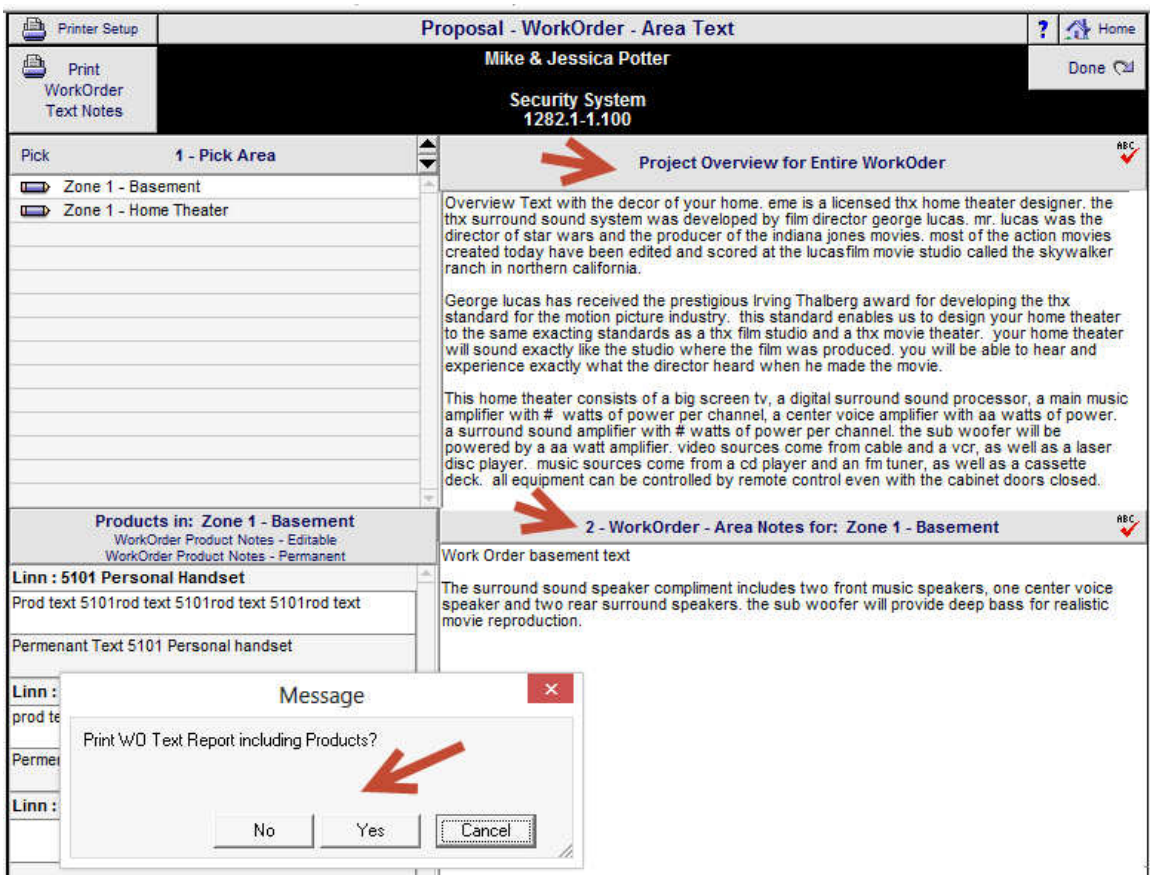
	Qty	Unit Price	Ext Price
Zone 1 - Home Theater			
Audio			
Linn : Melodik : Aktive isobarik bass extension loudspeaker : Black	1 ea	$4,950.00	$4,950.00
Linn - Phono Plugs-Standard - Pack 6 red/6 black standard phono plugs	1 ea	$95.00	$95.00
Linn : Bulk Analog interconnect : Analog interconnect	75 ft	$4.25	$318.75
Linn : Classik Music-S : Integrated CD player/tuner/preamp/power amplifier : Silver	1 ea	$1,550.00	$1,550.00
Linn : Black Interconnect : Pair of phono-phono leads (Black cable)	1 pr	$120.00	$120.00
Linn : Klimax Chakra 500 Twin-BindPost : Klimax two-channel power amplifier : Silver	1 ea	$7,995.00	$7,995.00
Linn : Black Interconnect : Pair of phono-phono leads (Black cable)	1 pr	$120.00	$120.00
Linn : Silver Interconnect : Pair of phono-phono leads (Silver cable)	1 pr	$325.00	$325.00
Zone 3 - Office			
Video			
Sony : KV-27FS13 : 27 FD Trinitron® WEGA® TV	1 ea	$549.99	$549.99
Monster : HDMI400-1M : 1m HDMI400 Super-High Performance A/V Cable	1 ea	$99.95	$99.95
Sony : KDE-50XS955 : 50" Plasma Television : Silver	1 ea	$7,249.95	$7,249.95
Monster : HDMI400-1M : 1m HDMI400 Super-High Performance A/V Cable	1 ea	$99.95	$99.95

Enhancement - Proposal & Project: Area Text/WO Text: Work Order Overview, Area, Products

From the Proposal or Project or Project/Work Order screens you can now create a Work Order Report with an Overview section, text for each Area and text for each Product those Areas. You can print this report with or without Products.







Enhancement - Proposal/Print Menu: New Areas & Products report without Area Text

This new Proposal section is exactly the same as the Areas & Products report except it does not have Area Text.

Printer Setup | PDF reDirect | Copy

Proposal - Print Menu

Refresh Reports | ? | Home

PDF reDirect Pro v2,winspool,Ne01:

Ace Matthews
All Creative Enterprises
Home Automation
1270.1-1.100

Send Email
- Client
- Manager
- Salesman
- Engineer

Done | Prefs | Print Options

Proposals | Projects | Costing | Custom

Main Proposal

- Print All Sections
- User Print Cue Sound Components

Proposal Sections

- Cover Page
- Client Intro
- Shop Info
- Overviews
- Areas & Products
  - A&P without Area Text
  - A&P Preliminary Contract with Area Subtotals, Price Expiry, Pricing Policy and 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
- Area
- Phase

Sub Total Summary

- Discipline
- Area
- Phase

Grand Total Summary

- Discipline
- Area
- Phase

Product Summary

- Product Summary by Discipline with Totals

Master Proposal & Supplements

Products, Parts, Wire & Labor

- Discipline
- Area
  - Products & Only Labor
  - Products & Supplements without Prices
- Area by Phase
- Phase

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 Automation
for Ace Matthews All Creative Enterprises

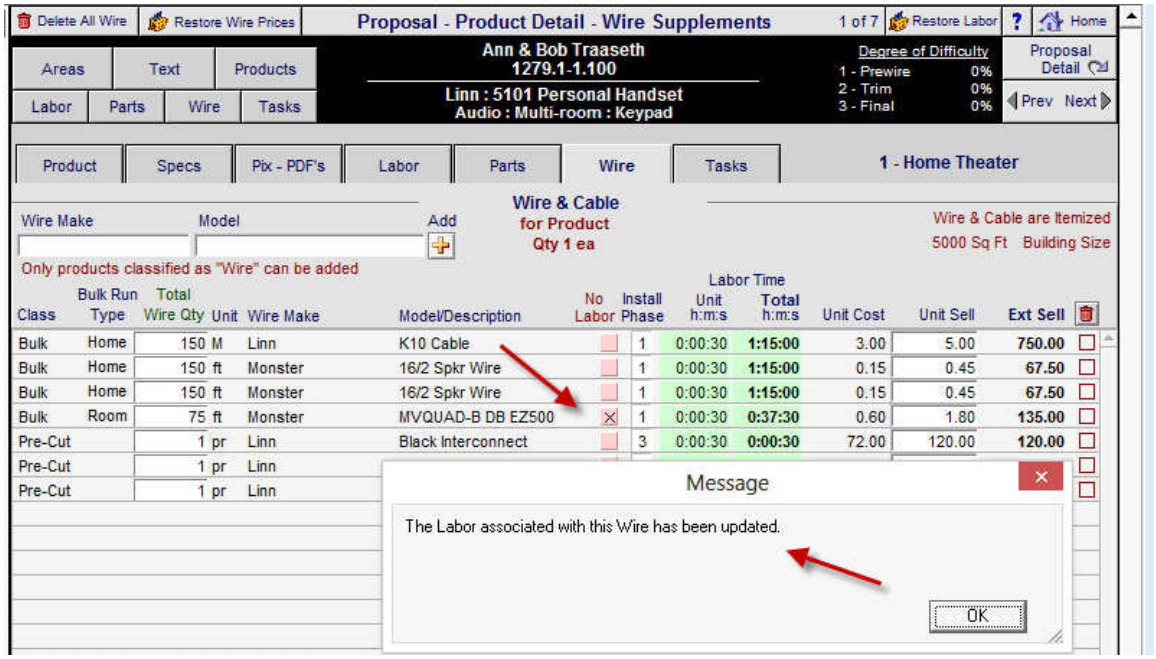
Areas & Products

Zone 1 - Home Theater	Qty	Ext. Price
Audio		
Linn : 5125 : Five channel power amplifier (Black) : Silver	1 ea	$2,337.50
Linn : Katan : Bookshelf loudpeakers: pair : Black	5 pr	$4,228.75
Linn : Melodik : Aktive isobarik bass extension loudspeaker : Black	1 ea	$4,207.50
Video		
Runco : CL-610 : DLP Projector	1 ea	$6,795.75
Sony : DVP-NS999ES : Progressive Scan DVD Player : Black	1 ea	$934.96
Automation		
Linn : Knekt RCU : Knekt room control unit : White	1 ea	$637.50
Linn : 5101 Personal Handset : Universal learning remote : Black	1 ea	$331.50
	Equipment	$19,473.46
	Installation	$995.83
	Misc. Parts	$200.00
	Wire & Cable	$3,737.20
	Zone 1 - Home Theater	**$24,406.49**

Enhancement - Proposal/Wire Supplement - Labor Change Notice

When you change the Wire Qty or other Wire Supplement data in a Proposal you will receive either of these messages, so that you know if the Labor associated with the Wire has been updated or not and how to correct it.

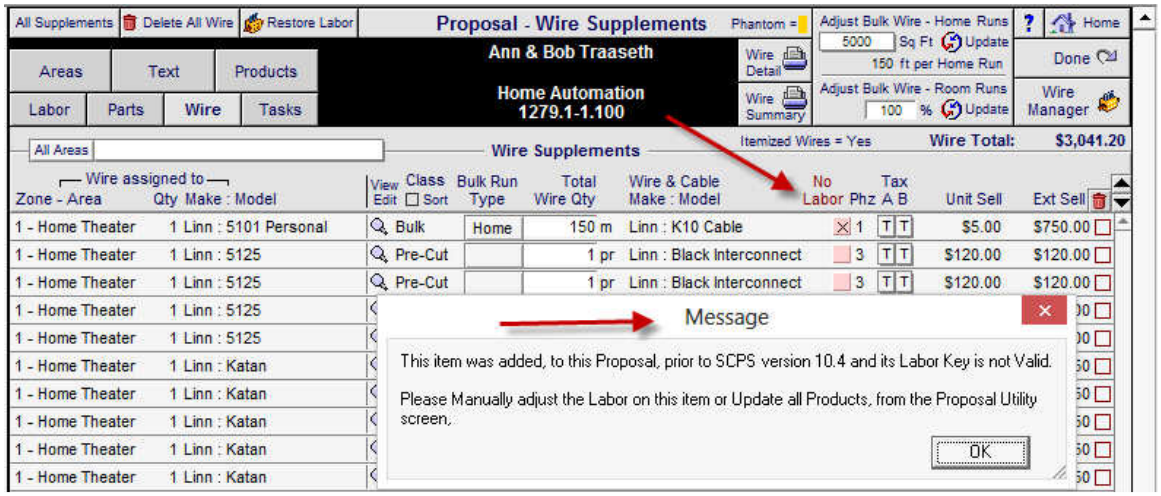
Successful Message:



Not Successful message:

This item was added, to this Proposal, prior to SCPS version 10.4 and its Labor Key is not Valid.

Please Manually adjust the Labor on this item or Update all Products, from the Proposal Utility screen,



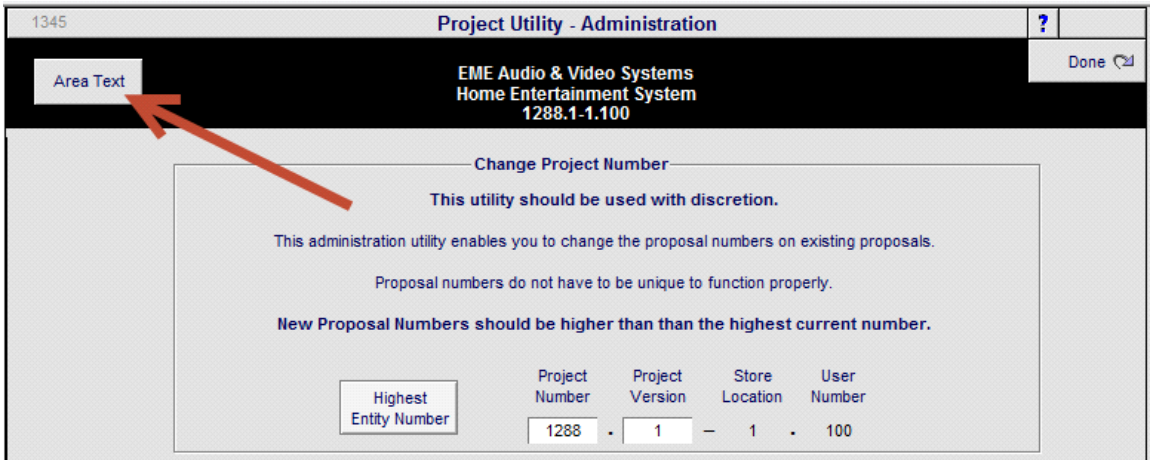
Product Update Utilities to run if you wish.

Enhancement - Project/PO & WO: Delivered and Stage Items

You can entered the Quantity of Delivered items on the Project Work Order or the Project Purchase Order screen and this will increment the Total Delivered Qty.

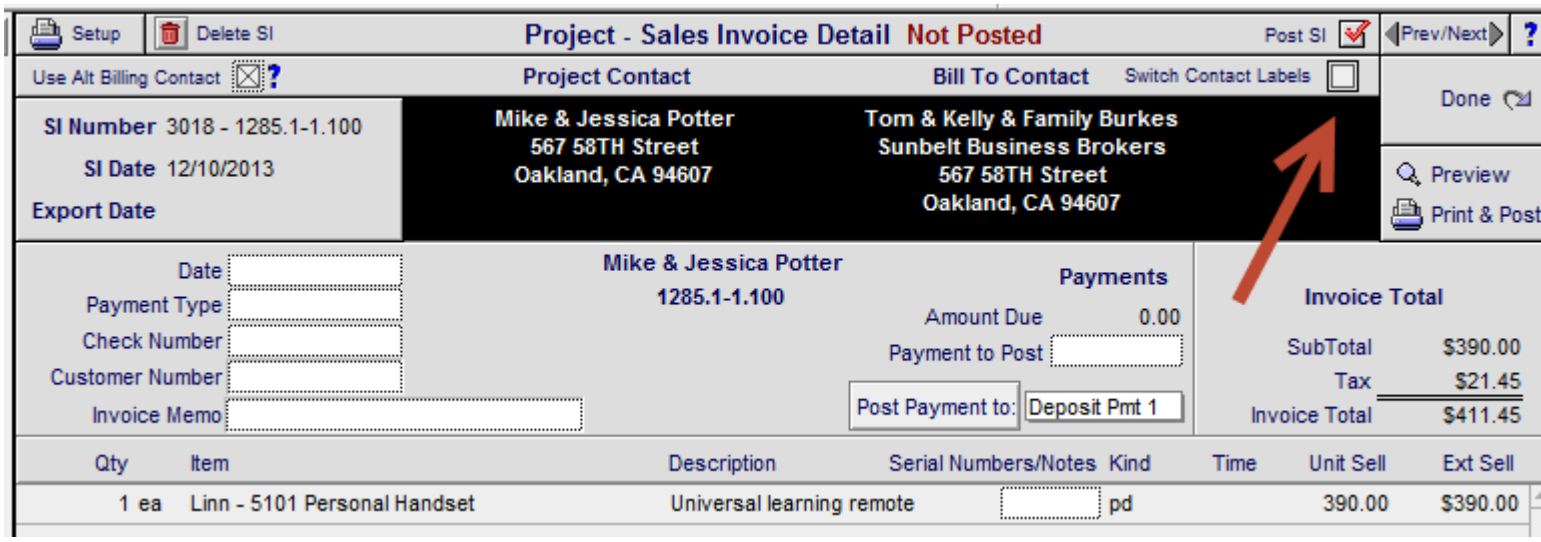
Enhancement - Project/Utility/Administrator: Access Area Text to Modify the Text in Projects

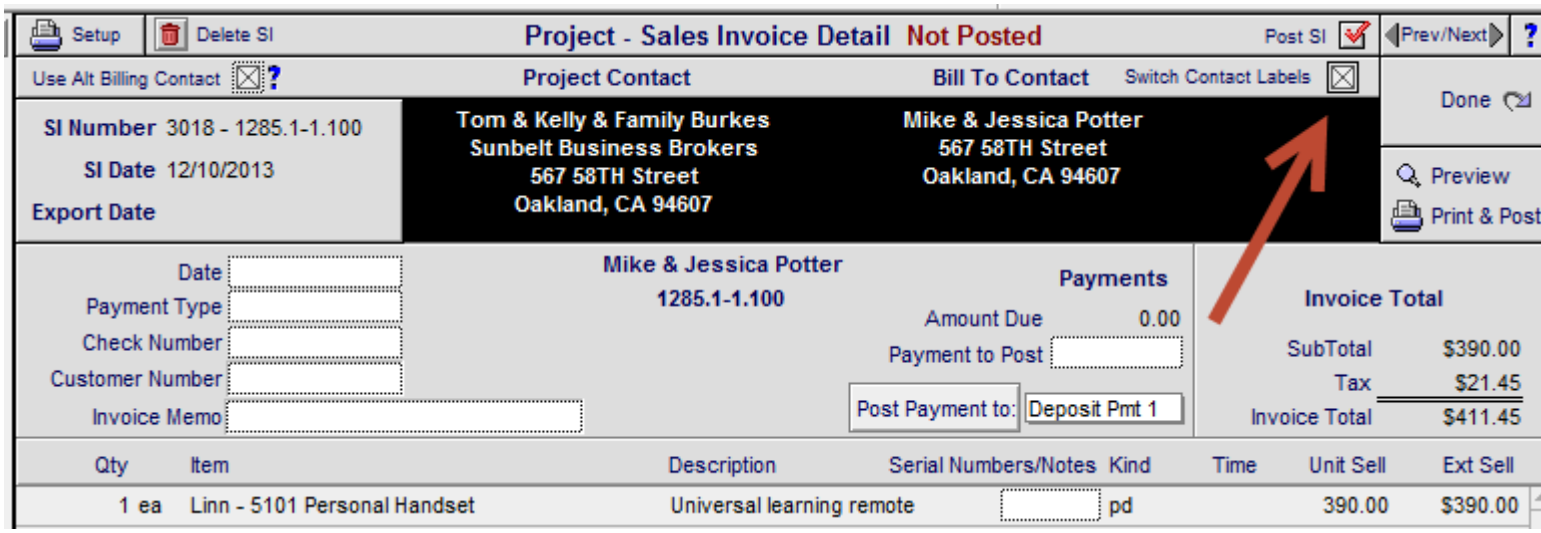
Users with access rights to the Project Utility - Admin screen can click on the Area Text button and modify Project Area Text. This is normally restricted because the client has already signed off on the Project, but can be used in special cases.



Enhancement - Project/Sales Invoices/Invoice: Switch Contac Labels

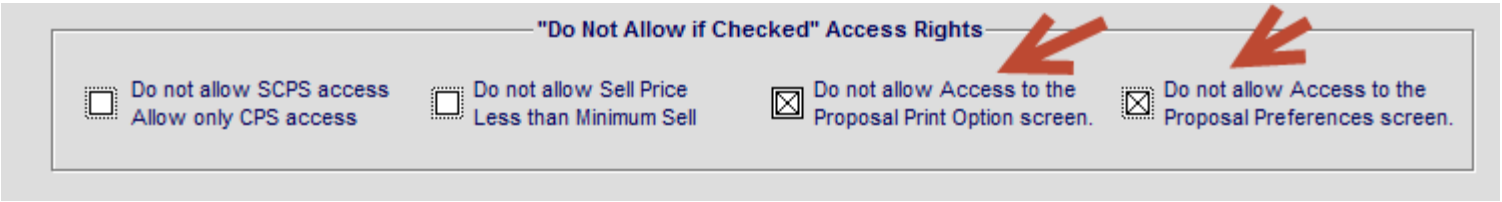
Not only can you choose to use the Alternate Billing Contact, but you can now Switch the Labels on your Sales Invoice to suit your needs.

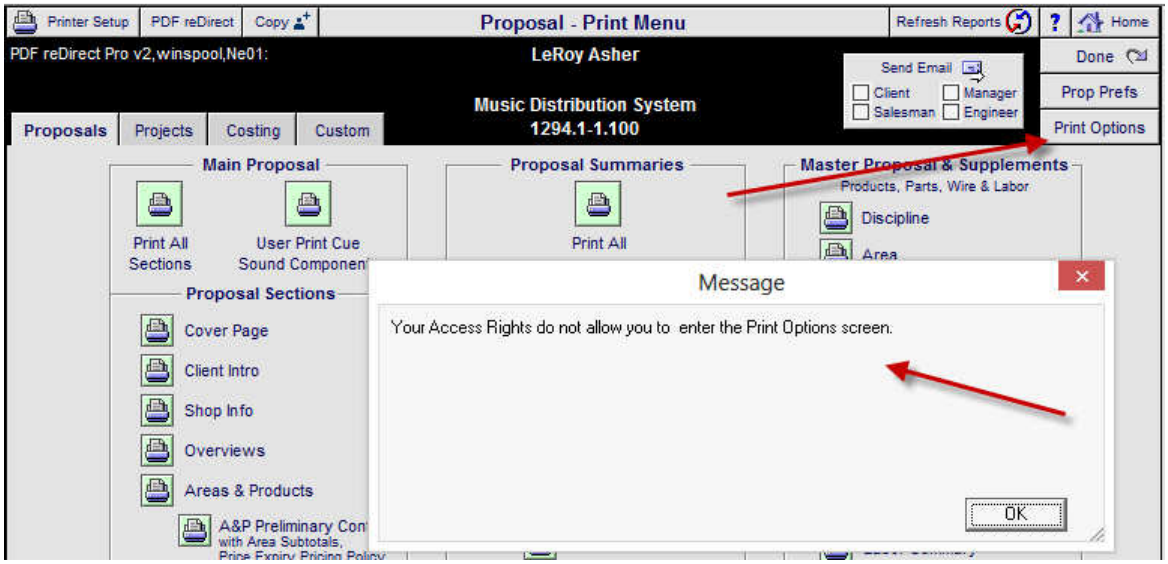




Enhancement - Master Prefs/Users/Access Rights: Access Print Option Screen

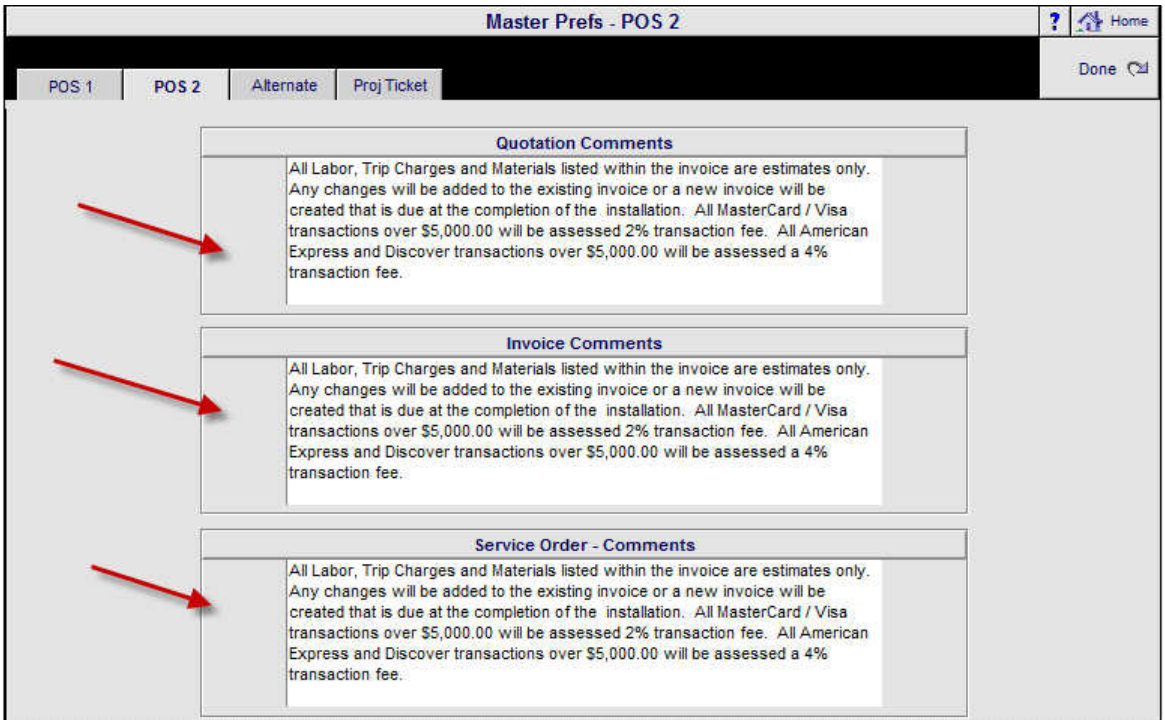
You can now choose to not allow a user to enter the Proposal Print Options screen to control the way Proposals are printed. You will find this Right Checkbox in the "Do Not Allow if Checked" section of the Master Prefs/User/Access Rights screen.





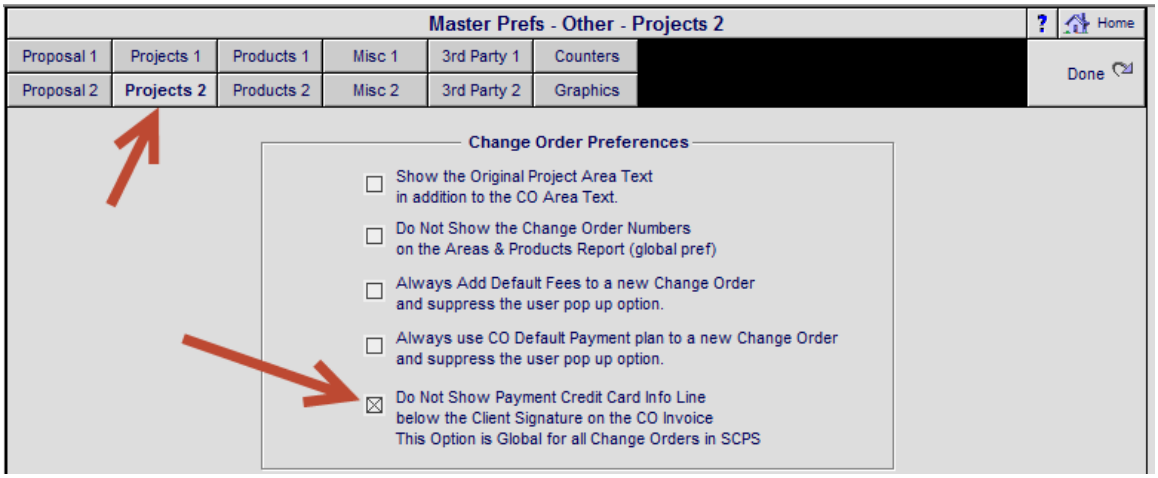
Enhancement - Master Prefs/POS/POS 2: Increase POS Comments Text Size

The POS Comments fields that show up on POS Quotations, Sales Invoices and Service Orders have been increase in size to accommodate more text.



Enhancement - Master Prefs/Other/Project 2: Project Change Order Payment Line

You can now choose to show or not Show the Payment Credit Card line on the Printed Pending and Final Change Orders.



Please Authorize & Return

Date: John & Mary Smith or authorized signature on clients behalf

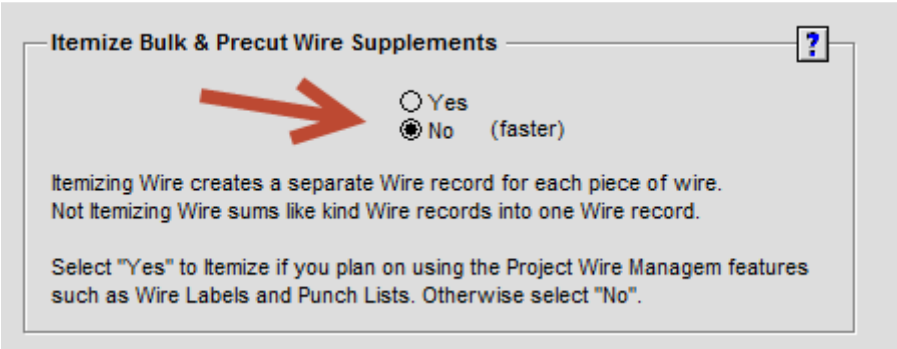
Payment Method	Credit Card Type	Credit Card Number	Payment Amount

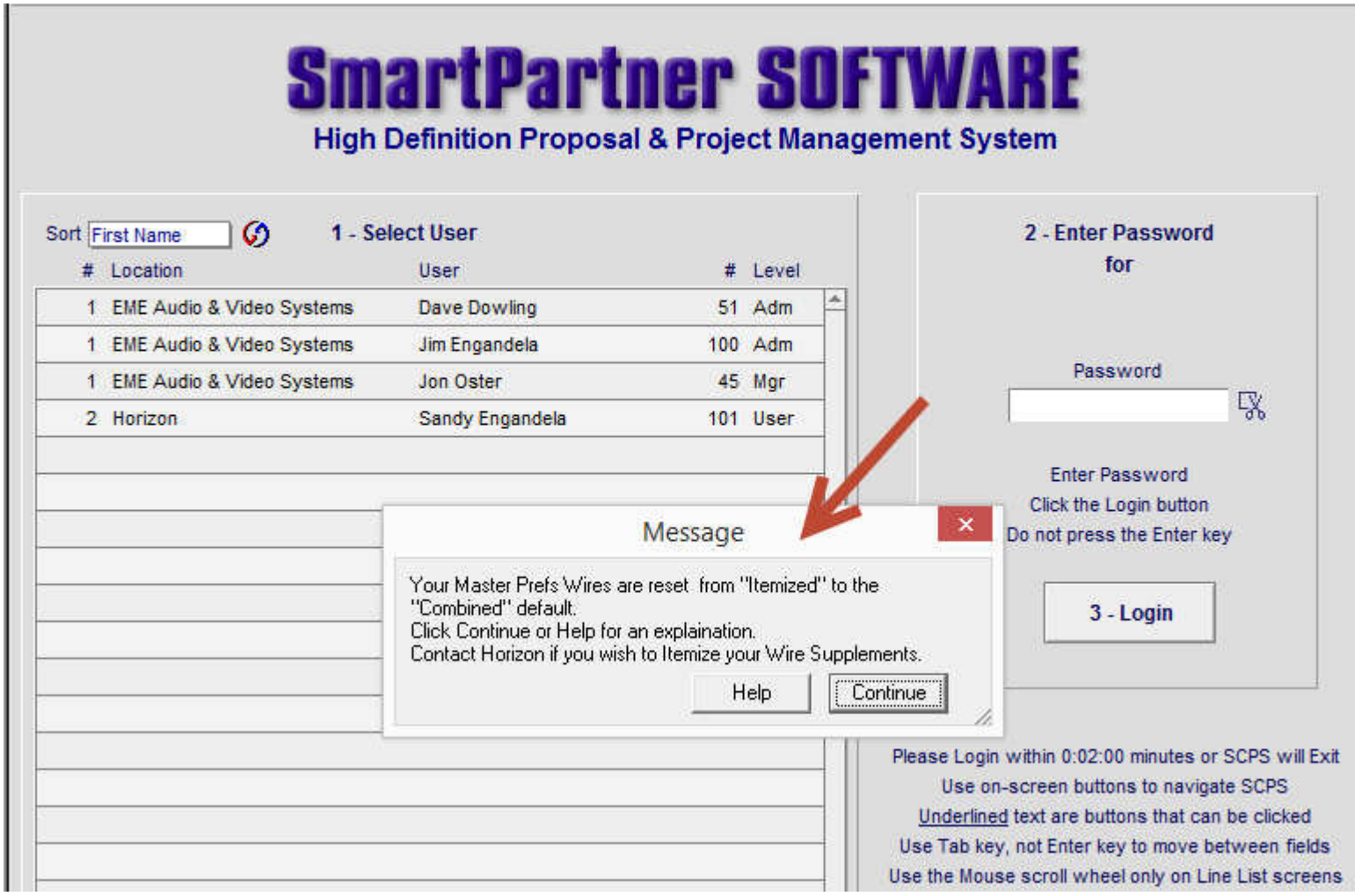
Please Authorize & Return

Date: John & Mary Smith or authorized signature on clients behalf

Enhancement - Master Prefs/Wire/Wire Manager: Auto turn off Itemized Wires

The first time you log into SCPS after the upgrade, if your prefs are set to Itemize Wires, they will be reset to combine wires. This will not affect your existing Proposals or Projects. Itemized wires only benefit you if you are generating Project Wire Labels from within SCPS Projects. Even if you do we will be creating a new module for this and setting prefs to Combine wires will make your Proposal process faster.



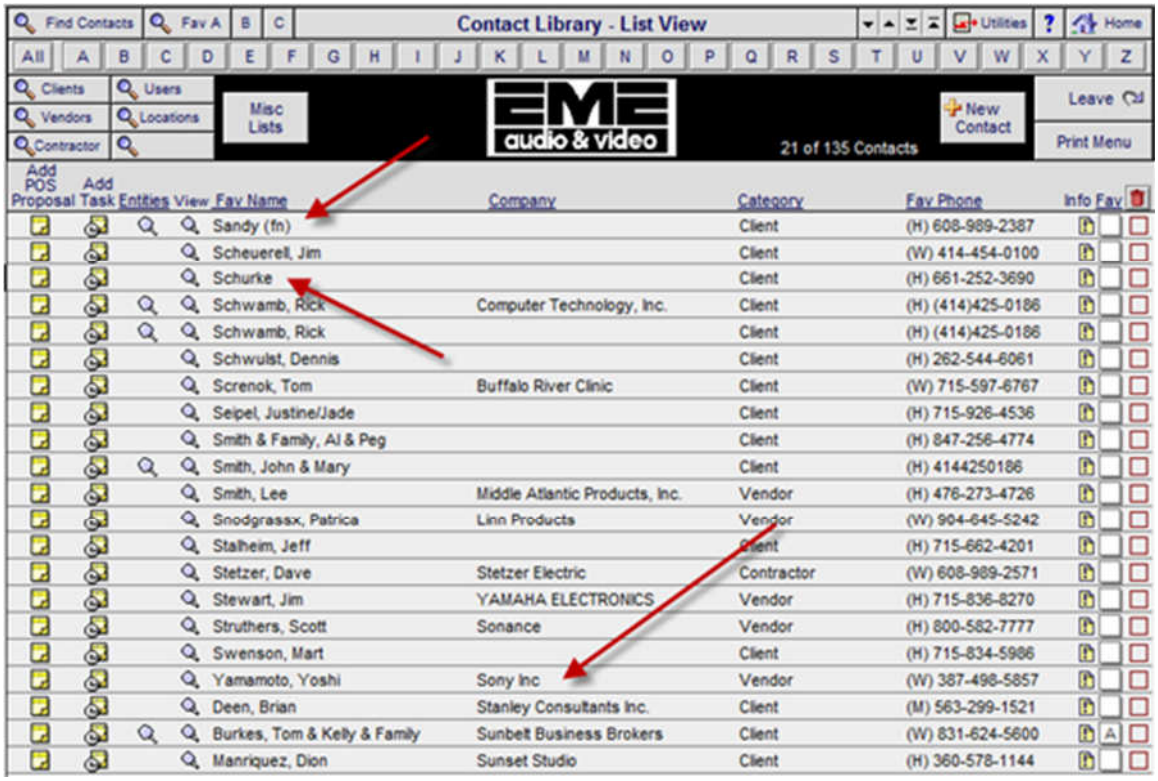


Enhancement - Contacts: List Views Favorite Names display and Sort Order

-Favorite Contact Names no longer start with a "," if there is no Last Name, but an (fn) indicator will now show that this is a First name and not the Last Name.

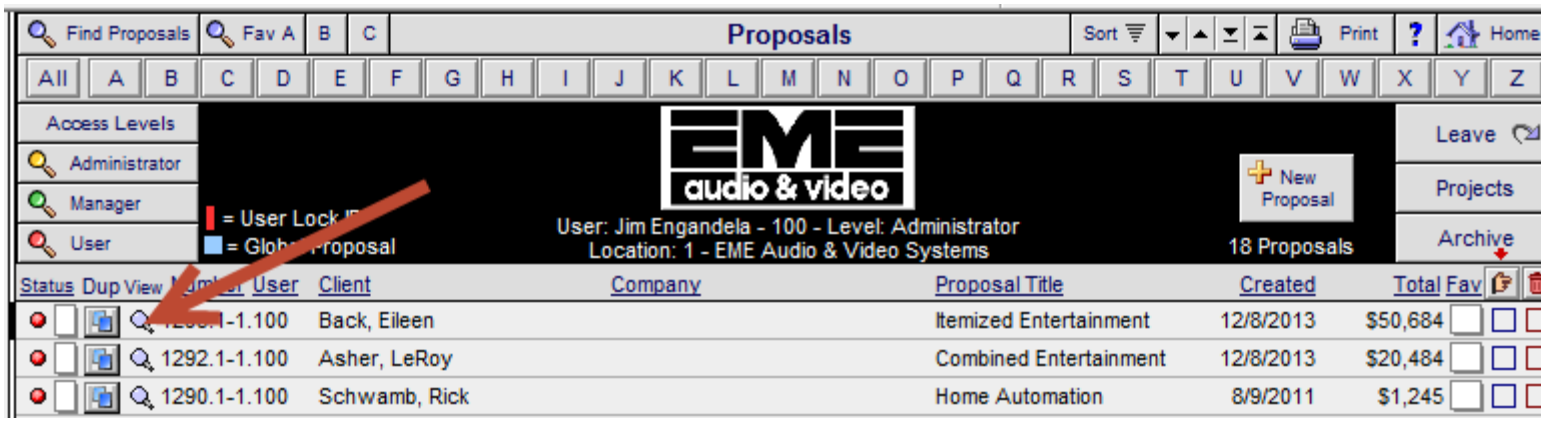
- When you select an alphaFinder character, the Sort Order will now sort by the Fav Name (last name first) and then the Company names will show after all the Fav Names.

-All Header underlined Sort labels now conform to the new sort hierarchy.



Fix - Proposal Duplication: No longer picks up the Master Preferences Bulk wire Time

Duplicating proposals was picking up the Master Prefs bulk wire labor time instead of using the Proposal time as it should.



Fix - Proposal/Supplements/Wire & Parts: Deleting Parts & Wires no longer Deletes Labor Placeholder records

Deleting Parts & Wire Supplements now only deletes the Wire Supplement that you have checked for deletion and not all Wire supplements for that Project or the Labor Placeholder recorders until all of the Parts & Wires for that Product have been deleted.

All Supplements | Delete All Wire | Restore Labor | **Proposal - Wire Supplements** | Phantom = | Adjust Bulk Wire - Home Runs 5000 Sq Ft 60 ft per Home Run | Home | Done

Areas | Text | Products | Labor | Parts | Wire | Tasks

Eileen Back

Itemized Entertainment System
1293.1-1.100

Wire Detail | Wire Summary | Adjust Bulk Wire - Room Runs 100 % Update | Wire Manager

All Areas | Wire Supplements | Itemized Wires = Yes | Wire Total: $7,570.00

Wire assigned to: Zone - Area	Qty	Make : Model	View Edit	Class Sort	Bulk Run Type	Total Wire Qty	Wire & Cable Make : Model	No Labor	Phz	Tax A	Tax B	Unit Sell	Ext Sell
Balcony	1	Linn : 5101 Personal		Bulk	Home	60 m	Linn : K10 Cable		1	T	T	$5.00	$300.00
Balcony	1	Linn : 5101 Personal		Bulk	Home	60 m	Linn : K10 Cable		1	T	T	$5.00	$300.00
Balcony	1	Linn : 5101 Personal		Bulk	Home	60 m	Linn : K10 Cable		1	T	T	$5.00	$300.00
Balcony	1	Linn : 5101 Personal		Bulk	Home	60 m	Linn : K10 Cable		1	T	T	$5.00	$300.00
Balcony	1	Linn : 5101 Personal		Bulk	Home	60 m	Linn : K10 Cable		1	T	T	$5.00	$300.00
Balcony	1	Linn : 5101 Personal		Bulk	Home	60 m	Linn : K10 Cable		1	T	T	$5.00	$300.00
Balcony	1	Linn : 5101 Personal		Bulk	Home	60 m	Linn : K10 Cable		1	T	T	$5.00	$300.00
Balcony	1	Linn : 5101 Personal		Bulk	Home	60 m	Linn : K10 Cable		1	T	T	$5.00	$300.00
Balcony	1	Linn : 5101 Personal		Bulk	Home	60 m	Linn : K10 Cable		1	T	T	$5.00	$300.00
Balcony	1	Linn : 5101 Personal		Bulk	Home	60 m	Linn : K10 Cable		1	T	T	$5.00	$300.00
Balcony	1	Linn : 5101 Personal		Bulk	Home	60 ft	Monster : 16/2 Spkr Wire		1	T	T	$0.45	$27.00

All Supplements | Delete All Labor | **Proposal - Labor Supplements** | Phantom Supplement = | Print | Home | Done

Areas | Text | Products | Labor | Parts | Wire | Tasks

Eileen Back

Itemized Entertainment System
1293.1-1.100

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

Labor Summary

All Areas | Labor Supplements | Labor Total: 107:30:00 $7,800.00

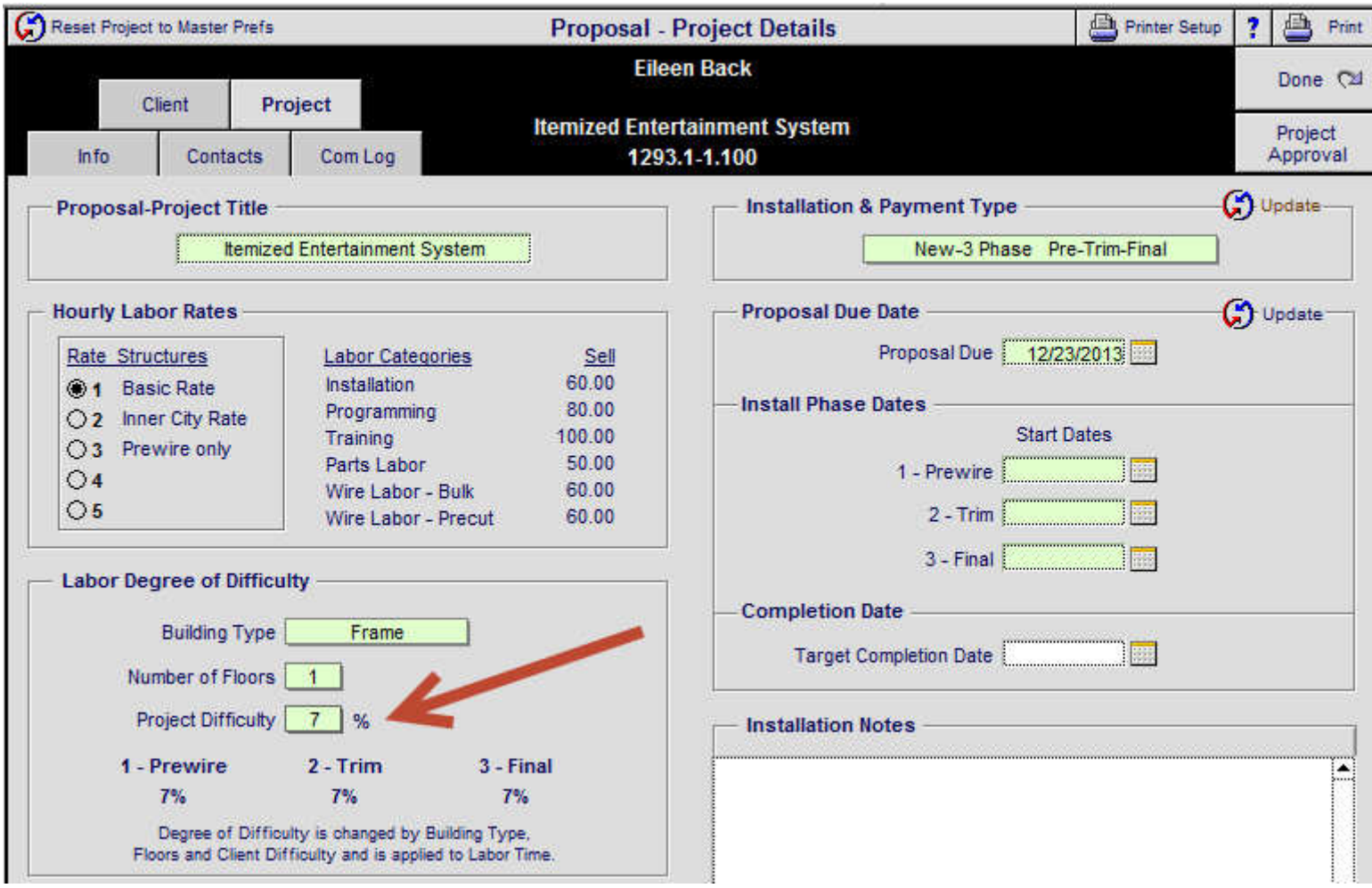
Labor assigned to: Zone - Area	Qty	Make : Model	View Edit	Labor Type Sort	Labor Note	Install Phases	Tax A	Tax B	Hourly Rate	Total Time with DOD (h:m:s)	Ext Sell
Balcony	10	Linn : 5101 Personal Handset		Installation		1	T	T	$60.00	10:00:00	$600.00
Balcony	10	Linn : 5101 Personal Handset		Programming		2	T	T	$80.00	20:00:00	$1,600.00
Balcony	10	Linn : 5101 Personal Handset		Training		3	T	T	$100.00	30:00:00	$3,000.00
Balcony	10	Linn : 5101 Personal Handset		Parts Labor		1,2,3	T	T	$50.00	25:00:00	$1,250.00
Balcony	10	Linn : 5101 Personal Handset		Wire Labor - Bulk		1	T	T	$60.00	20:00:00	$1,200.00
Balcony	10	Linn : 5101 Personal Handset		Wire Labor - Precut		2,3	T	T	$60.00	2:30:00	$150.00

Fix - Proposal/Product Detail/Wire Supplements: No Labor Flag Fix

Adding Products with Wire Supplements that are set to “No Labor” now adds the Labor Record and sets the Time to 0, so that you can uncheck the “No Labor” flag on the Wire once it is in your Proposal and restore the Labor Time if you wish. Also when you adjust the Wire Quantity, the Labor associated with the Wire, will not change if the “No Labor” flag on that wire is checked.

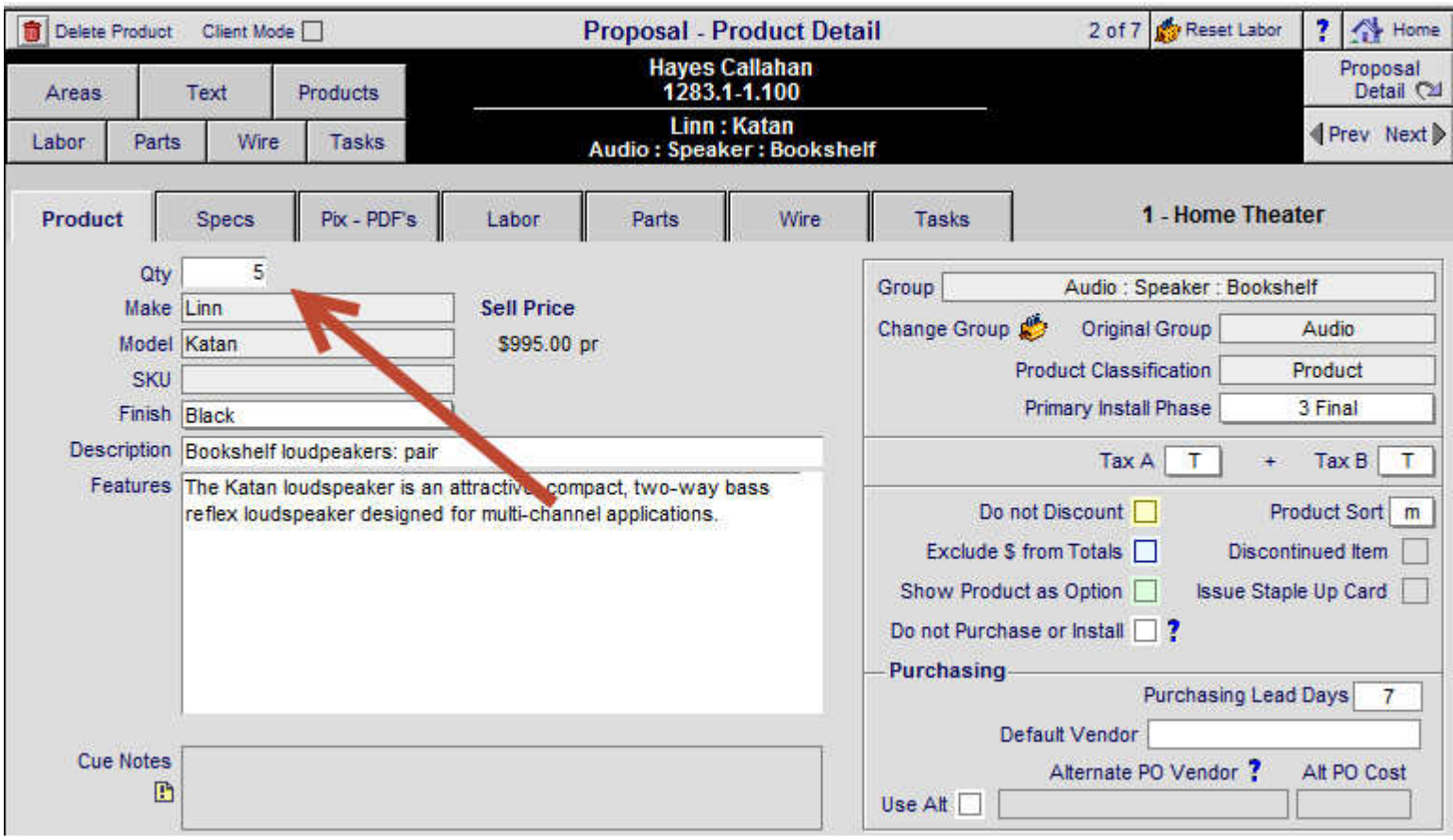
Fix - Proposal/Projects: DOD (Degree of Difficulty) updates all Labor

Changing the DOD on in a Proposal now changes all of the labor in that Proposal instead of just the Wire labor. Any changes you make to DOD on this screen will be automatically updated when you leave the screen.



Fix - Proposal/Product Detail: Reducing Product Qty in Itemized Wire record.

Itemized Wire Proposals create a separate set of Wire records for each product quantity. When the product quantity is lowered those records are deleted as they should, however their deletion was causing the Wire Labor placeholder record to also be deleted and this holds all of the Wire labor for that Product. This has been fixed.



SCPS Version 10.4v1

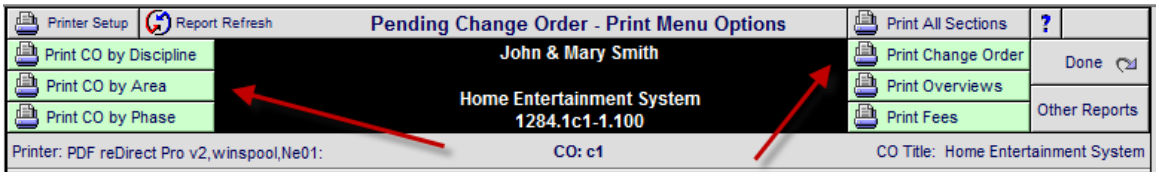
Released: 9/19/2013

Enhancement – Proposal: Improve Picking Products with Wire Supplements

-Speed up creation of Wire supplements when picking products
-Stamp correct phases on wires when picking products
-Stamp zk.wire and zk.parts keys so the wire-wire and part-part relationships work
-Stamp a field in Main Pref for new proposals, that indicates that wirewire and partpart works and then allow for changing the supplement times on those proposals.

Enhancement – Change Order: All CO Reports: Add Client Name on Contract

The Client Name and Payment Type/Amount has been added to the Contract section of All Change Order Reports. The footers on these reports are now all centered and uniform.



Final Change Order
1284.1c1-1.100

Date
8/2/2013

EME audio & video

Home Entertainment System
Change Order
for
John & Mary Smith

	Qty	Ext. Price
Zone 2 - Living Room		
Audio		
Klipsch : RSW-10 : Reference Subwoofer : Black Ash	1 ea	$1,000.00
Linn : Melodik : Aktive isobarik bass extension loudspeaker : Black	2 ea	$9,900.00
Equipment		$10,900.00
Installation		$511.50
Misc. Parts		$285.00
Wire & Cable		$956.25
ZONE 2 - LIVING ROOM		$12,652.75

Electronics & Installation

Equipment	$10,900.00
Installation	$511.50
Misc. Parts	$285.00
Wire & Cable	$956.25
Additional Fees	$589.03
Total	$13,241.78
Tax	$695.90
Grand Total	$13,937.68

Prices quoted are guaranteed until: 7/23/2013

Payment Terms

Payment 1	Due 10 days before the installation final phase	$5,575.07
Payment 2	Due 10 days before the installation trim phase.	$4,181.31
Payment 3	Due 10 days before the installation final phase	$4,181.31

Please Authorize & Return

Date: John & Mary Smith or authorized signature on clients behalf

Payment Method	Credit Card Type	Credit Card Number	Payment Amount

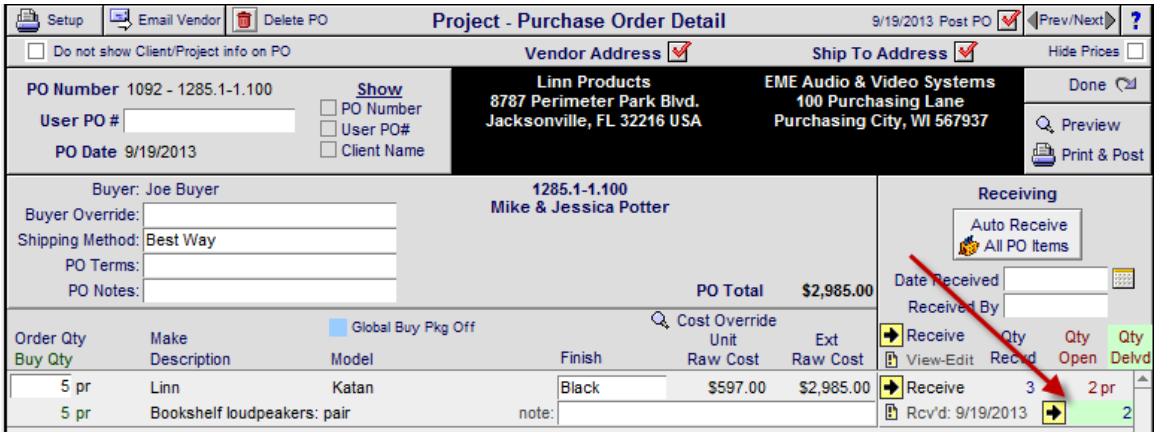
EME Audio & Video Systems 2950 Mall Drive Eau Claire, WI 54701
Ph: 715-287-3335 Fax: 715-287-4464 horizon@triwest.net www.horizon-software.com
Final Change Order: 1284.1c1-1.100 8/2/2013 Page: 1 Initials___

Enhancement – Change Order: Print CO by Dept, Area, Phase: Post totals

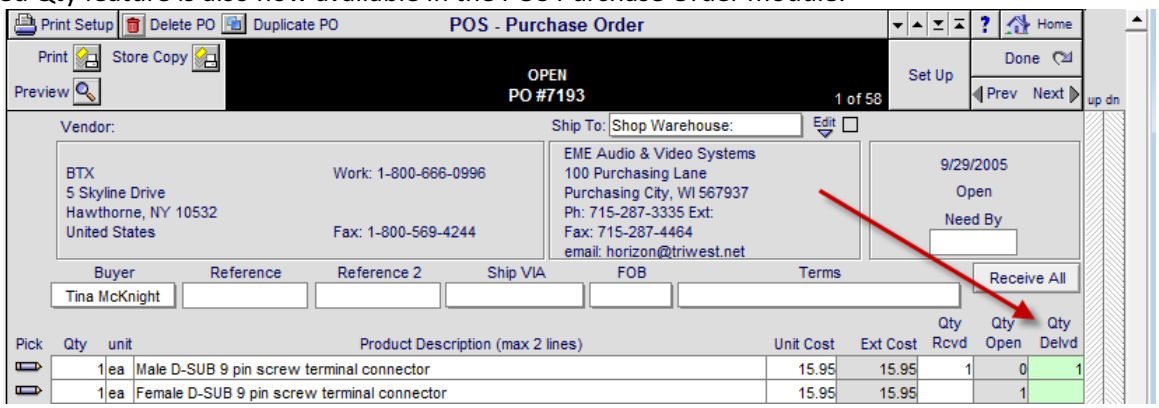
A Posting routine has been added to these reports to ensure that the Change Order totals appear on the Report and not the Project Totals.

Enhancement – Project/PO: Delivered Items

You can entered the Quantity of Delivered items on the Project Purchase Order and this will increment the Total Delivered Qty and show this Total Qty on the PO List screen.

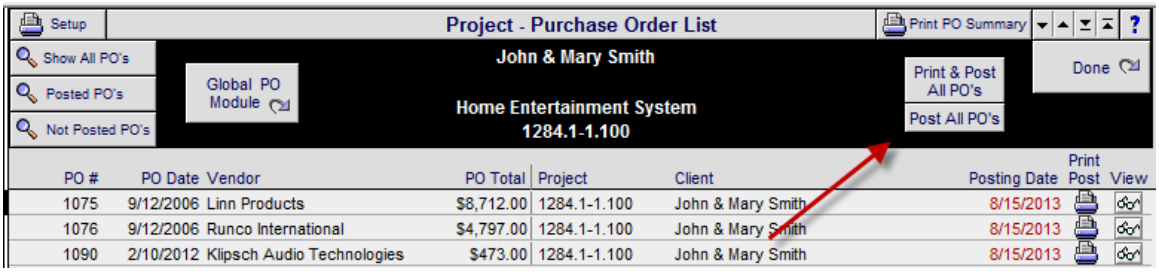


This Delivered Qty feature is also now available in the POS Purchase Order module.



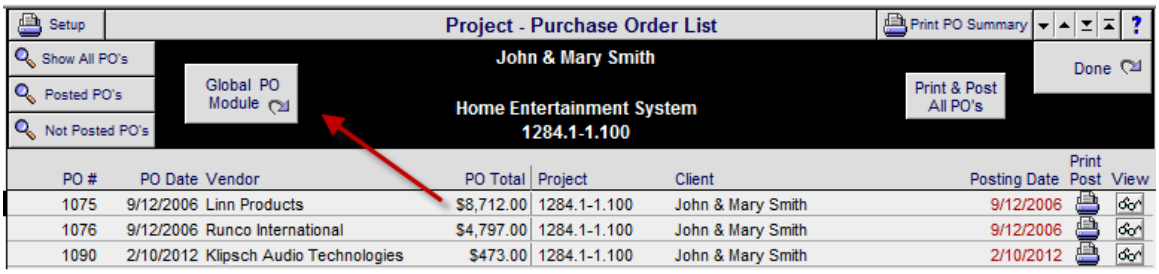
Enhancement – Project/PO/PO List: Post All PO's

You can now Post all of the PO's for all Vendors at one time without having to print them. Posting make them part of the Project. (Finalizes them).



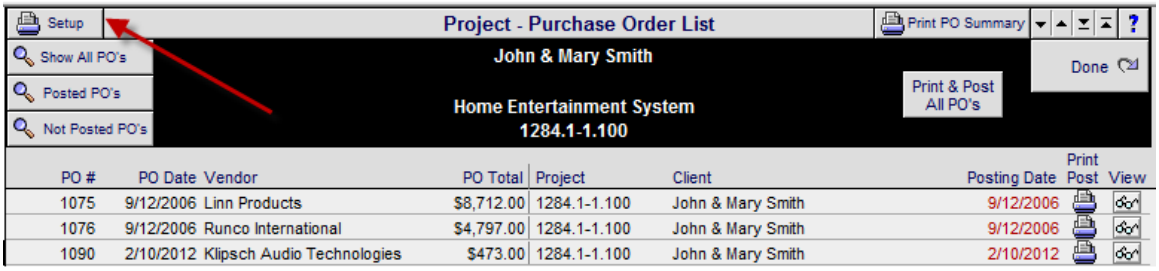
Enhancement – Project/Purchase Order/PO List: Button to Global PO Module

You can now navigate directly to and from the Global Project Manager – Purchase Order module, from within a Project PO.



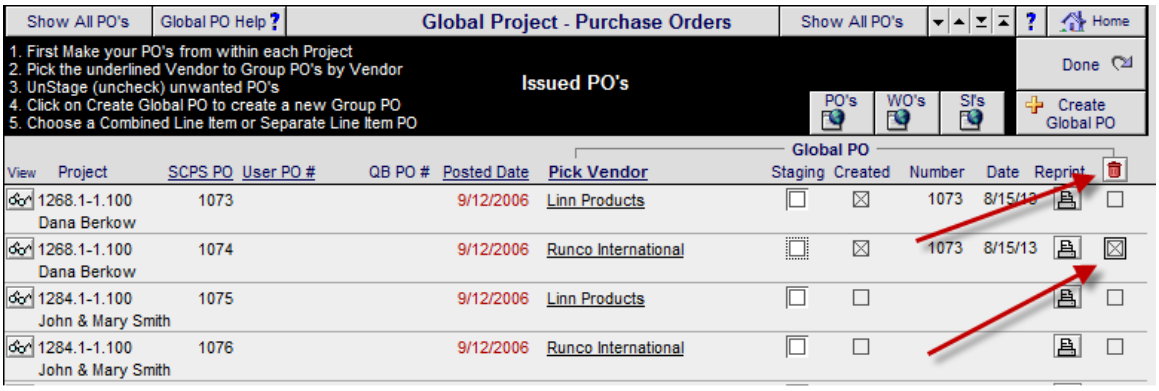
Enhancement – Project/PO, WO, SI: Add Printer Setup button

You can now access the Printer Setup screen from the Project PO List screen to adjust your printer or print to PDF.



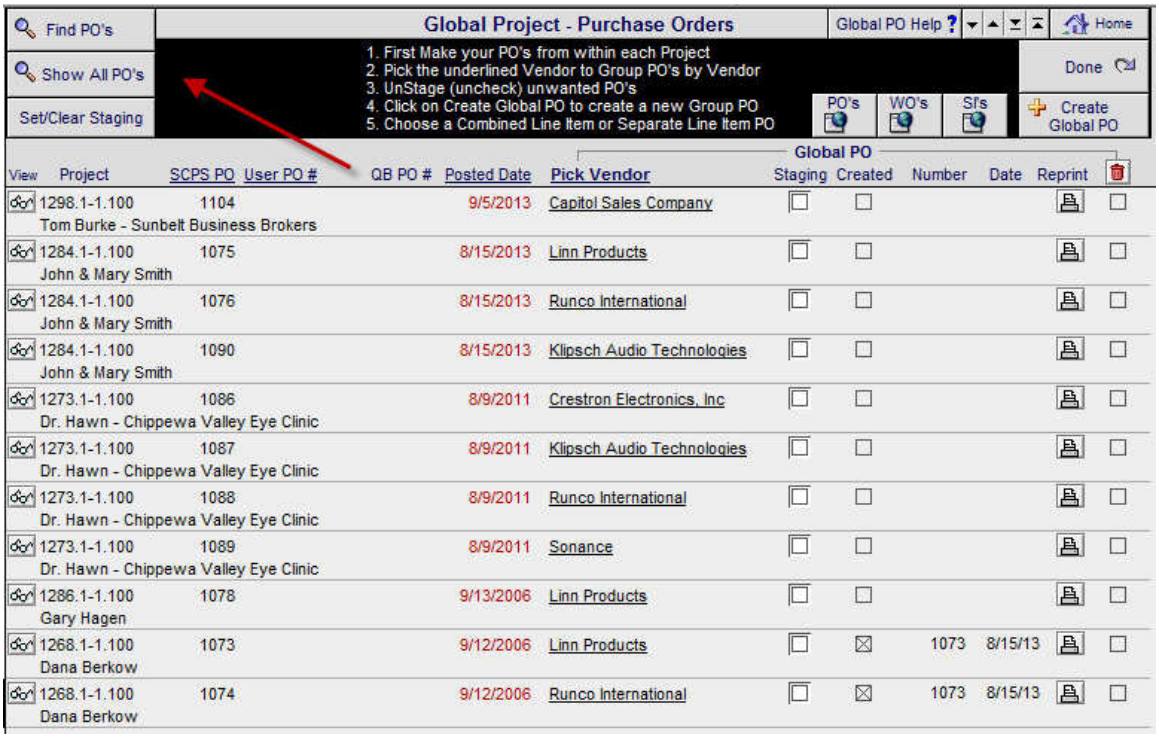
Enhancement – Global Project Manager: Delete Check boxes

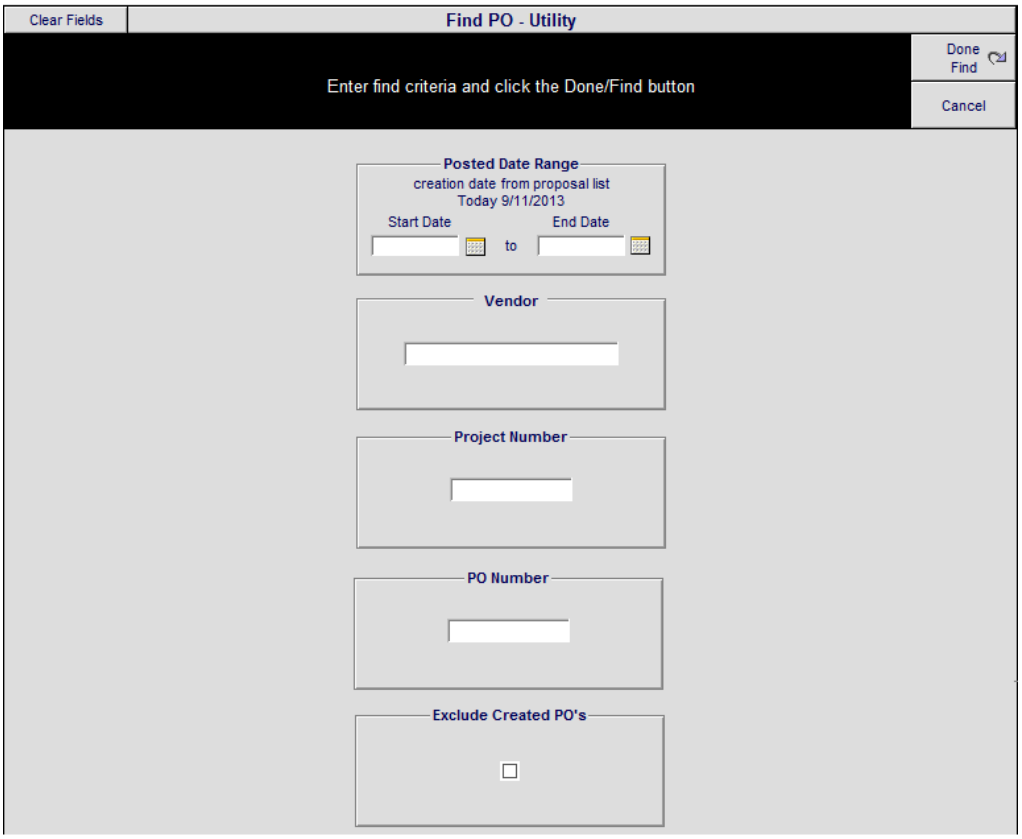
You can now Delete many PO's at one time in the Global Project Manager – PO screen.



Enhancement – Project Manager/Global Purchase Orders:

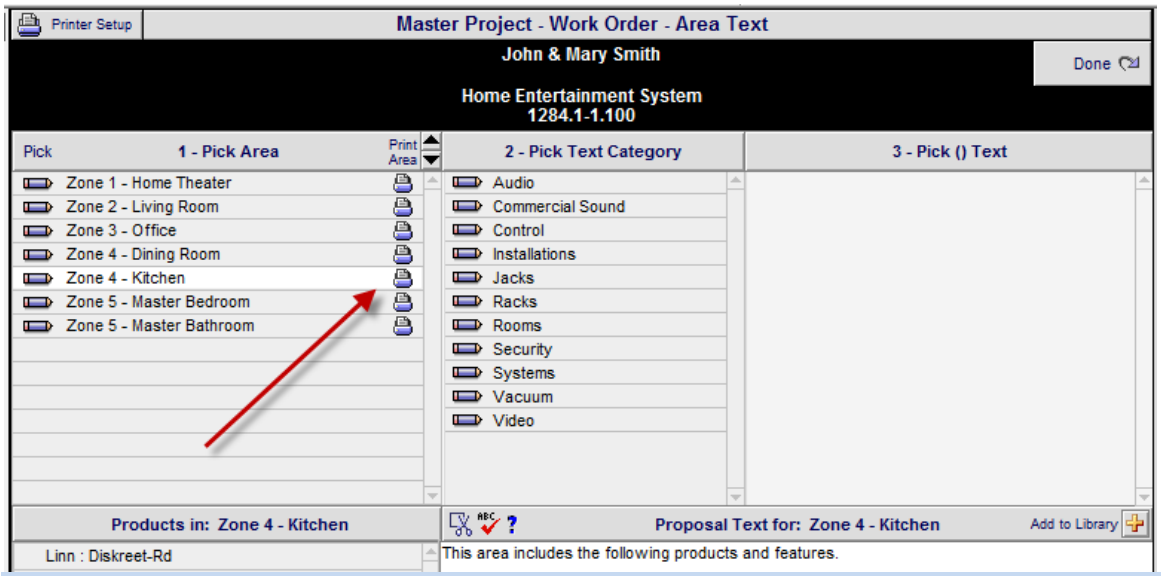
Add new Find PO's, Show All PO's and Set/Clear Staging Utility to the Global Project Manager – PO screen.





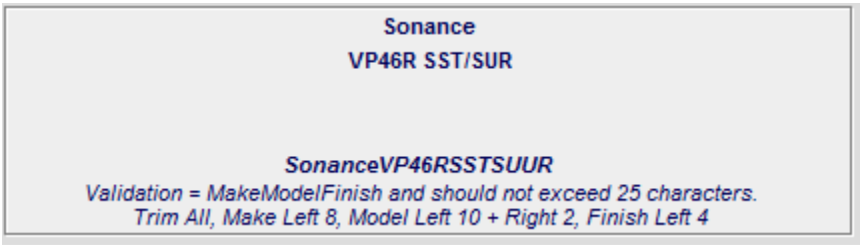
Enhancement – Project/Work Orders/Area Text: Print Area Text Only Report

You can now Print a Report of any single Area Text in a Project with no Products, from the Project Work Order/Area Text screen. This is helpful if an Area does not have any Products, because without products you will not be able to create a Work Order and yet you might want to print the Area Text for Areas without Products.



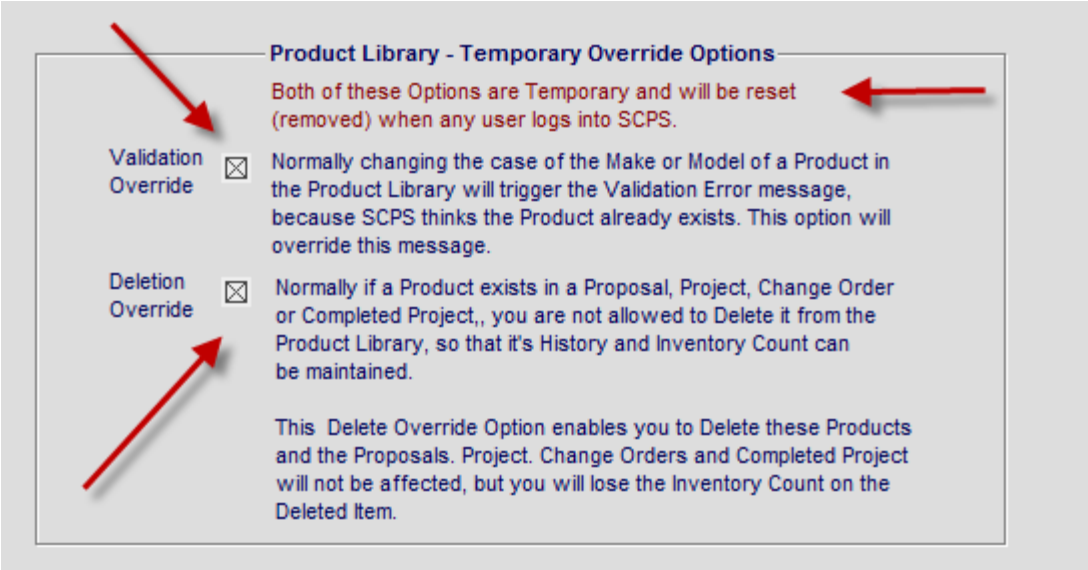
Enhancement – Product Library: Make, Model, Finish Validation

I am now trimming the Make, Model and Finish of all spaces, punctuation and carriage returns prior to concatenating 8 of the left characters of the Make, 10 of the left characters of the Model, 2 of the right characters of the Model and 4 of the left characters of the Finish.



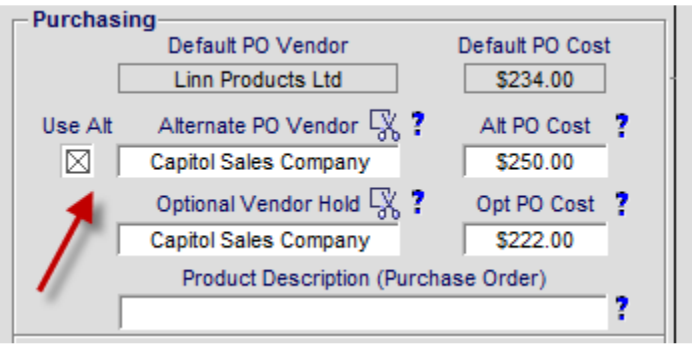
Enhancement – Product Library: Product Deletion and Validation Override Options

Both of the Deletion and Validation Messages can now be temporarily overridden by Administrators. These options are on the Master Prefs/Other/Product 1 screen.

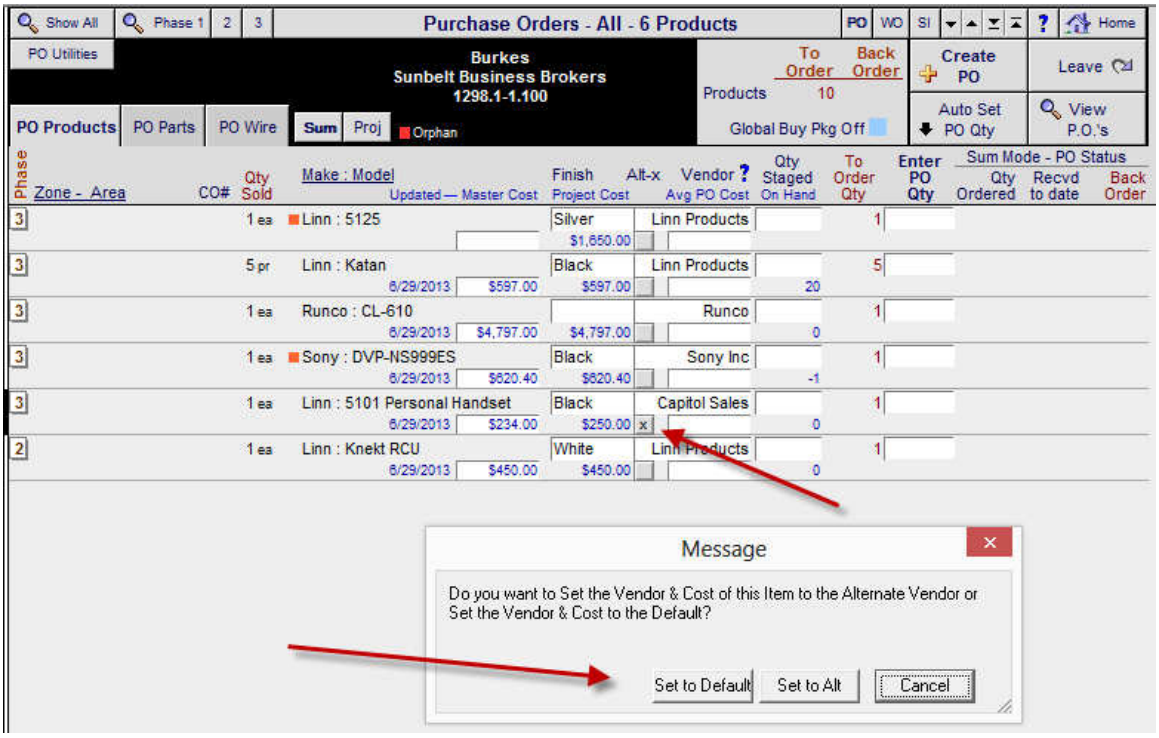


Enhancement – Product Library & Project PO: Alternate PO Vendor

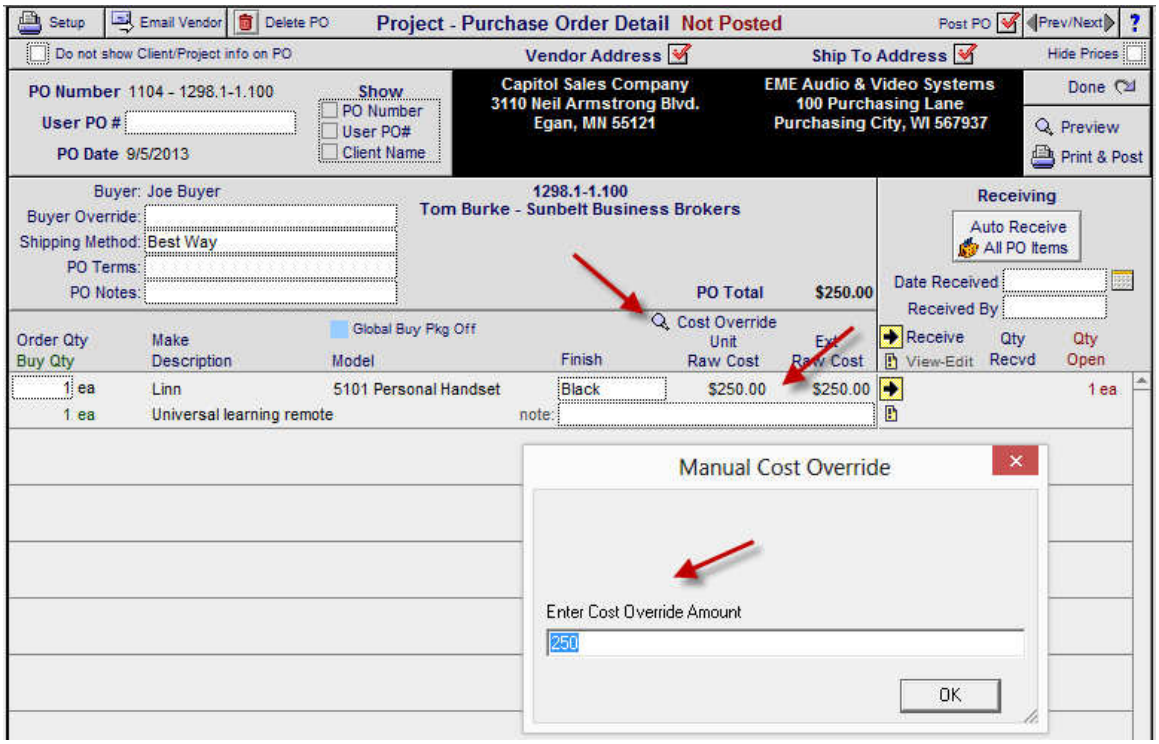
The Product Library/Product Detail screen now shows the Default PO Vendor and the Alternate PO Vendor. Checking the Use Alt box will change Products in Project Purchase Order module to use the Alternate Vendor and Cost on the PO instead of the Default Vendor. The Optional Vendor Hold fields are storage fields for additional vendors and do not have any function besides storage.



The Project Purchase Order screen now has an Alt-x button next to all products that have the Use Alt checked in the Product Library. You can click on this X button and switch between the Default Vendor-Cost and the Alternate Vendor-Cost for this Projects PO's.

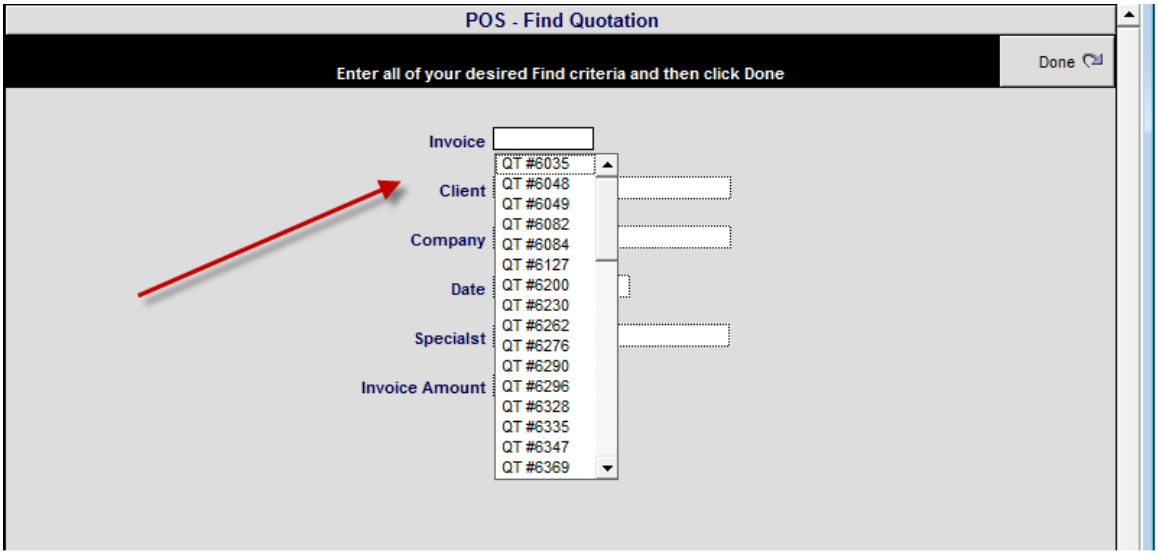


The Project Purchase Order Detail screen now has a Cost Override feature and enables you to click on the Product Cost and enter in a new cost for this PO.



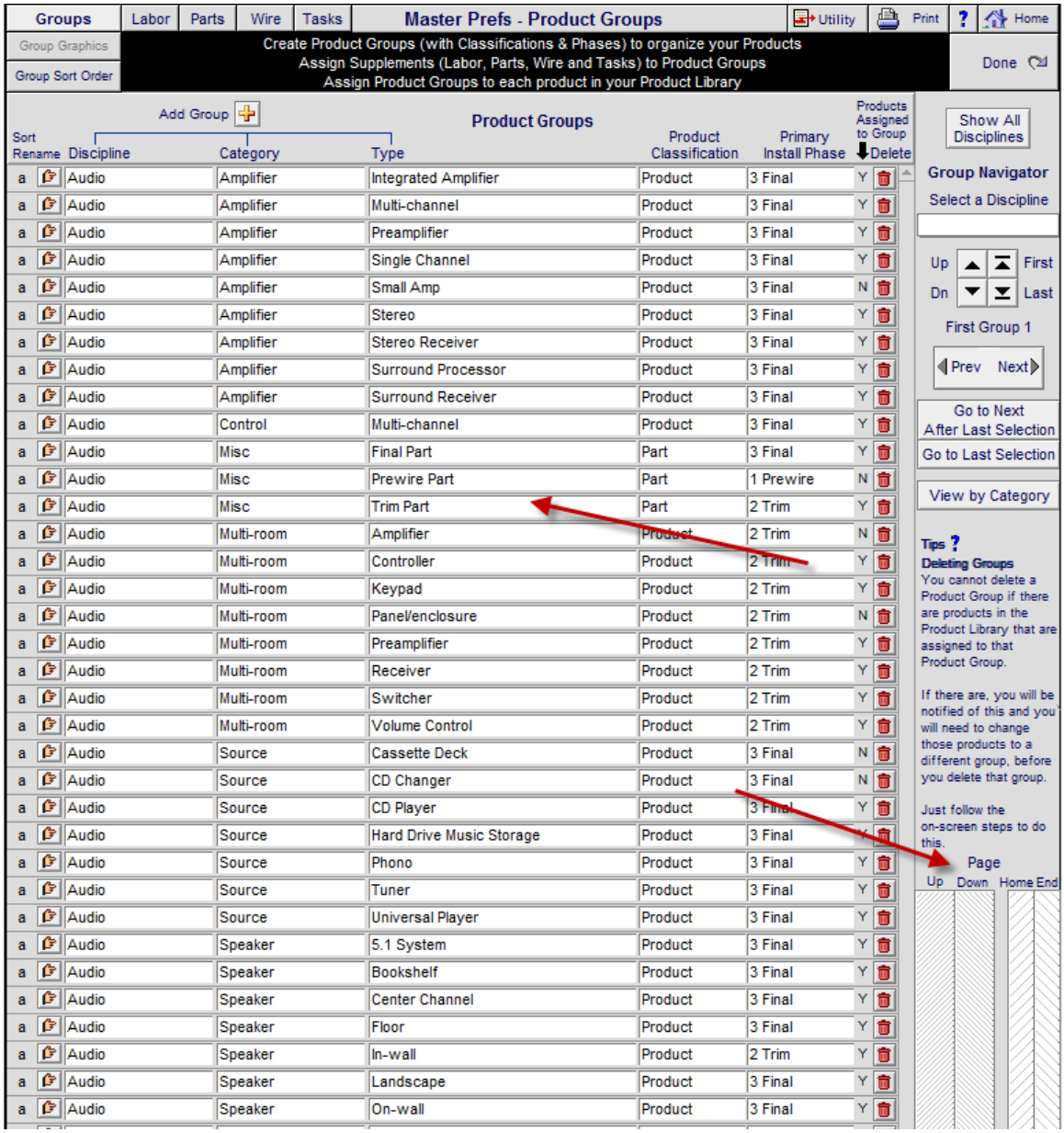
Enhancement – POS/Find POS Invoices

All POS Invoices now have their own dedicated Find screen and pop up lists just show the POS Invoices of that kind.



Enhancement – Master Preferences/Groups: Improve Group screen GUI

You can new view and edit many more Groups and navigate up and down the screen.

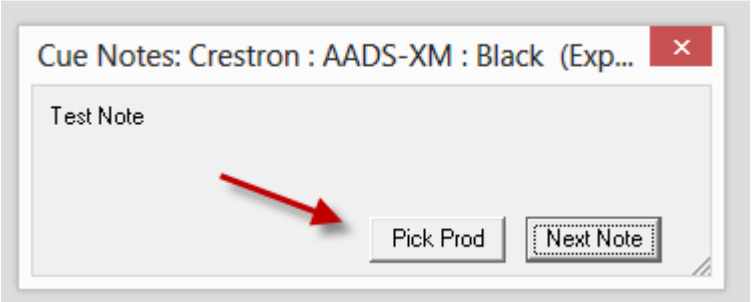


Enhancement – Contact/Utilities/Export Contacts: New Export Map

A new Export routine includes fields shown in the list. You can choose the file format (dbf, tab, etc) , file name and location during the export routine. The exported data can be opened by Excel or other programs.

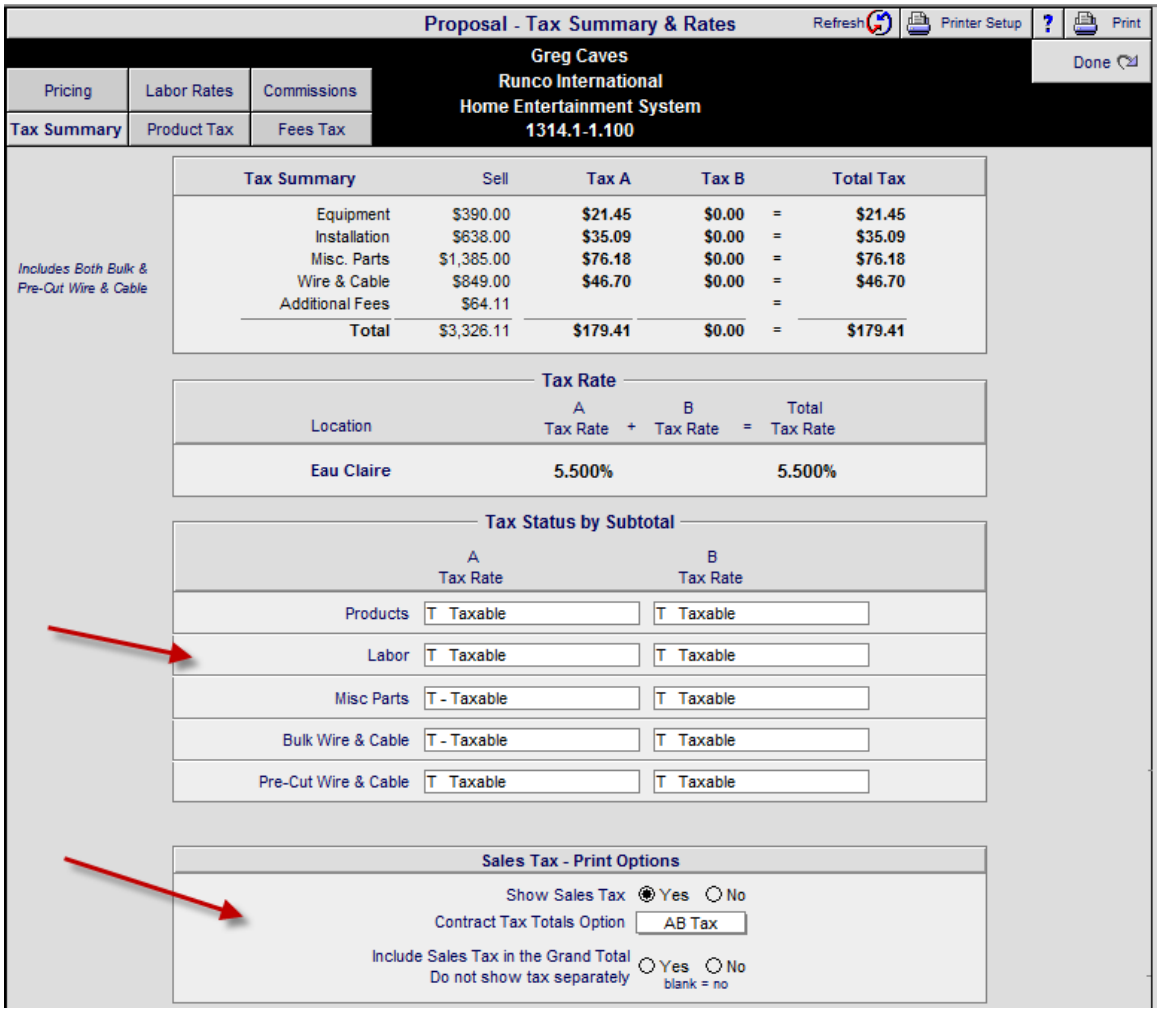
Fix – Proposal/Pick Products: Cue Notes - Pick Product Option Fix

Clicking the Pick Prod button now completes the Pick Product process instead of Halting the script.



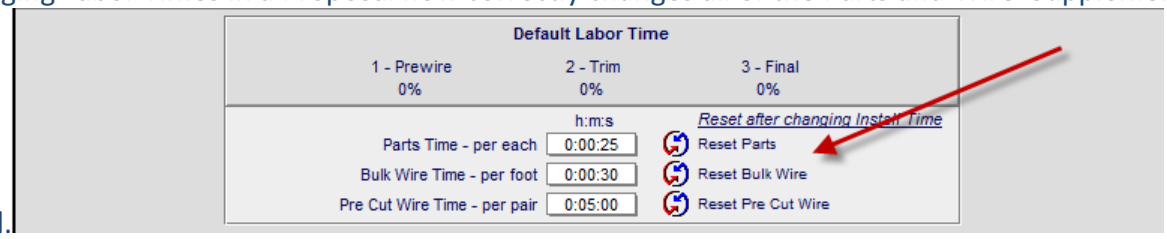
Fix – Duplicating Proposals – Retain Proposal Tax Settings

When Duplicating a Proposal (when you select the Keep Preferences Option) all of the Tax settings of the Original Proposal are now duplicated in the new Proposal.



Fix – Proposal/Pricing/Labor: Change Supplement Labor Times

Changing Labor Times in a Proposal now correctly changes all of the Parts and Wire Supplements in that Proposal.

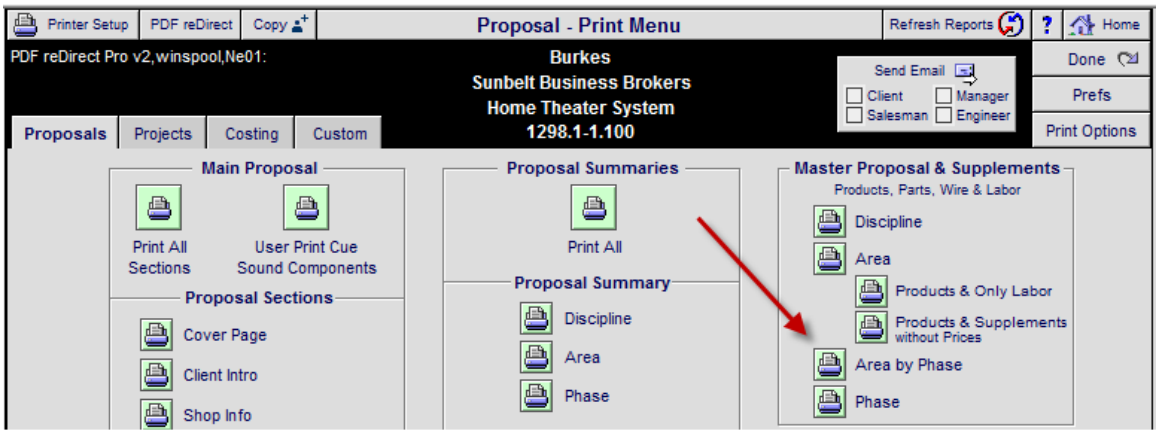


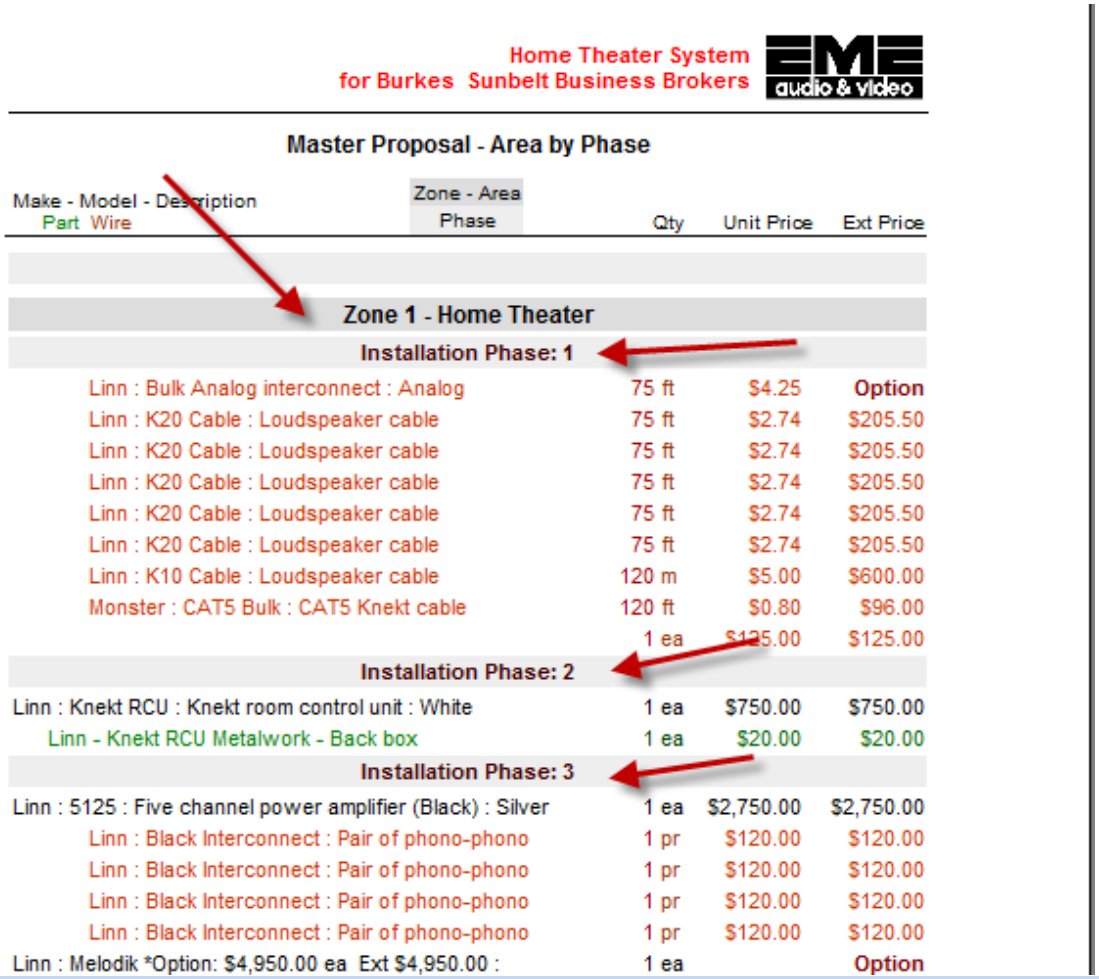
SCPS Version 10.3v1

Released: 7/22/2013

Enhancement – Proposal/Print Menu: Master Proposal-Area by Phase Report

A new Master Proposal report – Area by Phase has been added to the Print Menu. It breaks out Products & Supplements by Phase and displays them under each Zone-Area.





Home Theater System
for Burkes Sunbelt Business Brokers

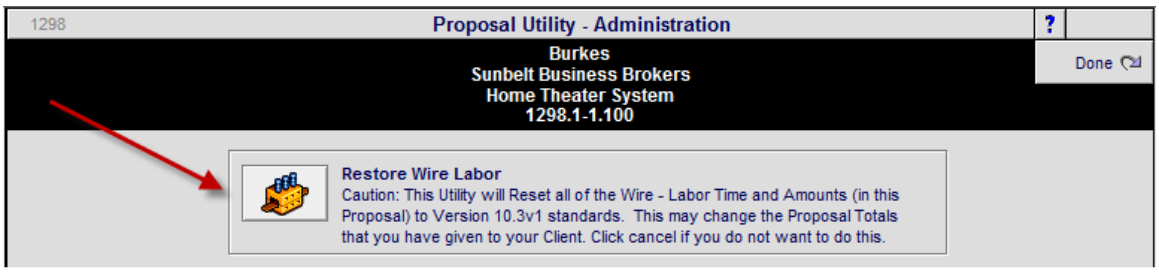
EME audio & video

Master Proposal - Area by Phase

Make - Model - Description / Part Wire	Zone - Area / Phase	Qty	Unit Price	Ext Price
Zone 1 - Home Theater				
Installation Phase: 1				
Linn : Bulk Analog interconnect : Analog		75 ft	$4.25	Option
Linn : K20 Cable : Loudspeaker cable		75 ft	$2.74	$205.50
Linn : K20 Cable : Loudspeaker cable		75 ft	$2.74	$205.50
Linn : K20 Cable : Loudspeaker cable		75 ft	$2.74	$205.50
Linn : K20 Cable : Loudspeaker cable		75 ft	$2.74	$205.50
Linn : K20 Cable : Loudspeaker cable		75 ft	$2.74	$205.50
Linn : K10 Cable : Loudspeaker cable		120 m	$5.00	$600.00
Monster : CAT5 Bulk : CAT5 Knekt cable		120 ft	$0.80	$96.00
		1 ea	$125.00	$125.00
Installation Phase: 2				
Linn : Knekt RCU : Knekt room control unit : White		1 ea	$750.00	$750.00
Linn - Knekt RCU Metalwork - Back box		1 ea	$20.00	$20.00
Installation Phase: 3				
Linn : 5125 : Five channel power amplifier (Black) : Silver		1 ea	$2,750.00	$2,750.00
Linn : Black Interconnect : Pair of phono-phono		1 pr	$120.00	$120.00
Linn : Black Interconnect : Pair of phono-phono		1 pr	$120.00	$120.00
Linn : Black Interconnect : Pair of phono-phono		1 pr	$120.00	$120.00
Linn : Black Interconnect : Pair of phono-phono		1 pr	$120.00	$120.00
Linn : Melodik *Option: $4,950.00 ea Ext $4,950.00 :		1 ea		Option

Enhancement – All Entities/Utility/Admin: Restore All Wire Labor to 10.3v1 standards

All of the Wire Supplement Labor Time and Amounts can be Restored to 10.3v1 standards in Proposals, Projects, Pending and Final Change Orders, by users with Administration Rights. This can be done from the Utility Admin screen in your Proposals, Projects, Pending and Final Change Orders.

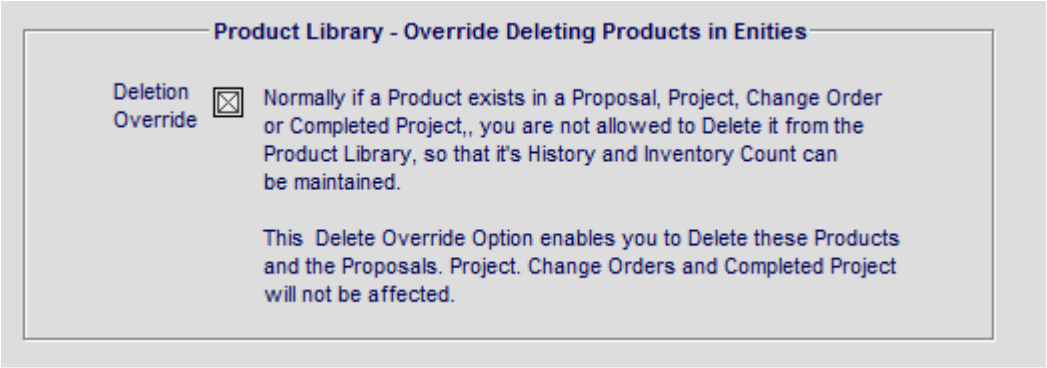


Enhancement – All Modules: Speed Up Entering Entity List screens

Removing the Hide Text Ruler process prevents List screens from refreshing a second time and speeds up navigation. The Text Ruler is hidden during the initial log in process. Also going into Proposals and Projects has been improved by going to the Fast Dev screen first. (Main, Products, Sets, Text, Tasks, POS)

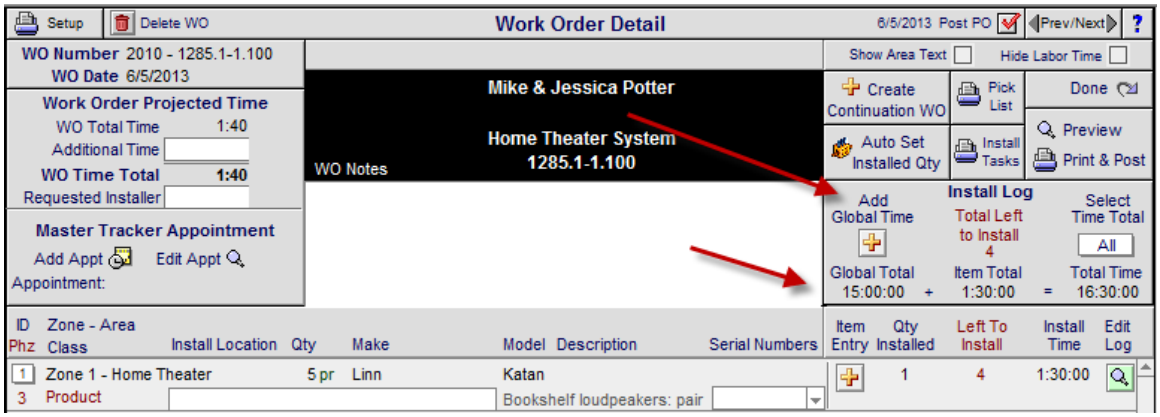
Enhancement – Master Preferences/Other/Products 1

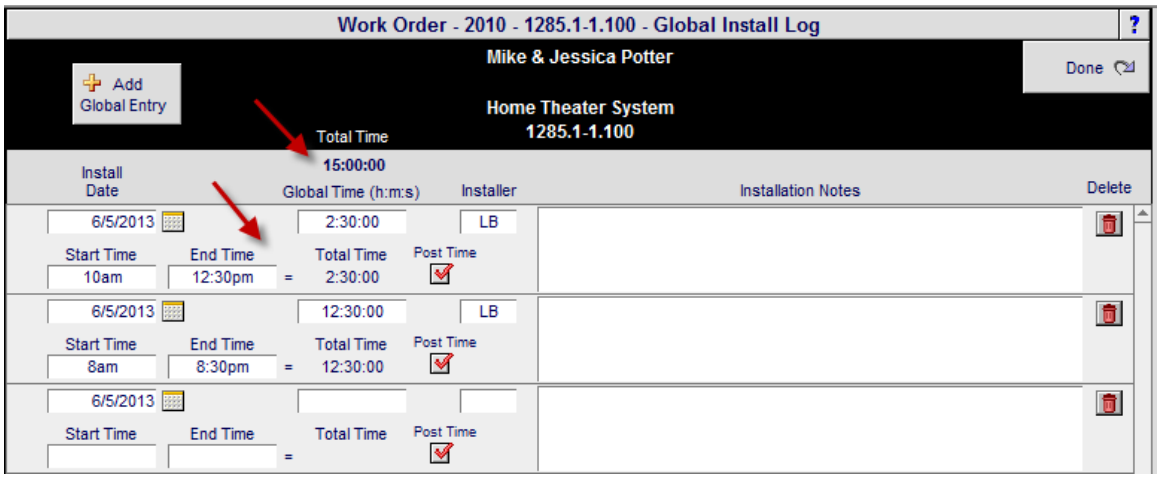
You can now Override the feature that prevents you from Deleting Products in the Product Library that Exist in Proposals and Projects.



Enhancement – Project/Work Order Detail: Global Time Start – End Calculator

You can now enter a Start Time and End Time in the Work Order and SCPS will calculate the Total Time for that Global Entry. The Total Global and Total Item Time is now shown on the WO Detail screen and you can Select the Time Total (All, Global, Item) you want to be reflected in the Global Project Manager for this Work Order.





Enhancement – Project/Install Work Order: Area Text Modification and Find Sort Features

You can now modify the Proposal Area Text and the Area Work Order Text directly from the Work Order Screen. Previously Proposal Area Text was not modifiable within a Project and you are notified of that this will change the Proposal document that the client has received.

You can also Find all of the Project Products by Zone Area or Discipline by clicking on the underlined Zone Area or Discipline on each Product. You can Sort by Phase, Zone-Area or Discipline by clicking on the underlined header titles.

Show All | Phase 1 | 2 | 3 | **Install Work Orders - All - 29 Products** | PO | WO | SI | ? | Home

Area Text | Wire Manager

John & Mary Smith

1284.1-1.100

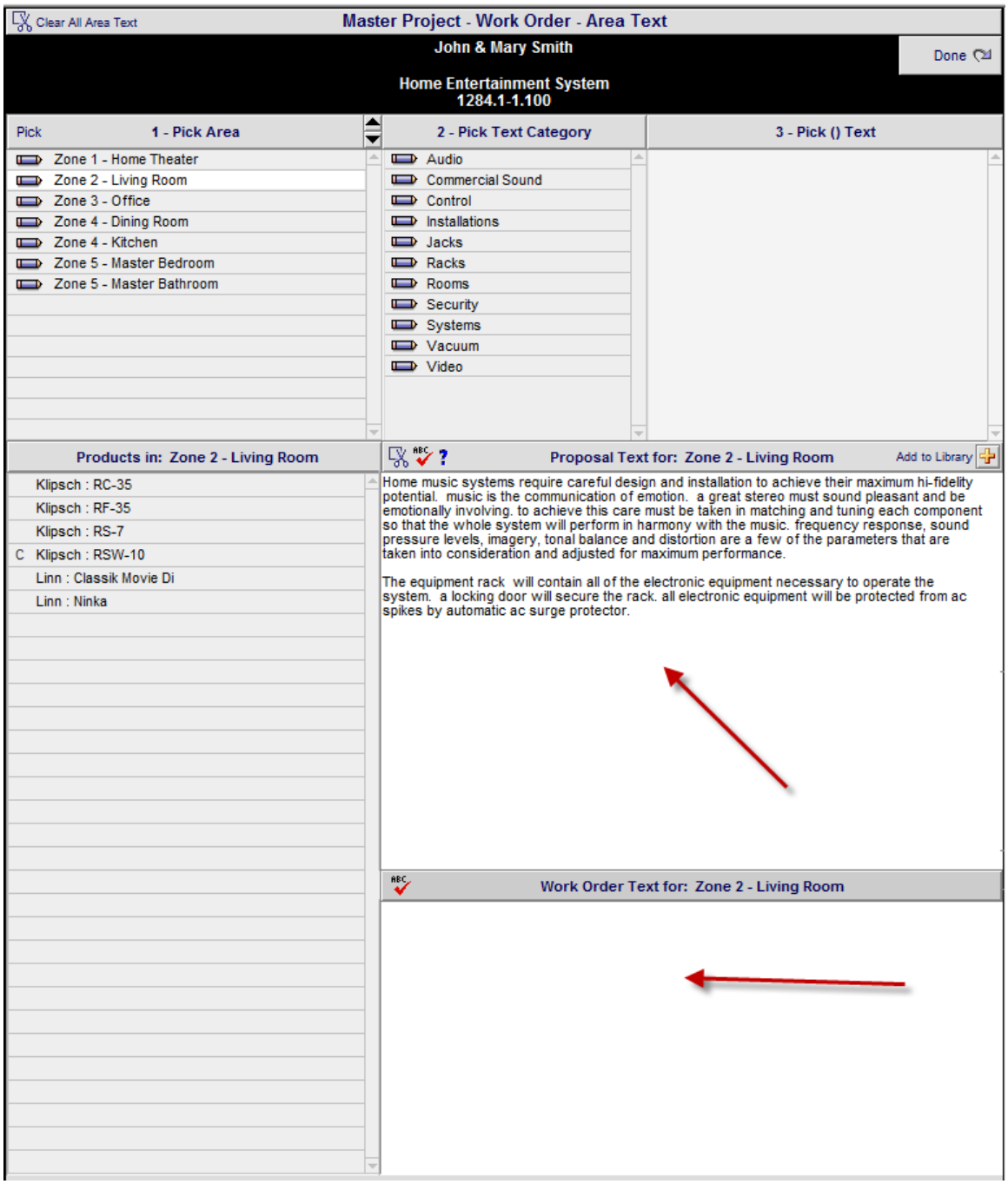
Labor Time Remaining on Project	
Project Time	74:40:00
Installed Time	0:00:00
Labor Time Left	74:40:00

Totals	Left To Install	Left to Complete
Products	2	35
Parts	0	17
Wire	0	2,735

Create WO | Leave | Auto Set Qty to Issue | View Work Orders

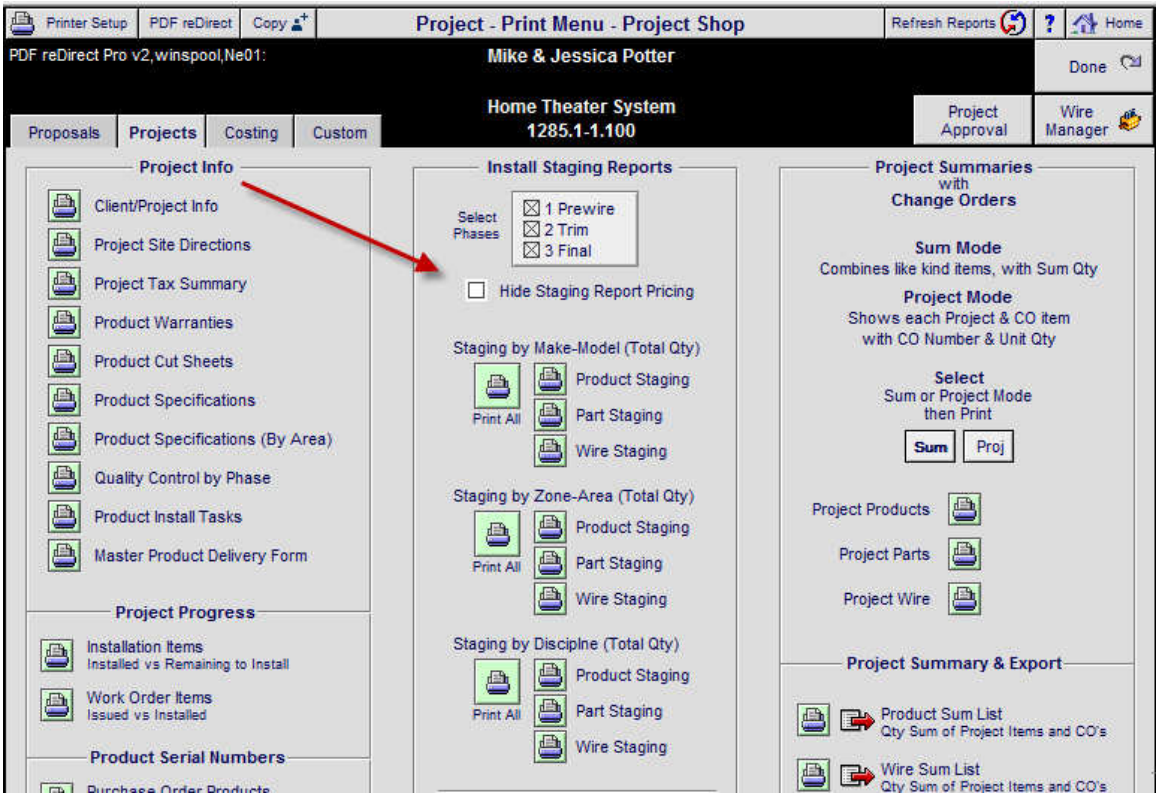
WO Products | WO Parts | WO Wire | Sum | Proj | Orphan

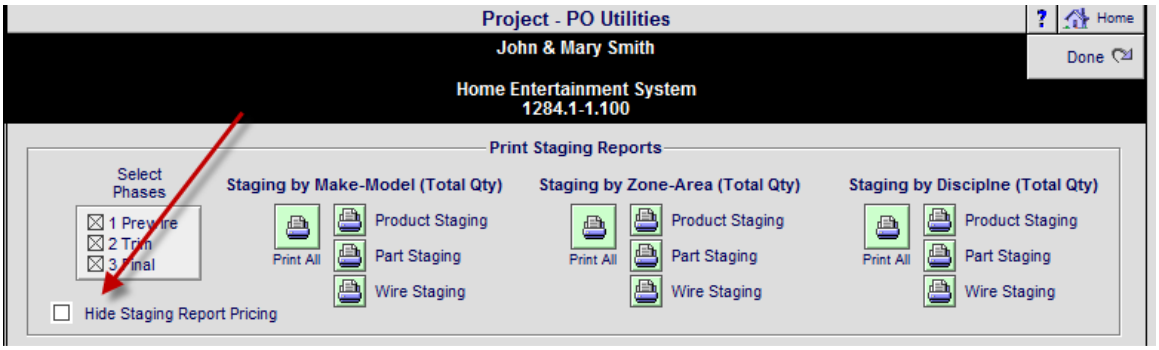
Phase	Zone - Area / Discipline	CO#	Qty Sold	Make : Model / Install Description	Finish	Left to Issue	Qty to Issue	WO's to Date: Qty Issued	Qty Installed	Total Time / Avg Time	Left to Install	Left to Complete
3	1 - Home Theater / Audio		1 ea	Linn : 5125 / Five channel power amplifier (Black)	Silver	1					0	1
3	1 - Home Theater / Audio		1 ea	Linn : Classik Music-S / Integrated CD player/tuner/preamp/power	Silver	1					0	1
3	1 - Home Theater / Audio		5 pr	Linn : Katan / Bookshelf loudpeakers: pair	Black	5					0	5
3	1 - Home Theater / Audio		1 ea	Linn : Klimax Chakra 500 / Klimax two-channel power amplifier	Silver	1					0	1
3	1 - Home Theater / Audio		2 ea	Linn : Melodik / Aktive isobarik bass extension	Black	2					0	2
3	1 - Home Theater / Video		1 ea	Runco : CL-610 / DLP Projector		1					0	1
3	1 - Home Theater / Video		1 ea	Sony : DVP-NS999ES / Progressive Scan DVD Player	Black	1					0	1
3	1 - Home Theater / Automation		1 ea	Linn : 5101 Personal Handset / Universal learning remote	Black	1					0	1
2	1 - Home Theater / Automation		1 ea	Linn : Knekt RCU / Knekt room control unit	White	1					0	1



Enhancement – Project/Print Menu/Projects & PO/PO Utilities: Hide Staging Report Pricing

You can now choose to remove all Pricing from the Install Staging Reports and the Purchase Order Staging Reports





Enhancement – POS/PO: Reference 2, Field Added

An additional Reference Field has been added to the POS Purchase Order and to the POS Find Invoice screen.

Print Setup | Delete PO | Duplicate PO | **POS - Purchase Order** | Home

Print | Store Copy | Preview

CLOSED
PO #7196
1 of 1

Set Up | Done | Prev | Next

Vendor:

Paul Klipsch
Klipsch Audio Technologies
3746 Speaker Lane
Hope, AK 64763

Home 875-398-9965
Fax: 875-223-8575

Ship To: Shop Warehouse: Edit

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

4/25/2007
Closed
Need By

Buyer	Reference	Reference 2	Ship VIA	FOB	Terms
Joe Buyer					

Receive All

Pick	Qty	unit	Product Description (max 2 lines)	Unit Cost	Ext Cost	Qty Rcvd	Qty Open

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

Purchase Order
PO #7196
4/25/2007
Ship To:
Shop Warehouse:

Paul Klipsch
Klipsch Audio Technologies
3746 Speaker Lane
Hope, AK 64763

Home 875-398-9965
Fax: 875-223-8575

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

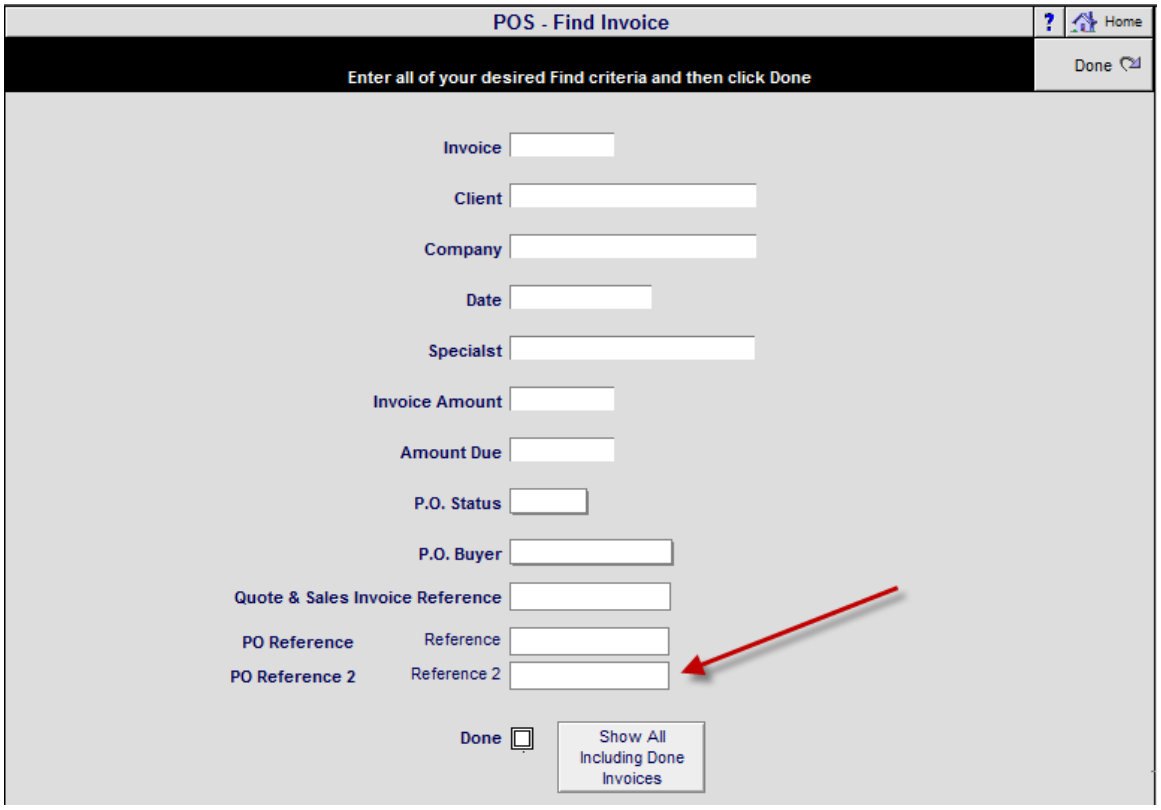
Buyer	Reference 2
Joe Buyer	

Qty	Description	Price	Total

Purchase Orders

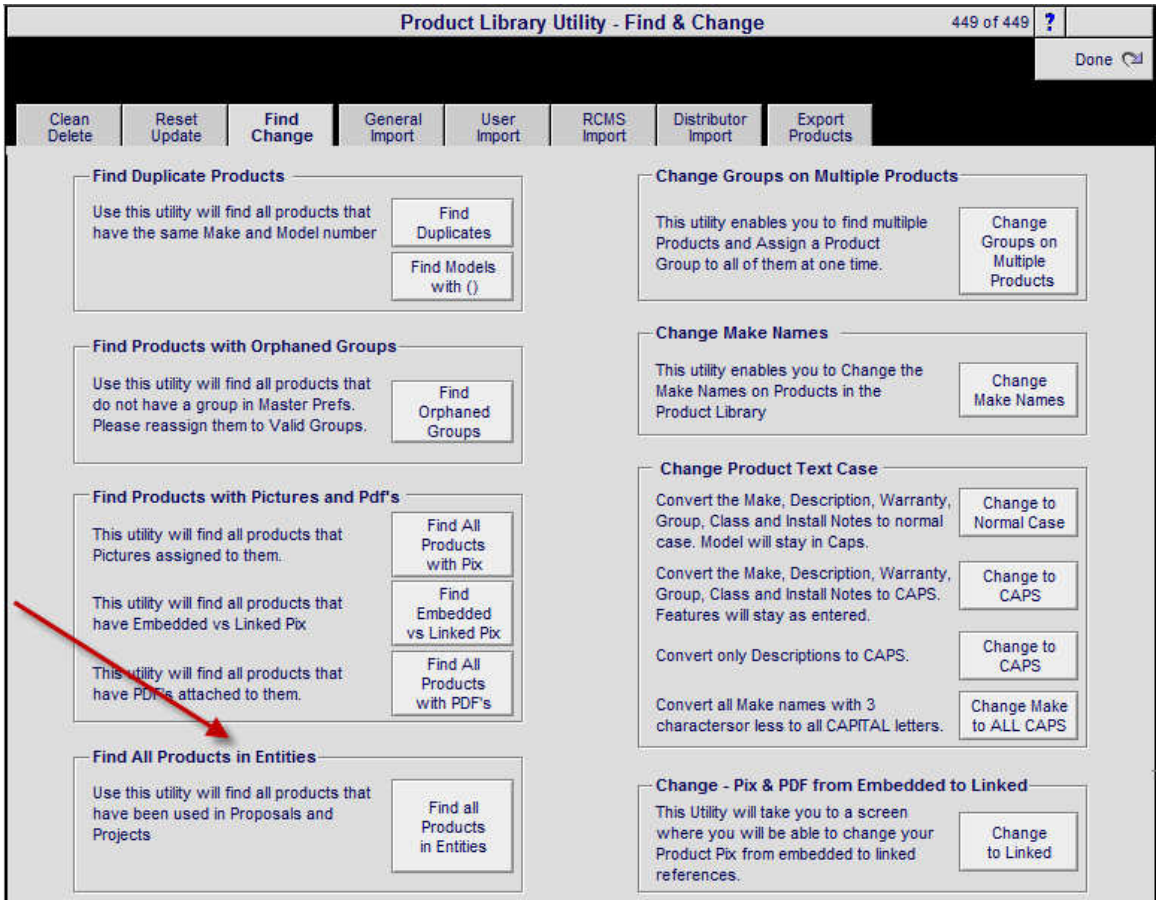
Purchase Order "Reference" field Label

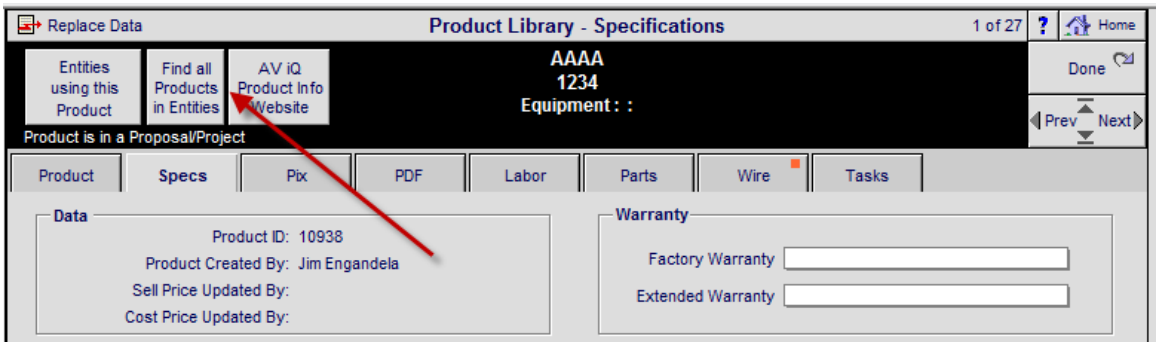
Purchase Order "Reference 2" field Label



Enhancement – Product Library/Utility/Find Change: Find all Products in Entities

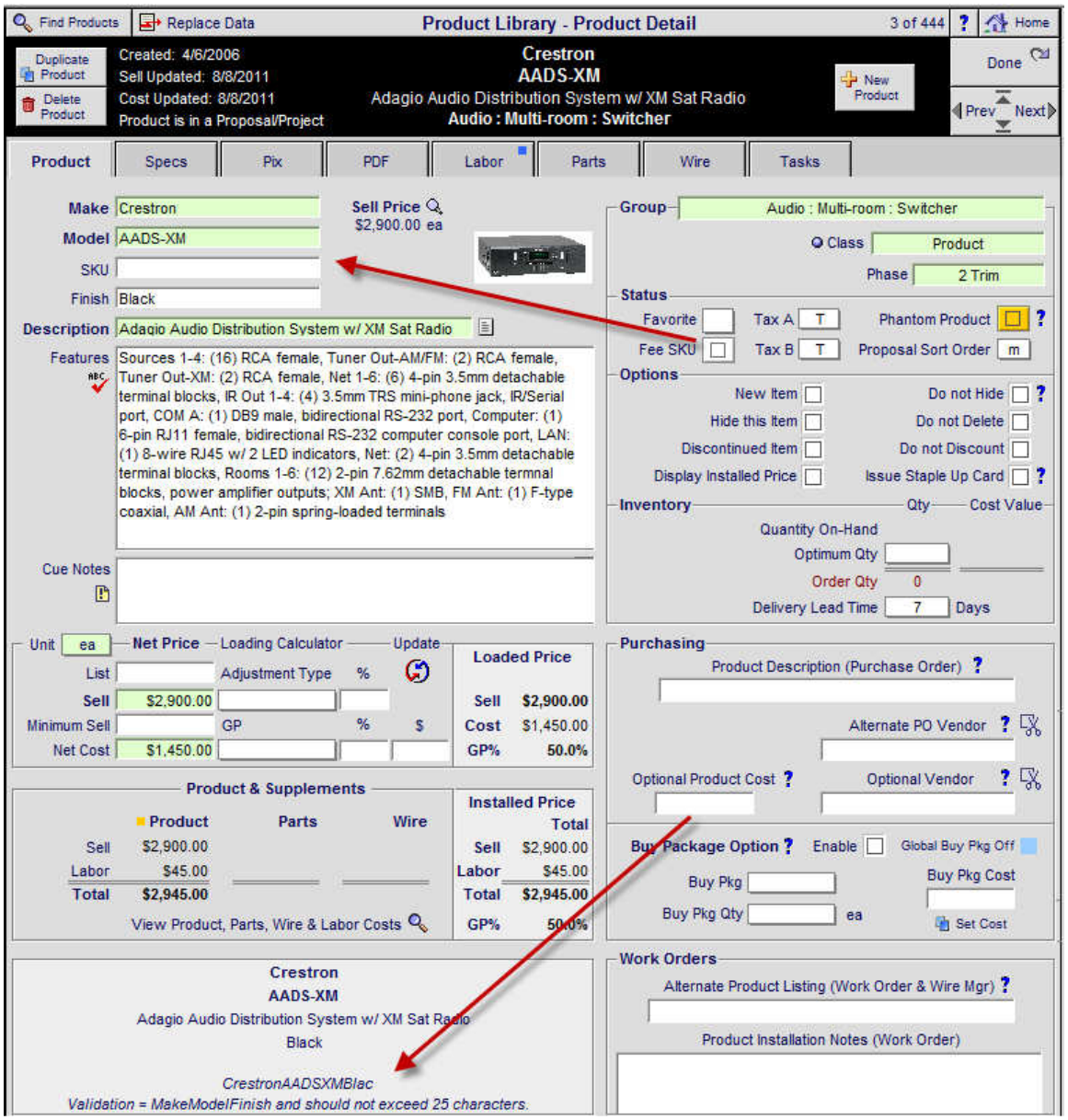
This Utility will find all Products in your Product Library that have been used in Proposals, Projects, Completed Projects and Change Orders.





Enhancement – Product Library/Product Detail: Improve Unique Validation Process

The formula that checks for duplicate products with the same Make and Model and Finish has been improved to make it more reliable.



Enhancement – Project/Work Order & POS: WO Service Tickets

This new module will enable you to create WO Service Tickets that are stored in the POS module. It is currently under development.

Delete WO | Work Order Detail | Printer Setup | Prev/Next | ?

Pick List | Install Tasks | Done

WO Number 2010 - 1285.1-1.100
WO Date 6/5/2013

Mike & Jessica Potter

Home Theater System
1285.1-1.100

6/5/2013 Post PO

Create Continuation WO | Show Area Text | Print & Post Work Order

Auto Set Installed Qty | Hide Labor Time | Preview

Work Order Projected Time
WO Total Time 13:45
Additional Time
WO Time Total 13:45
Requested Installer

New | WO Service Tickets | View

Master Tracker Appointment
Add Appt | Edit Appt
Appointment:

Add Global Time
Global Total 15:00:00 + Item Total 1:30:00 = Total Time 16:30:00

Install Log
Total Left to Install 4

Select Time Total
All

ID Phz	Zone - Area Class	Install Location	Qty	Make	Model	WO Notes Description	Serial Numbers	Item Entry	Qty Installed	Left To Install	Install Time	Edit Log
1	Zone 1 - Home Theater		5 pr	Linn	Katan				1	4	1:30:00	
3	Product					Bookshelf loudpeakers: pair						

Create a New POS Invoice | 7203 | ? | Home | Leave

EME audio & video

User: Jim Engandela
Location: 1 - EME Audio & Video

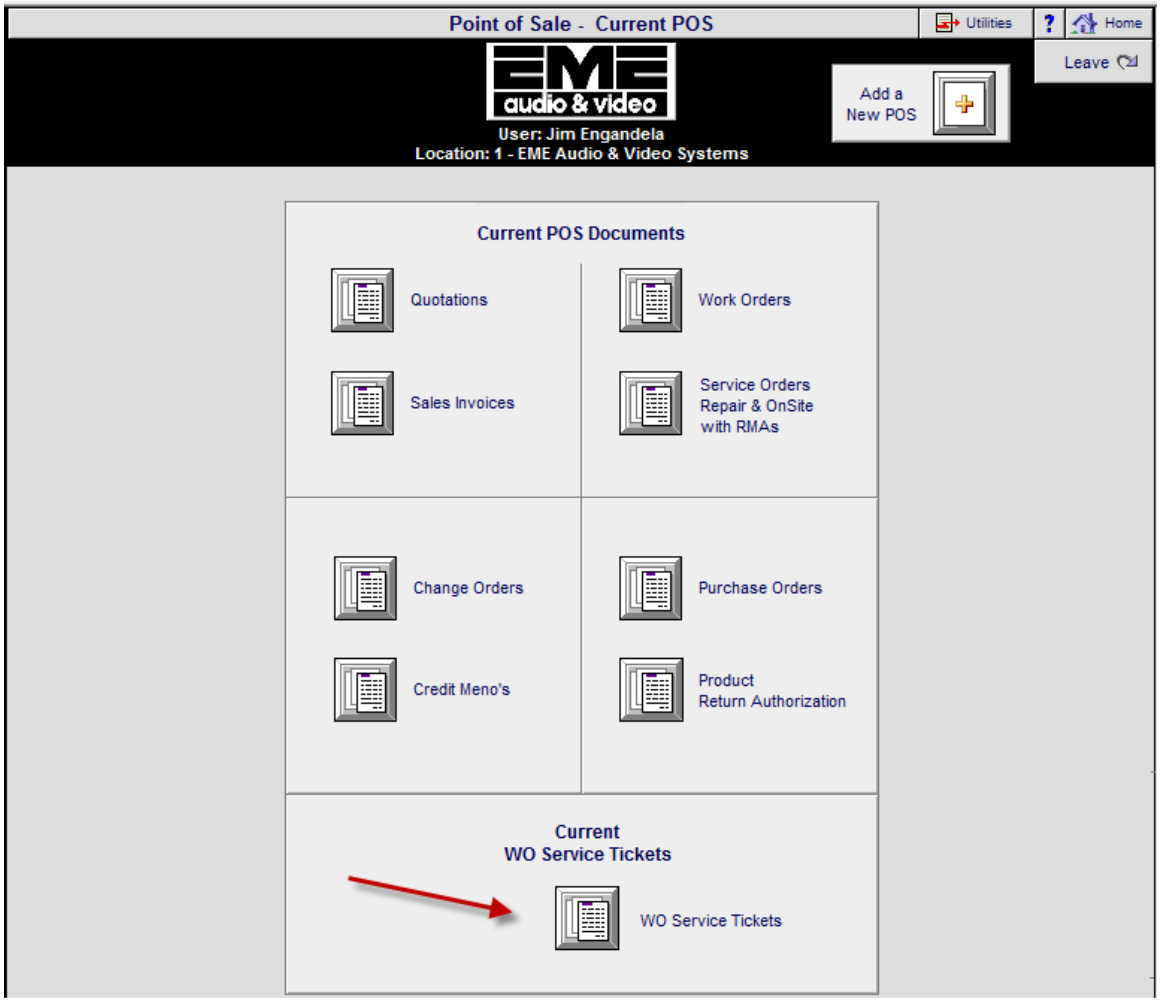
RON ADAM
RON ADAM INTERIOR DESIGN INC.
Switch Contact

Add New POS Invoice

Quotation | Work Order
Sales Invoice | Service Orders Repair & OnSite with RMAs
Change Order | Purchase Order
Credit Memo | Return Authorization

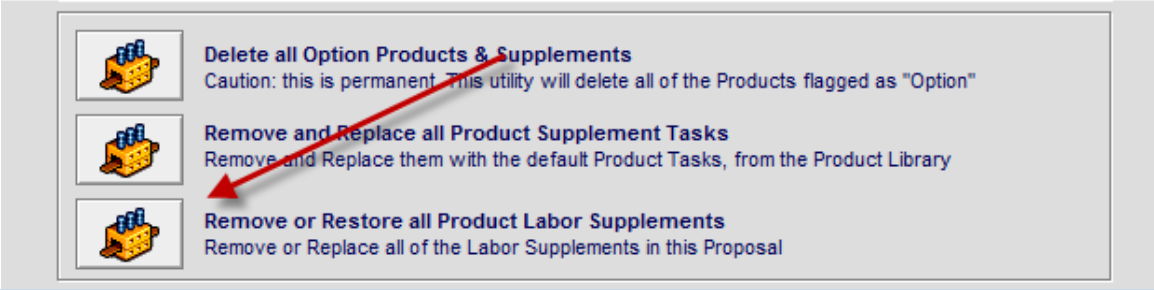
Add New WO Service Ticket

WO Service Ticket



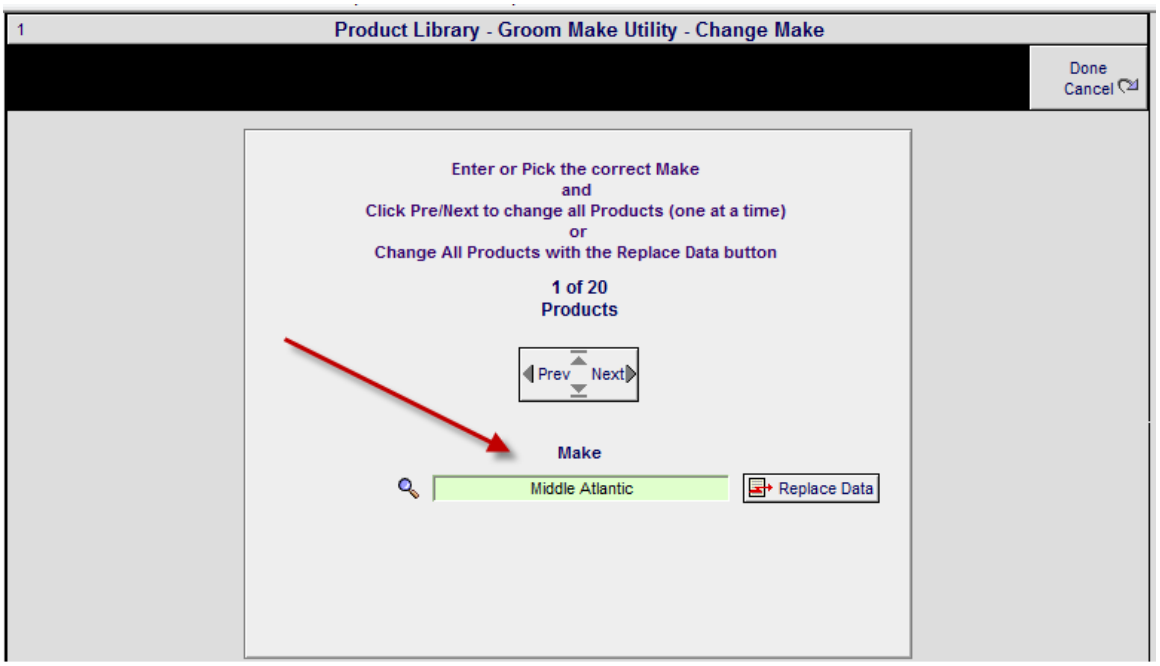
Fix – Proposal/Utility: Remove or Restore all Product Labor Supplements (Area Labor Totals)

This Utility Removes All Labor Supplements from your Proposal and zero's the Grand Total Labor. It now zero's the Area Labor Totals as well. Since this Utility does not Delete the labor records and they can be Restored if you wish. You can also Delete the Labor Supplement Records, by clicking on the Delete All Labor button on the Labor Supplement screen in your Proposal.



Fix – Product Library/Groom Make Utility: Remove Validation when changing Make name

Unique Validation on the Make field was preventing the Case of the Make name from being changed, because it appears to already exist in the Product Library. This has been corrected.

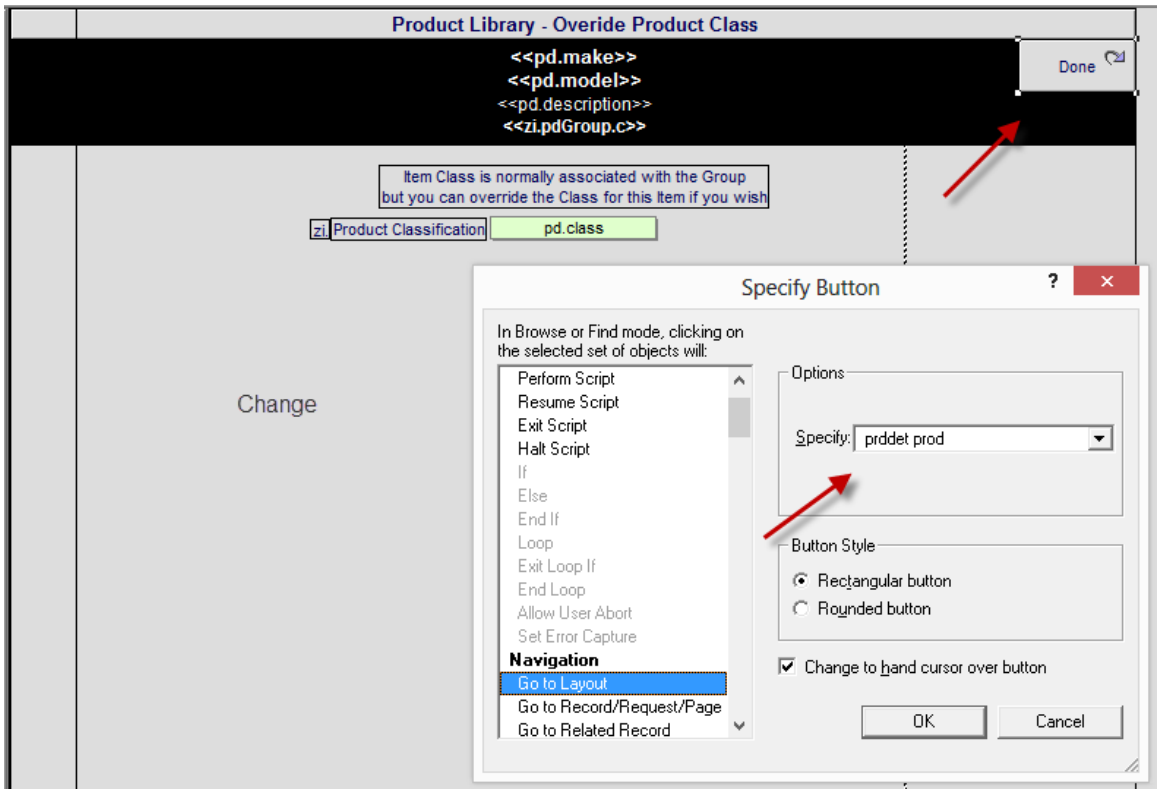


Fix – Proposal/Print Menu/Shop: Staging Reports Printing (Show All Records)

The Shop Report file Print script now defaults to Show All Records so that Reports show all records instead of one or script definitions.

Fix – Product Library/Change Product Class and retain Group Labor

If you manually Change the Product Classification on a Product from Product to Part or Wire, the Product Group and associated Group Labor was being deleted, which affects all other products in that Group. This has been corrected.



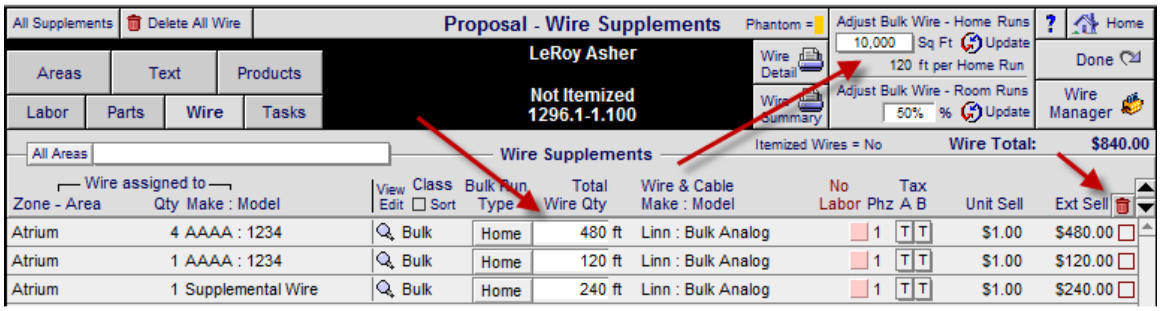
Fix – Master Preferences/Groups/Utility: Set Supplement files in Show All State after Delete

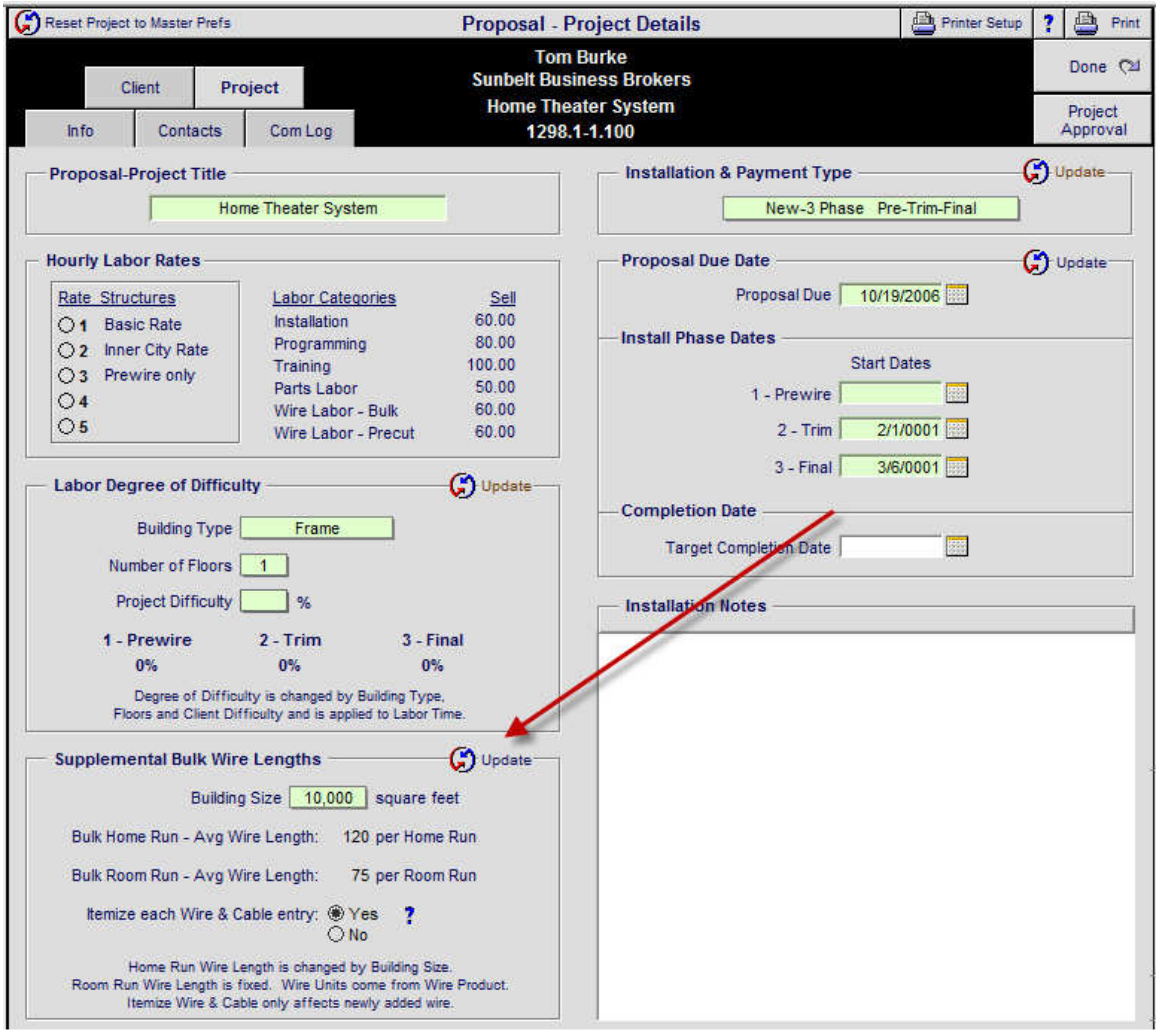
After running the Delete Orphaned Group Supplements the Supplement files are left in the Show All Records state. This script addition is done for all 4 Supplements. Labor, Parts, Wire and Tasks.

Fix – Proposal/Project & Wire Supplement screens: Automatic Bulk Wire Adjuster

Running (Updating) the Automatic Bulk Wire Adjuster now correctly produces the correct Labor for each individual wire and grand total for wire.

Deleting Wire now correctly produces the total Labor for the remaining wire.





Fix – Proposal/Product Detail/Wire Supplements: Fix Bulk Wire Numbers

If the Product Quantity is greater than 1, changing the Wire length produced the wrong Labor Amount. This has been corrected.

Adding additional Wires to a Product produced the wrong Labor on the additional wire. This has been corrected.

Changing the Phase on a wire now correctly moves the Wire Labor Totals to the right phase.

When adding Pure Wire Supplements Changing the Wire Quantity or Phase now produces the correct Wire Labor per wire and total.

Delete All Wire | Restore Wire Prices | **Proposal - Product Detail - Wire Supplements** | 1 of 2 | Restore Labor | ? | Home

Areas | Text | Products | Labor | Parts | Wire | Tasks

LeRoy Asher
1297.1-1.100
AAAA : 1234
Equipment : :

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

Proposal Detail | Prev | Next

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

Wire & Cable
for Product
Qty 4 ea

Wire & Cable are itemized
10,000 Sq Ft Building Size

Wire Make | Model | Add

Only products classified as "Wire" can be added

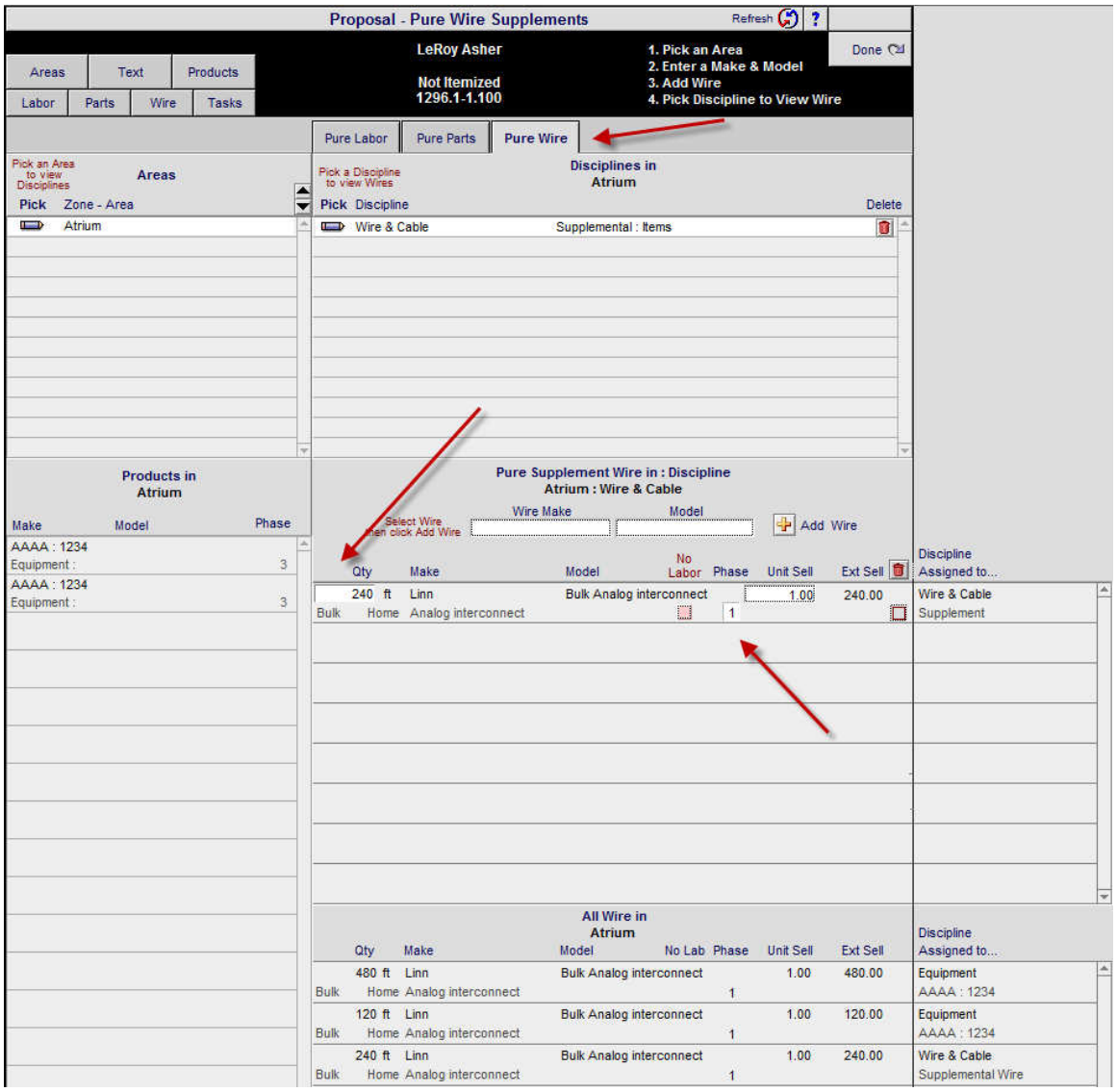
Class	Bulk Run Type	Total Wire Qty	Unit	Wire Make	Model/Description	No Labor	Install Phase	Labor Time Unit h:m:s	Labor Time Total h:m:s	Unit Cost	Unit Sell	Ext Sell
Bulk	Home	120	ft	Linn	Bulk Analog interconnect		1	0:01:00	2:00:00	0.50	1.00	120.00
Bulk	Home	120	ft	Linn	Bulk Analog interconnect		1	0:01:00	2:00:00	0.50	1.00	120.00
Bulk	Home	120	ft	Linn	Bulk Analog interconnect		1	0:01:00	2:00:00	0.50	1.00	120.00
Bulk	Home	120	ft	Linn	Bulk Analog interconnect		1	0:01:00	2:00:00	0.50	1.00	120.00

Labor Time Total 8:00:00 Wire Ext Total: $480.00

Grand Total - Wire Labor
for Product
Qty 4 ea

Wire Labor Type	Hourly Rate Cost	Hourly Rate Sell	Total Labor Time Phz	Ext	+DOD	Total	Total Labor Cost Phz	Ext	+DOD	Total	Total Labor Sell Phz	Ext	+DOD	Total
Wire Labor - Bulk	$30.00	$60.00	1	8:00:00	0%	8:00:00	1	$240.00	0%	$240.00	1	$480.00	0%	$480.00
Default Unit Labor Time h:m:s	00:01:00		2	0:00:00	0%	0:00:00	2		0%		2		0%	
Default Home Run Wire Qty	120		3	0:00:00	0%	0:00:00	3		0%		3		0%	
Wire Labor - Bulk			Phase 1+2+3 - Total:			8:00:00				$240.00				$480.00
Wire Labor - Precut	$30.00	$60.00	1		0%		1		0%		1		0%	
Unit Labor Time h:m:s	0:05:00		2		0%		2		0%		2		0%	
			3		0%		3		0%		3		0%	
Wire Labor - Precut			Phase 1+2+3 - Total:											
Total - Bulk & Precut - Wire Labor - Phase 1+2+3 - Total:						8:00:00				$240.00				$480.00

Wire & Labor Total: $960.00

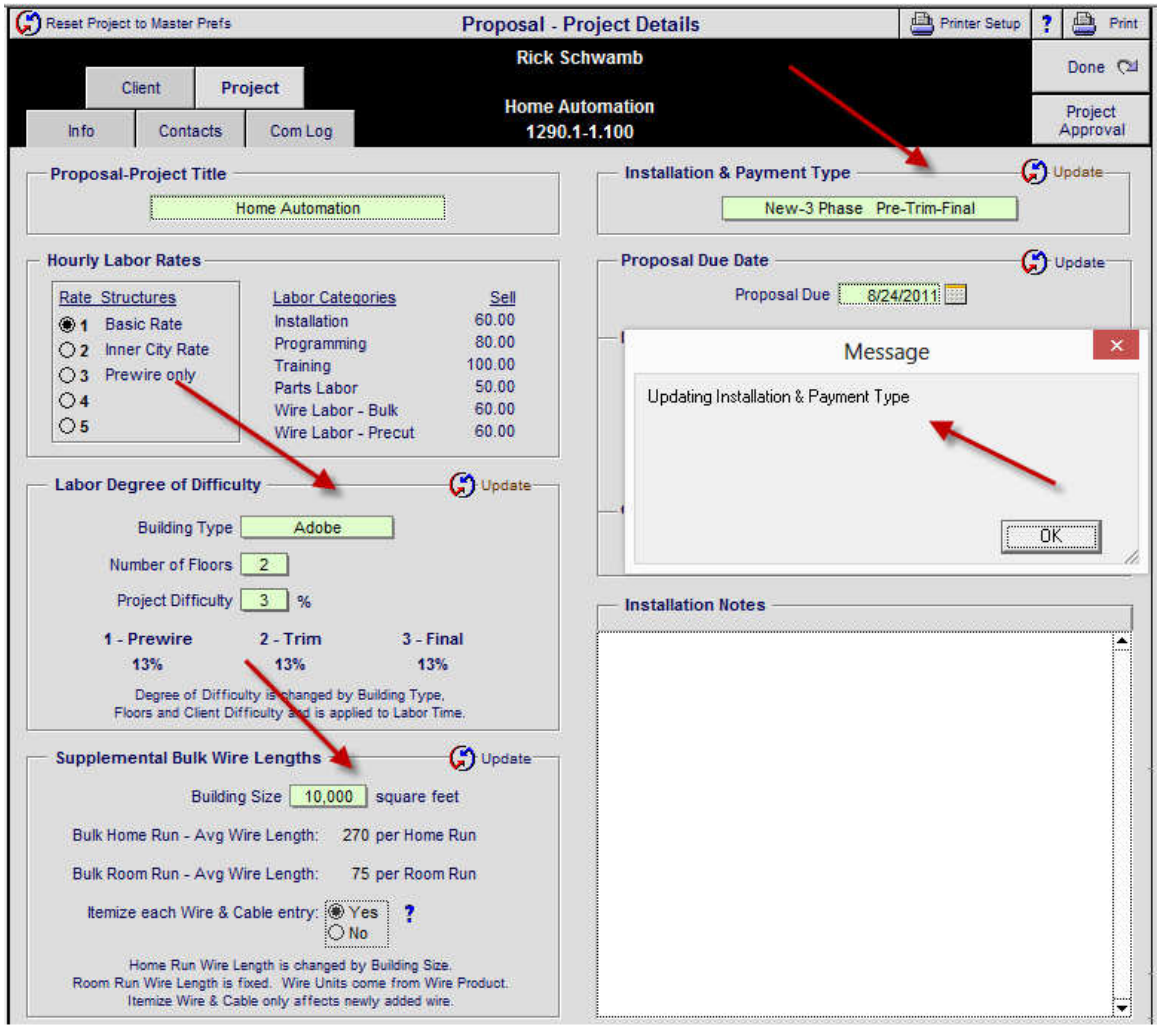


SCPS Version 10.2v1

Released: 5/29/2013

Enhancement – Proposal and Pending Change Order/Project Auto Update

If you change the **Install & Payment Type**, **Labor Degree of Difficulty** or **Supplemental Bulk Wire Length** settings, on the Proposal or Pending Change Order Project screen, the Update Utility will automatically, run when you leave that screen. This ensures that if a User changes any of these values that the Proposal or Pending Change Order is updated.



Enhancement – Proposal/Print Menu/Projects/Staging Reports: Hide Pricing

You can now choose to Show or Hide the Unit Cost and Sell prices on All of the Install Staging Reports. This option can me set in the Master Prefs/Proposals/Print Option screen as a default so that new proposal will automatically Hide the Prices.

Printer Setup | PDF reDirect | Copy | Proposal - Print Menu - Project Shop | Refresh Reports | ? | Home

PDF reDirect Pro v2,winspool,Ne01: | Rick Schwamb | Done

Home Automation
1290.1-1.100

Proposals | Projects | Costing | Custom | Project Approval | Wire Manager

Project Info

- Client/Project Info
- Project Site Directions
- Project Tax Summary
- Product Warranties
- Product Cut Sheets
- Product Specifications
- Product Specifications (By Area)
- 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

Install Staging Reports

Select Phases: ☒ 1 Prewire ☒ 2 Trim ☒ 3 Final

☒ Hide Staging Report Pricing

Staging by Make-Model (Total Qty): Print All | Product Staging | Part Staging | Wire Staging

Staging by Zone-Area (Total Qty): Print All | Product Staging | Part Staging | Wire Staging

Staging by Discipline (Total Qty): Print All | Product Staging | Part Staging | Wire Staging

Project Summaries with Change Orders

Sum Mode
Combines like kind items, with Sum Qty

Project Mode
Shows each Project & CO item with CO Number & Unit Qty

Select
Sum or Project Mode then Print

Sum | Proj

- Project Products
- Project Parts
- Project Wire

Project Summary & Export

- Product Sum List — Qty Sum of Project Items and CO's

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

PDF reDirect Pro v2,winspool,Ne01: | Done

Product : Ext Sell

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 Area by: Zone/Location/Placement/Area
  Normal Sort = Location/Zone/Placement/Area
- ☐ Hide Footer Initials

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

Product - "Line Listing"

A1 Make-Model-Description-Finish

Product - "Features Text"

- ( ) All ( ) Areas & Products Report
- ( ) None (•) Product Summary Report (recommended)

Product - "Pictures"

- ( ) All ( ) Areas & Products Report
- ( ) None (•) Product Summary Report (recommended)

Contract - "Subtotals"

5 Subtotals

5 Subtotals = All 5 Subtotals separate
3 Subtotals = 1 (Products), 2 (Parts + Wire), 3 (Labor + Fees)
2 Subtotals = 1 (Products + Parts + Wire), 2 (Labor + Fees)
1 Subtotal = Combines All and Shows only 1 Subtotal
Fees combined with Labor only show in the Contract

Contract - "Price Expiry Notice"

☐ Do not show Price Expiry Notice ☐ Do Not Show Date

Contract - "List Price & Price Discount"

(•) Yes ( ) No Show List Price & Discount

Contract - "Sales Tax"

(•) Yes ( ) No Show Sales Tax

AB Tax Show Tax Totals

Contract - "Warranty Terms"

( ) Factory (•) Extended Warranty Terms

Overviews - "Page Breaks"

☒ Page Break after each Overview

Fees Report - "Prices"

Show Fees Prices (•) Yes ( ) No
Show Fees Totals (•) Yes ( ) No

Labor Listing

- ☐ Do not show Labor Hours on Proposal Reports
- ☐ Do not show DOD on Labor Detail Report

Other

☐ Use Salesman's Email instead of Shop Email in Footer

Shop Reports

Staging Reports

☒ Hide Pricing on Shop Staging Reports

EME Audio & Video Systems - Confidential Report

5/28/2013 **Staging Document - Products** Page 1

Rick Schwamb
Home Automation
1290.1-1.100

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	Klipsch : RSW-10 : Black Ash	Order					
		Reference Subwoofer	Rc'vd					
		$525.00 $1,000.00	Stock					
			Delivered					
		#						
1 Prewire	1 ea	Middle Atlantic : ASR-42-HD : ASR-42-HD : Black	Order					
		6 shelf adjustable slide out rotating	Rc'vd					
		$720.00 $1,050.00	Stock					
			Delivered					
		#						
2 Trim	1 ea	Sonance : CR801 : 91807	Order					
		8" In-Ceiling CR801 Speaker	Rc'vd					
		$75.00 $162.50	Stock					
			Delivered					
		#						

EME Audio & Video Systems - Confidential Report

5/28/2013 **Staging Document - Products** Page 1

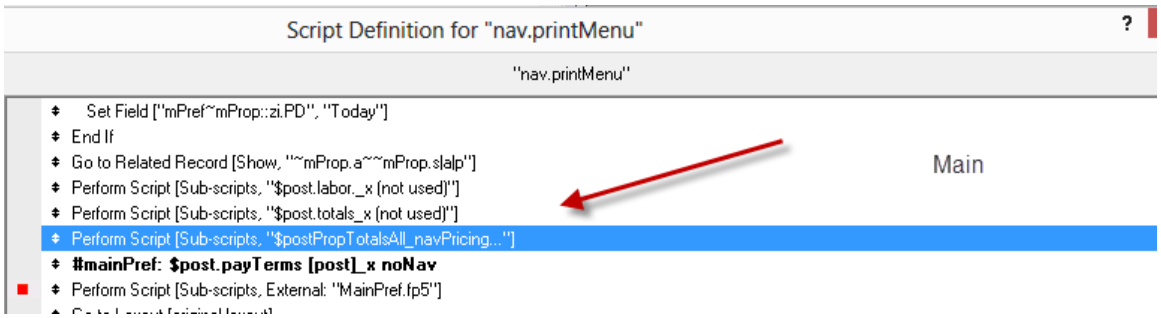
Rick Schwamb
Home Automation
1290.1-1.100

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	Klipsch : RSW-10 : Black Ash	Order					
		Reference Subwoofer	Rc'vd					
			Stock					
			Delivered					
		#						
1 Prewire	1 ea	Middle Atlantic : ASR-42-HD : ASR-42-HD : Black	Order					
		6 shelf adjustable slide out rotating	Rc'vd					
			Stock					
			Delivered					
		#						
2 Trim	1 ea	Sonance : CR801 : 91807	Order					
		8" In-Ceiling CR801 Speaker	Rc'vd					
			Stock					
			Delivered					
		#						

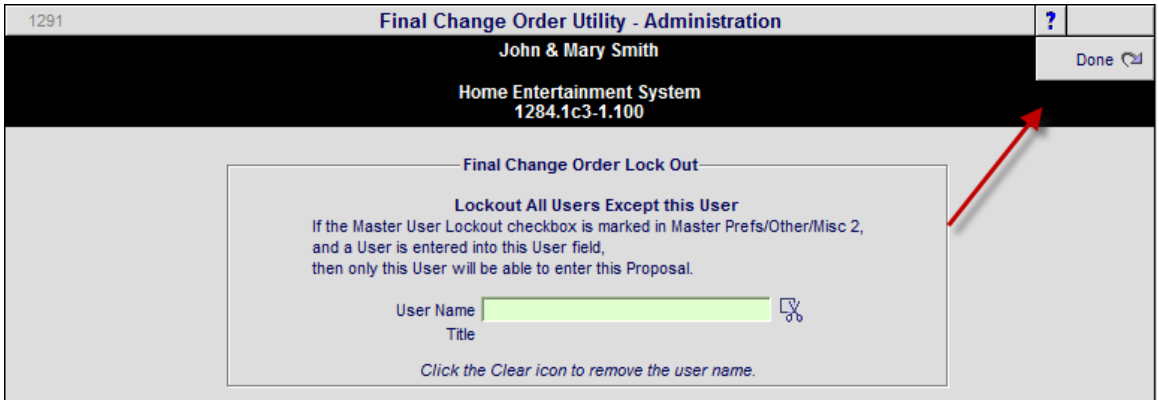
Enhancement – Proposal-Project/Print Menu: Post Totals

When entering the Print Menu we now report all of the totals to insure that any changes made to the Proposal are reflected in the reports.



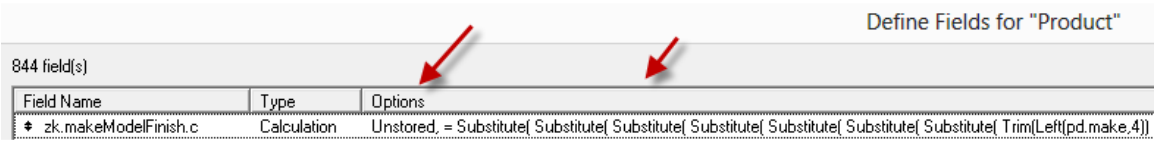
Enhancement – Pendng & Final Change Order/Utility/Admin: Remove processing on Done

When leaving the Pending and Final Change Orders/Utility/Admin screen you no longer have to wait for the processing which updates the Proposal numbers.



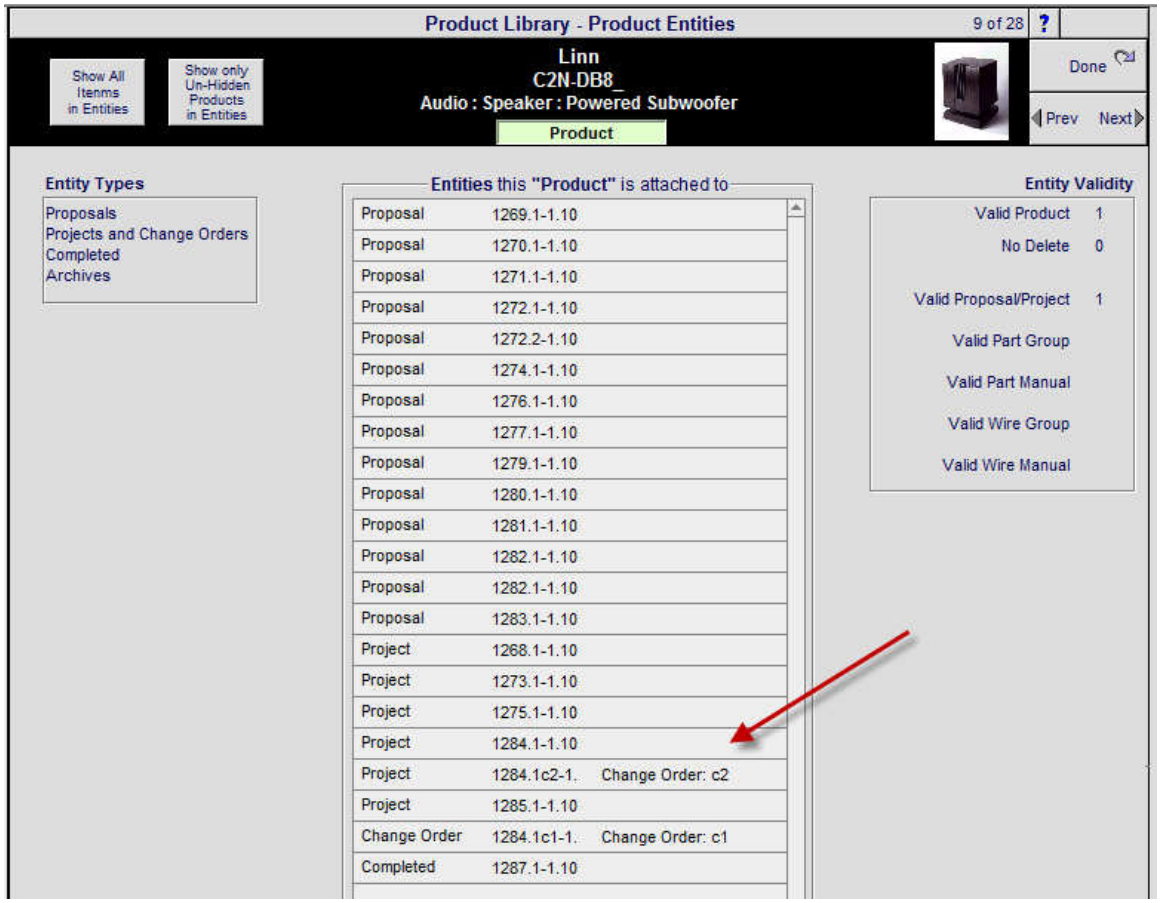
Enhanement – Product Library: Improve Product Validation

Change Validation calc. Increase characters and remove carriage returns
zk.makeModelFinish.c



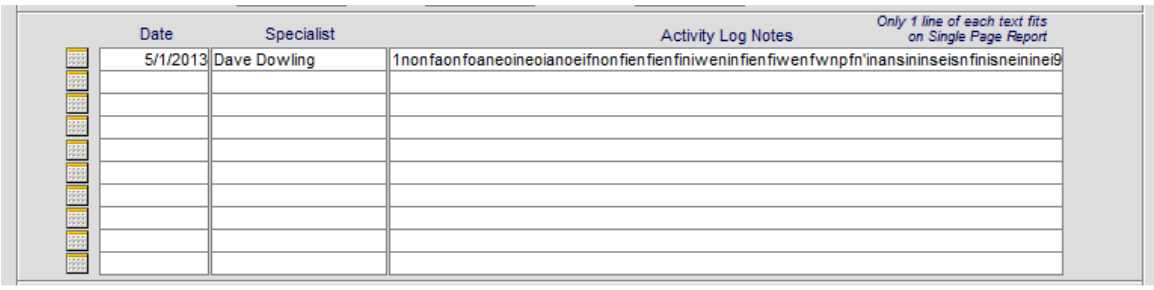
Enhancement – Product Library/Product Entities: Add Change Order Indicator

If a Product in the Product Library exists in a Change Order it is now indicated.



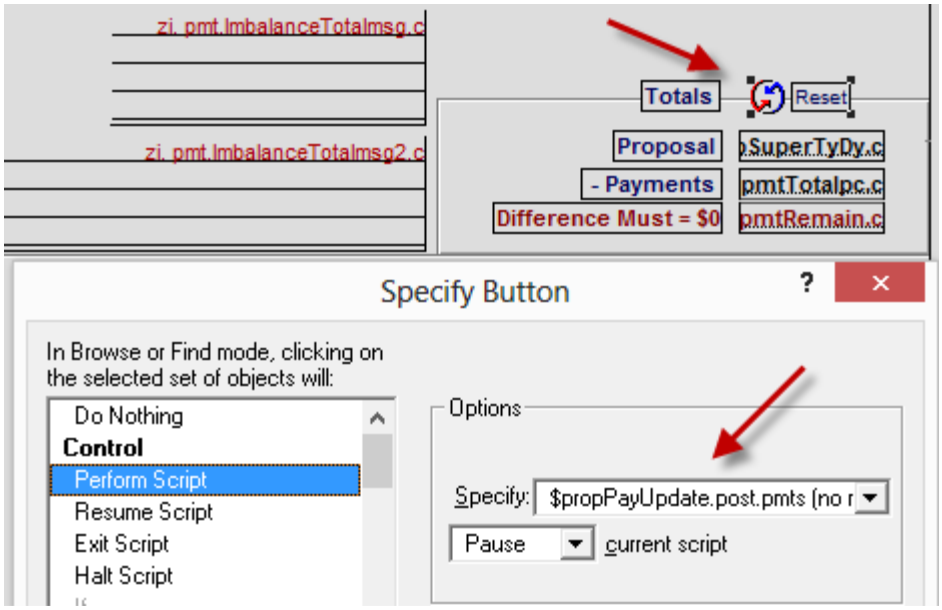
Enhancement – POS Service Order: Add Activity Log section to Printed SO Invoice

The Activity Log Notes section of the Service Order has been added to both the Single page and 3 page Service Order Invoice print out. The single page invoice will display a single line for each log line and the 3 Page invoice will display 2 lines for each log line if data is entered.



Fix – Proposal-Project/Payments: Update Payment Amount Reset

The payment amount reset is now separate from the complete Installation Type reset, so there is no change in the impact on labor that the Install Type reset has on your proposal.

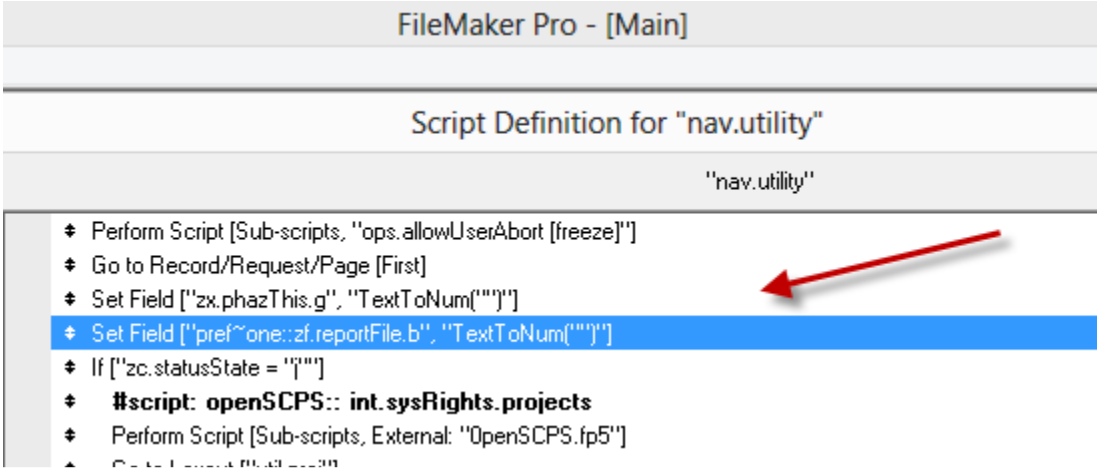


Fix – Proposal-Project: Wire Manager: Remove script messages

Unnecessary script messages have been removed from the updating Wire lengths in the Wire Manager. [Wire file]

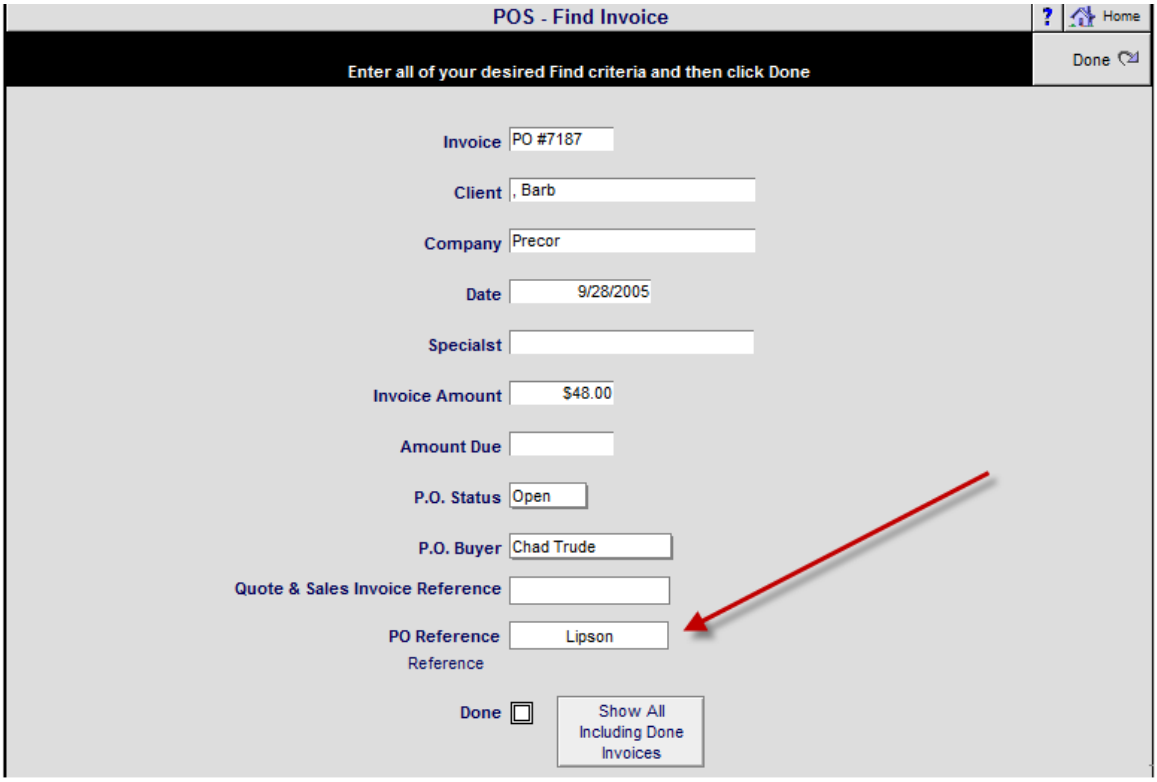
Fix – Proposal-Project/Utility/Export: Export instead of Print

Clear Pref Print Flag in Main Utility so that Export routines create Export files instead of Printing.



Fix – POS Find – Add PO Reference Field to Find Criteria

The Purchase Order Reference field (PO Reference) has been added to the Find Criteria, in addition to the Quote and Sales Invoice Reference field.

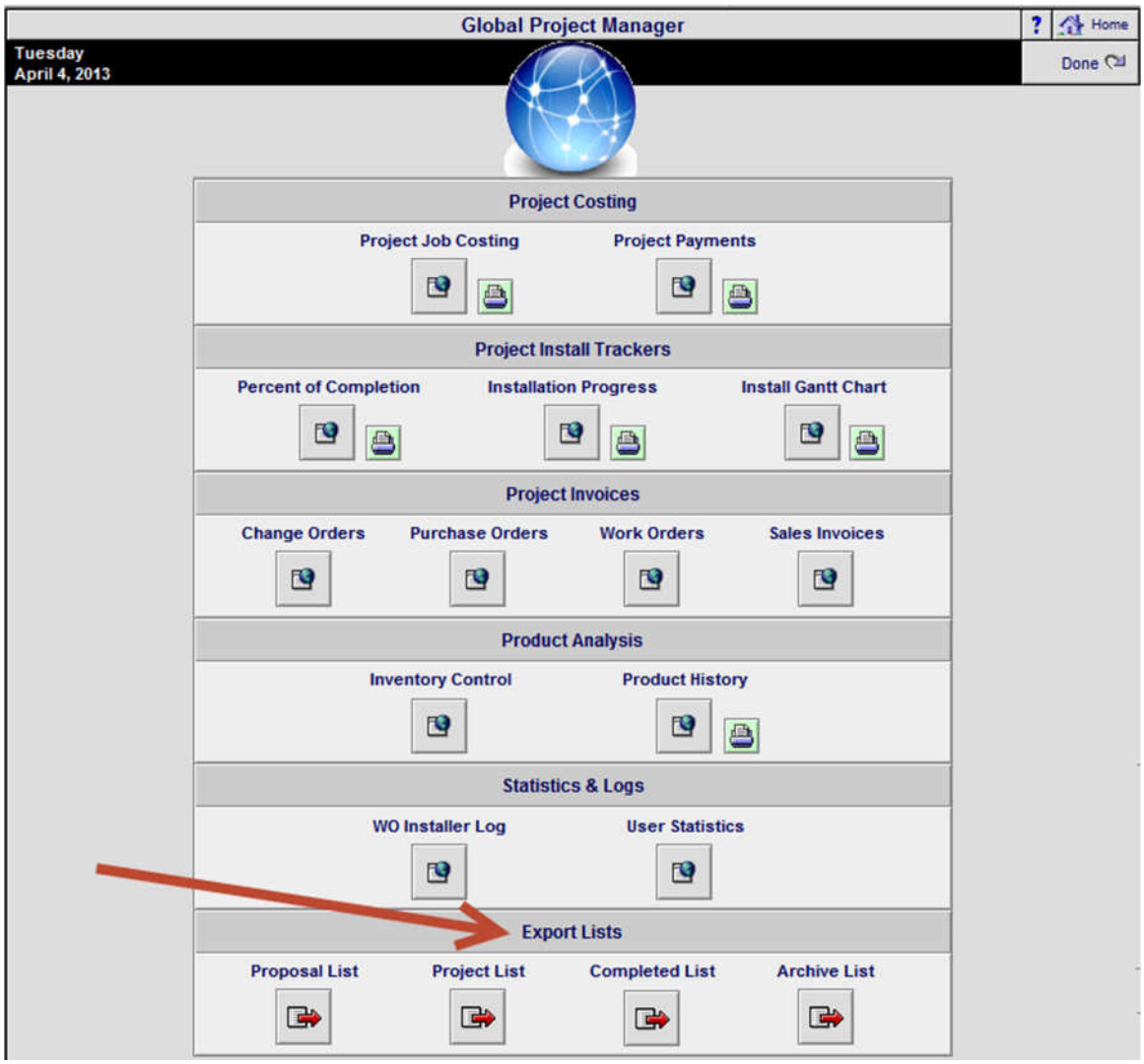


SCPS Version 10.1v1

Released: 4/24/2013

Enhancement – Main Logo Screen/Global Project Manager: Entity Export to Excel

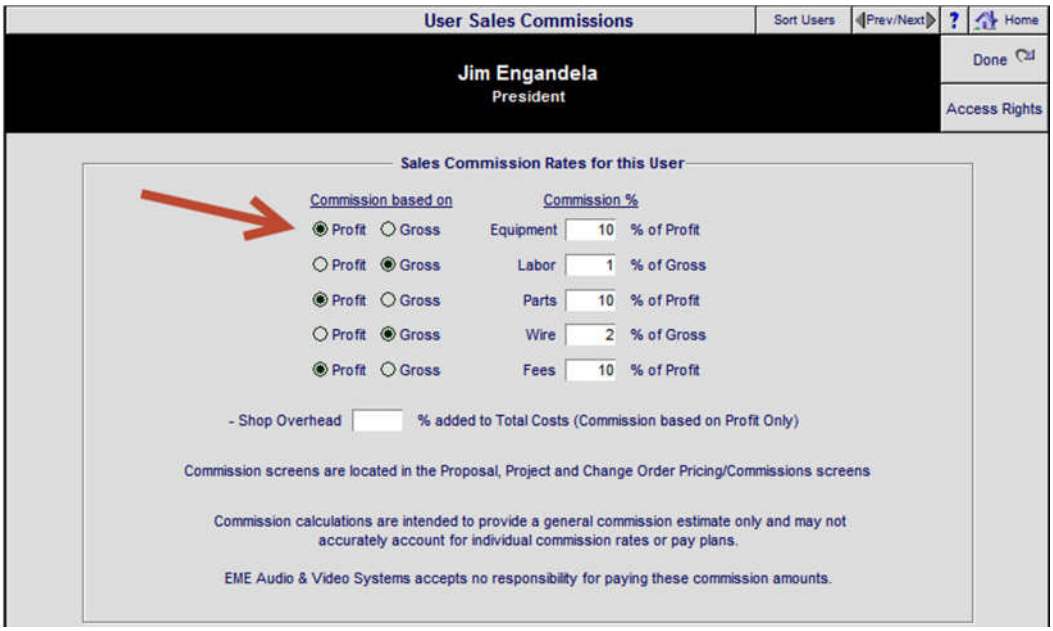
You can now export the Proposal, Project, Completed and Archive Lists to a file that can imported in Excel. These lists contain the Entity Number, Date, Total Amount, Salesman, Client/Company name, Address, City, State, Zip, Home & Work Phone and Email.

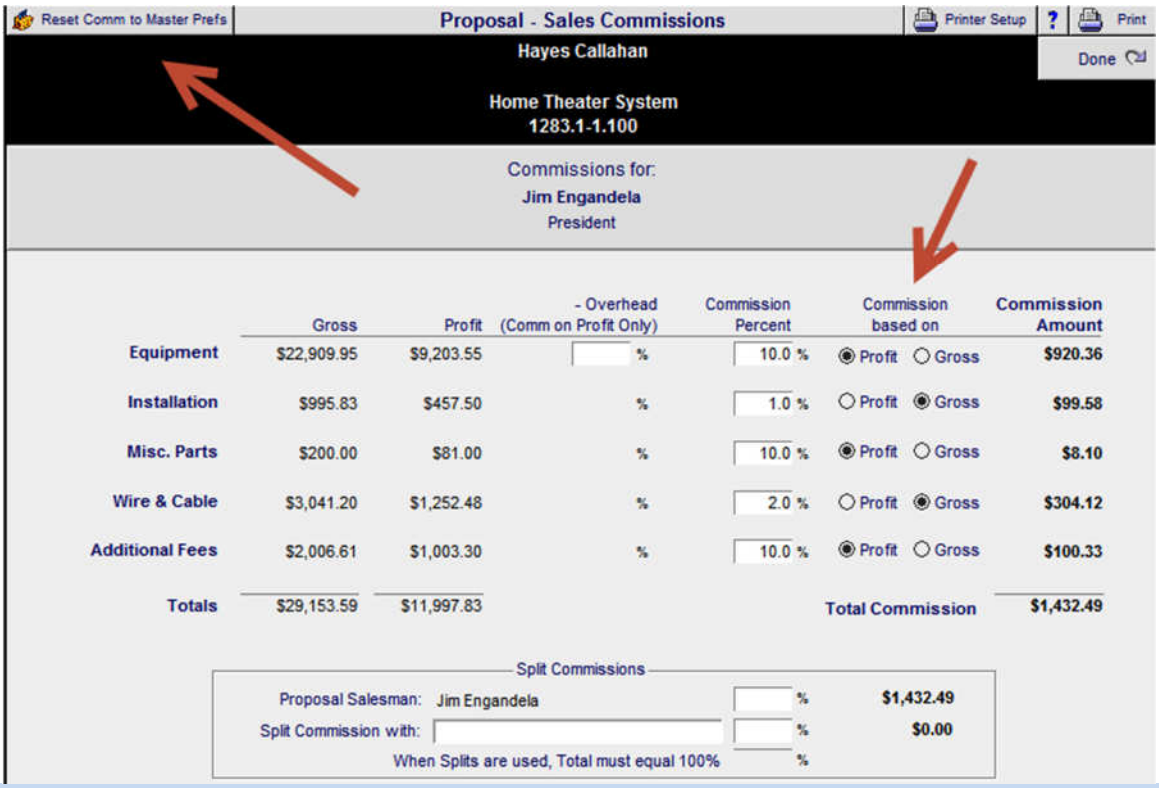


Enhancement – Master Prefs & Project Commissions based on Gross

You can now set the Users Commission schedule (Master Prefs/Users/Access Rights/Commissions), for each of the 5 subtotals, to either a percentage based on Gross or Profit.

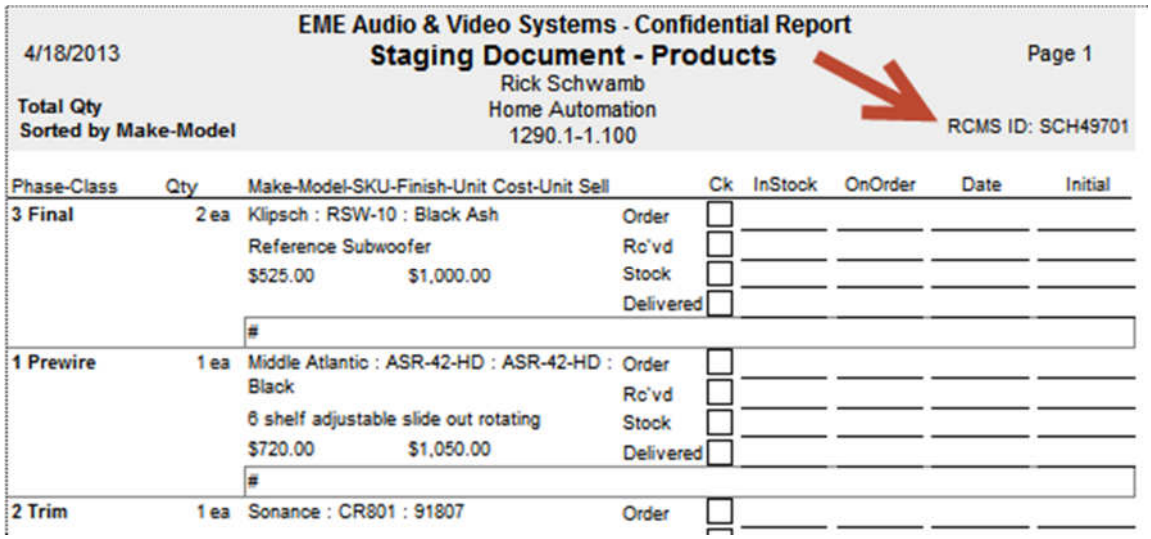
You can also update existing Commission schedules in a Project (Pricing/Commissions) to the current commission Master Prefs settings for the Salesman, using the Reset button.





Enhancement – Project/Print Menu/Shop: Staging Reports with RCMS Customer ID

The RCMS User ID has been added to the Staging Documents in the Proposal/Print Menu/Shop screen. This ID will only show if the RCMS Bookkeeping System is selected in the Master Prefs/Bookkeeping screen.



EME Audio & Video Systems - Confidential Report

4/18/2013 | Staging Document - Products | Page 1

Rick Schwamb
Home Automation
1290.1-1.100

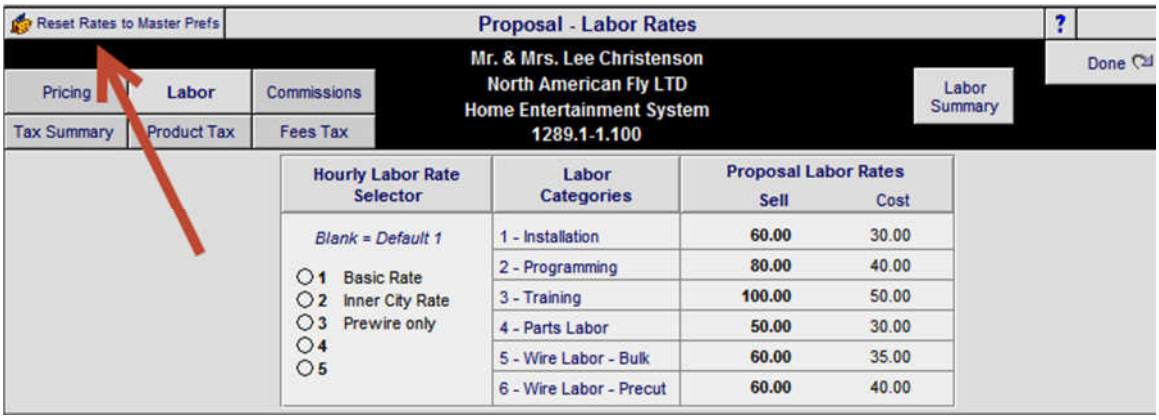
Total Qty
Sorted by Make-Model

RCMS ID: SCH49701

Phase-Class	Qty	Make-Model-SKU-Finish-Unit Cost-Unit Sell		Ck	InStock	OnOrder	Date	Initial
3 Final	2 ea	Klipsch : RSW-10 : Black Ash	Order					
		Reference Subwoofer	Rc'vd					
		$525.00 $1,000.00	Stock					
			Delivered					
		#						
1 Prewire	1 ea	Middle Atlantic : ASR-42-HD : ASR-42-HD : Black	Order					
			Rc'vd					
		6 shelf adjustable slide out rotating	Stock					
		$720.00 $1,050.00	Delivered					
		#						
2 Trim	1 ea	Sonance : CR801 : 91807	Order					

Enhancement – Proposal/Pricing/Labor: Reset Rates to Master Prefs, includes Phase Names

Updating a Proposal Labor Rate structure to the Master Preferences settings, now includes the User Phase Names as well as the Labor Rates.



Reset Rates to Master Prefs | Proposal - Labor Rates | ? | Done

Pricing | Labor | Commissions | Tax Summary | Product Tax | Fees Tax

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

Labor Summary

Hourly Labor Rate Selector

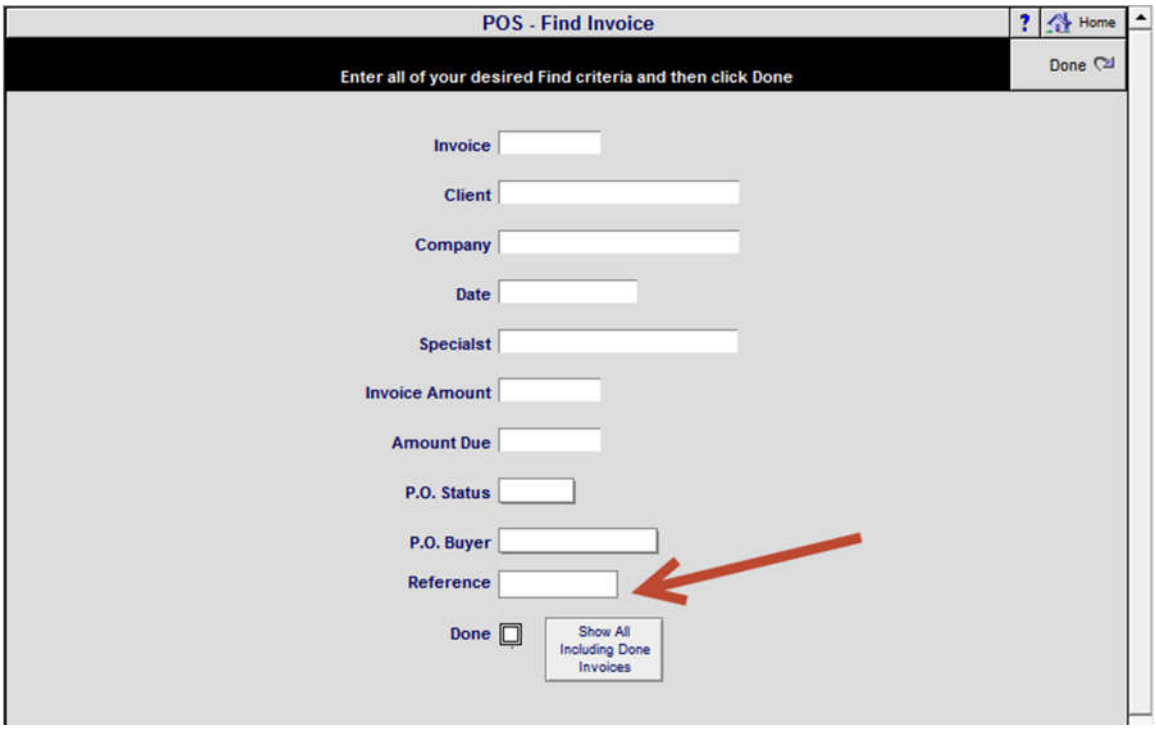
Blank = Default 1

- 1 Basic Rate
- 2 Inner City Rate
- 3 Prewire only
- 4
- 5

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

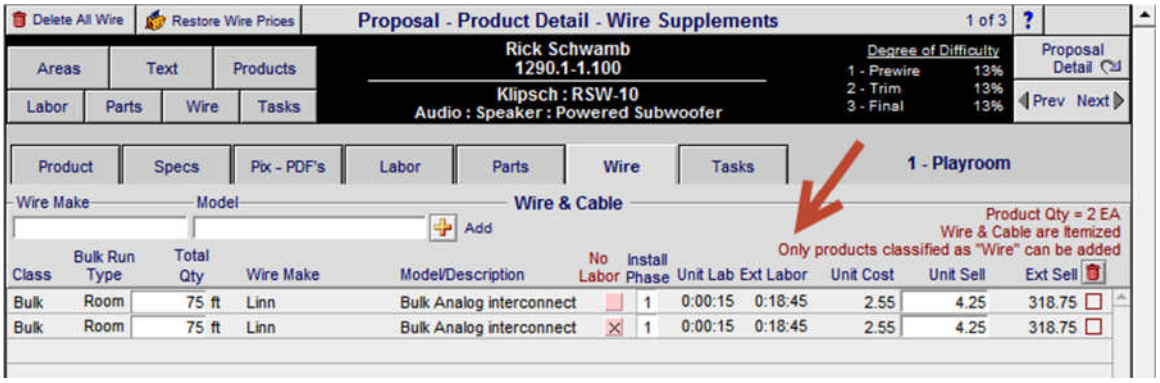
Enhancement – POS/Find Invoice: Add Reference to Find Criteria

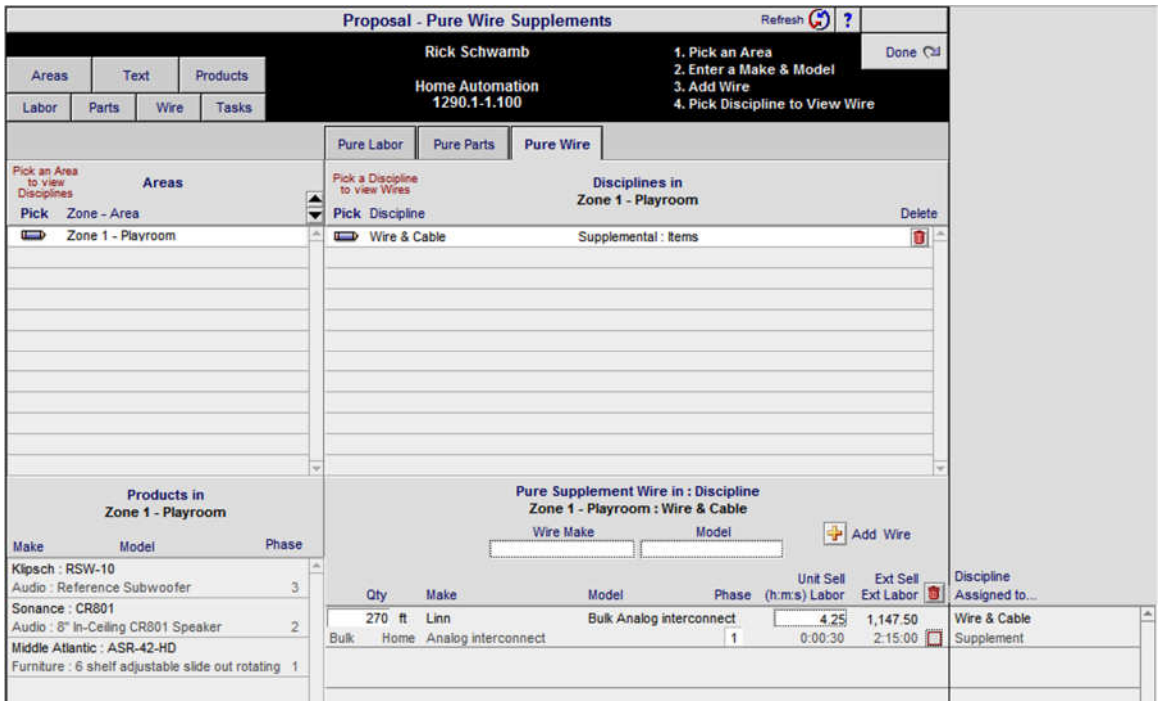
You can now search POS invoices by the Reference field as well as the other search fields.



Enhancement – Proposal/Labor, Parts and Wire Supplement screens: Improve GUI

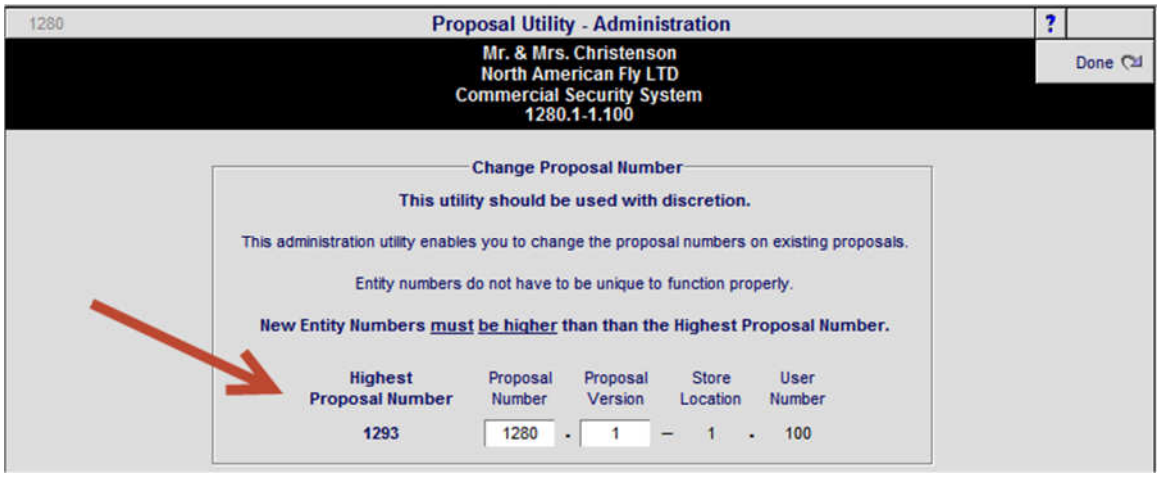
All 3 Regular Supplement and All 3 Pure Supplement screens for Labor, Parts and Wire, have been updated for better clarity and include Labor time on Parts and Wire Pure Supplements.





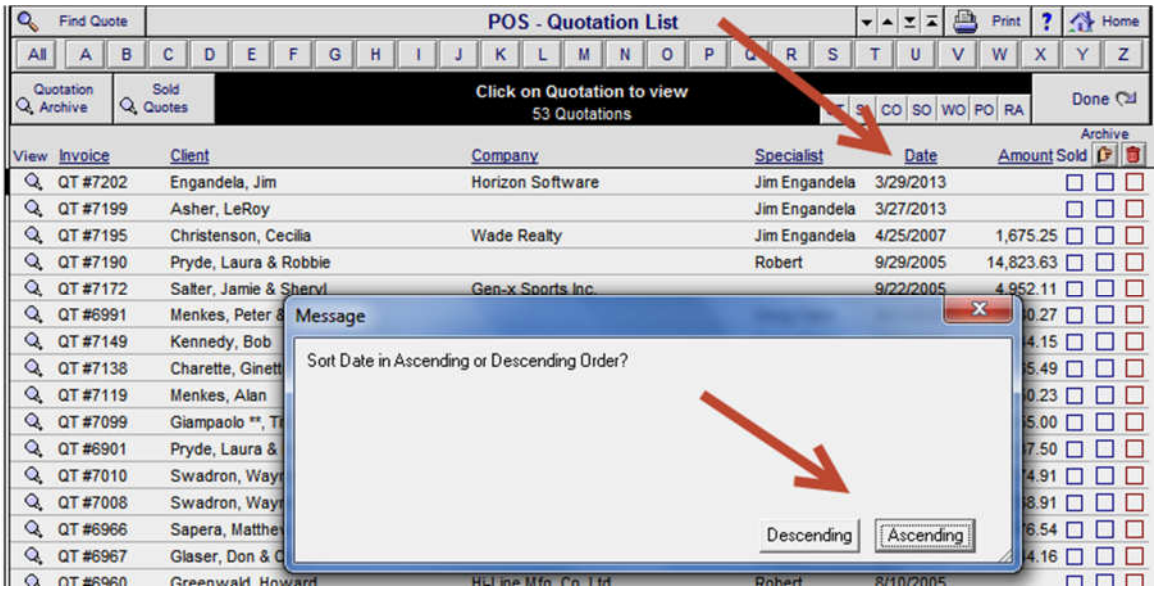
Enhancement – Proposal/Utility/Administration: Speed up Change Proposal Number screen

A new method for establishing the highest current Proposal/Project number in the system has been developed to vastly improve the speed of entering and leaving the Proposal/Utility/Administration screen.



Enhancement – POS/All Invoice List Screens: Sorting by Date in Descending & Ascending Order

You can now Sort All of the POS Invoice screen by either Ascending or Descending Order.

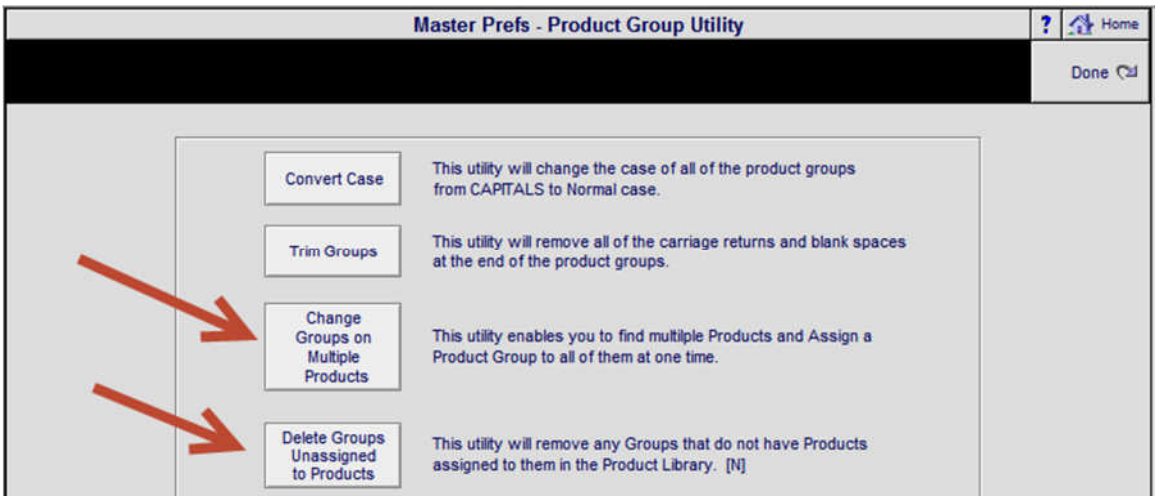


Enhancement – POS/All Invoices: Display Phone numbers for Unrelated Contacts

Phone Numbers POS Invoices now display even if the Contact relationship no longer exists.

Enhancement – Master Preferences/Groups/Utility: 2 New Group Utilities

1. This new utility enables you to find multiple Products and Assign a Product Group to all of them at one time.
2. This new utility will remove any Groups that do not have Products assigned to them in the Product Library. [N]



Enhancement – Product Library/Utility: Clean & Delete – Reset & Update – Find & Change

The Product Library/Utility screens have been organized into 3 Utility Categories for easier usage. These 3 screens are Clean & Delete, Reset & Update and Find & Change.

Product Library Utility - Clean & Delete
451 of 451
?
Done
Utility Lists
Clean Delete
Reset Update
Find Change
General Import
User Import
RCMS Import
Distributor Import
Export Products
Clean - Product Make, Model, Desc & Group Fields
This will set remove any blank spaces, carriage returns and quotes from the product Make, Model, SKU, Description, Features and Group fields.
Clean Fields
Clean - Duplicate Products
This utility will automatically find all products with the same Make & Model and add a unique (ID) to the model number to make that product unique.
Clean Duplicates
Clean - Set all Blank Disciplines to "Equipment"
This will set all Disciplines that are blank to your 1st Contract Subtotal Label or "Equipment" so that they will function properly in Proposals.
Set Disciplines
Clean - Set all Blank Product Class to "Product"
This will set all of the Product Class Fields to "Product" if they are blank. If they are not blank they will be left as they are.
Set Class
Clean - Shorten Make Name Lengths
This Utility will take you to a screen where you will be able to Find Makes longer than the length you can specify.
Shorten Make Lengths
Clean - Clear Recently Picked Product History
Use this utility clear all Recently Picked Product History.
Clear Recent History
Clean - Clear All "Enable Buy Package"
This will Clear the Enable Buy Qty Feature on all Products in the Product Libary and Project PO's.
Clear Buy Package
Delete - All Products in Library
This will permanently delete all of the products in this Product Library.
Delete All Products
Delete - Products without Model numbers
This will permanently delete all of the products in the Product Library without Model numbers.
Delete Blank Products
Delete - All PDF's imbedded in the OLD PDF fields
This will permanently delete all of the PDF's attached to your Products.
Delete PDF's
Delete - Zero Inventory on Hand Quantities
This will permanently Zero all Inventory Quantity on Hand on Product Library Products.
Zero Qty on Hand
Clean - Clear "Hide Product" Flags
This Utility will clear the "Hide Product" flag of any odd characters other than 1 or blank so that the AlphaFinder works properly
Clear Hide Flags
Clean - UnHidden Flags
Use this utility if you can't find products that have been UnHidden. It will not harm your hidden products.
Clean UnHidden Flags
Clean - UnHide "Do not Hide" Products
This utility will UnHide any product that has it's Do Not Hide checkbox checked .
UnHide Products

Product Library Utility - Reset & Update

451 of 451 ?

Done

Clean Delete | **Reset Update** | Find Change | General Import | User Import | RCMS Import | Distributor Import | Export Products

Reset - Net Cost based on Exchange Rate

If an exchange rate is entered into the Master Prefs/Other/Products 2 screen, and there are costs in the Optional Cost field on the Product Detail screen, then the Net Cost on that product will be set to the Optional Cost times the Exchange Rate.

Reset Net Cost with Exchange Rate

Reset - Products to "Issue Staple Up Cards"

This will set all of the Products in the Product Library to "Issue Staple Up Cards" in Proposals and Projects.

Reset Staple Cards

Reset - Overide Product Labor to Group Labor

Reset - Products

This will reset all the Overide Labor on all Products to the Labor assigned by the Product Group.

Reset Override Labor

Reset - Parts & Wire

This will reset all the Overide Labor on all Parts & Wire to the Labor assigned by the Product Group..

Reset Parts & Wire

Reset - Phantom Items to Products

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

Reset Phantom Products

Reset - Disconnect Supplements from Entities

This utility will disconnect Supplements manually added to Product from being deleted from Proposals & Projects when they are deleted from the Product Library.

Reset Entity Supplements

Update - AlphaFinder Make List

This utility will enable you to view all of the Makes in the Product Library when using the Find Product feature

Update Make List

Update - "Classifications" on All Products

This utility will update the Product Classification on All Products in the Product Library to the current settings in the Master Prefs/Groups.

Update Class

Update - All Parts and Wire "Prices"

Manually changing the price of a Part or Wire will not display the new price on the Products, they are attached to as supplements, unless you run this utility.

However the new Part & Wire prices will be correct when adding Products to a Proposal. Existing Proposal & Products are not affected by running this utility.

Update Prices

Update - Parts & Wire Labor Time

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

Update All Labor

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

Update Parts Labor

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

Update Wire Labor

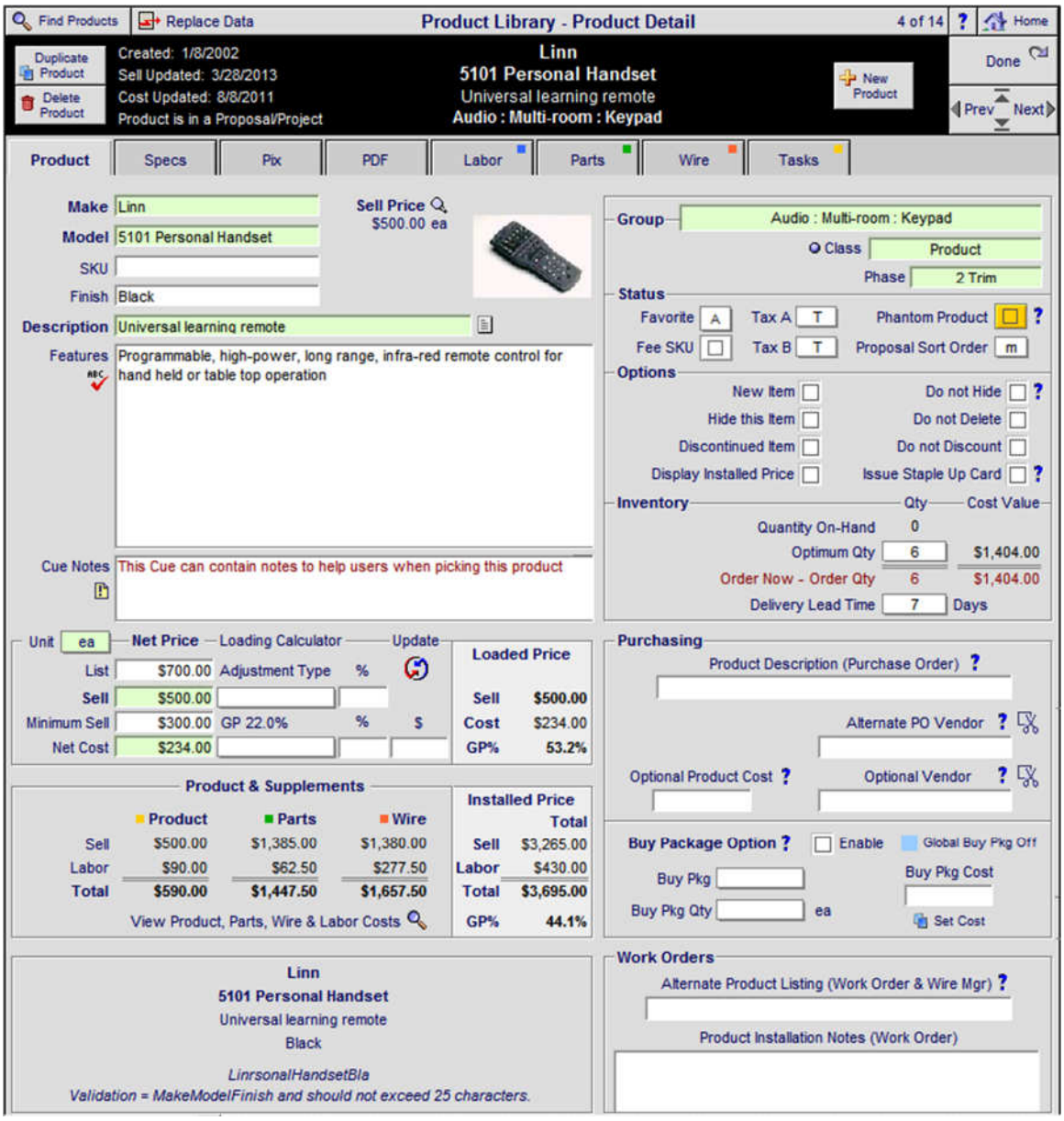
Update - Cost & Sell Updated "Dates"

This utility will set all Products that do not have a Updated Cost and Sell Date with today's date.

Update Dates

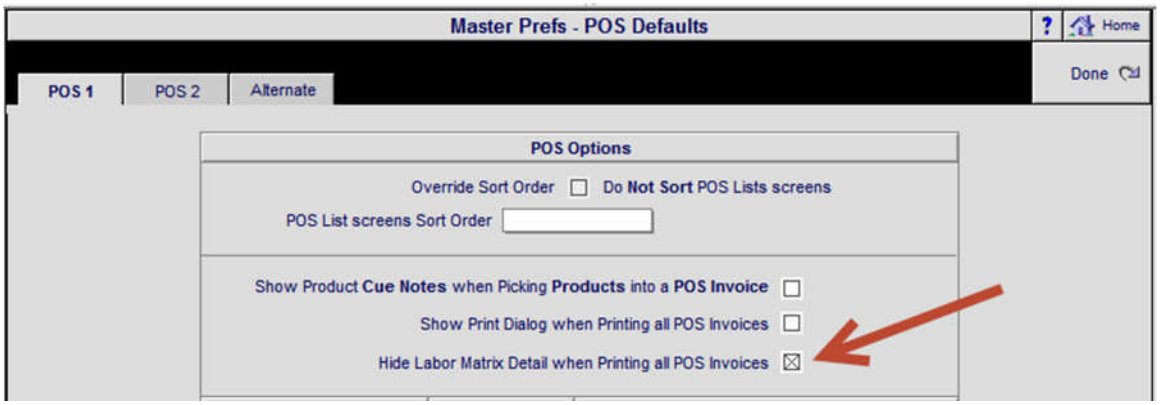
Enhancement – Product Library/Product Detail Screen: Rearrange for better Usage

The Product Library/Product Detail screen has been rearranged for better Usage. In particular the Product Supplement totals are now directly below the Product Prices so that the Installed price is easy to see. Purchasing and Work Order sections have been moved to the right side of the screen.



Enhancement – Master Preferences/POS Defaults: Hide Labor Matrix on POS Invoices

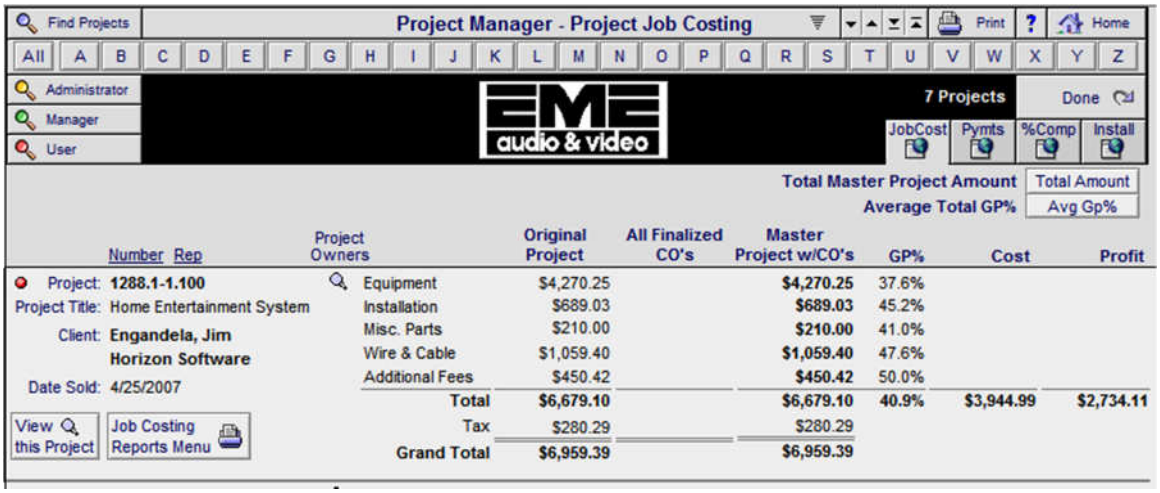
You can now choose to always Hide the Labor Matrix at the bottom of printed POS Invoices with this new POS Preference. You can always choose to show the Labor Matrix from the Setup screen within a POS Invoice.



Estimated Services	Hours	Rate	Amount
Equipment Installation:	0:00:00	90.00	
Total Labor:	0:00:00 Hrs		

Enhancement – Global Project Manager/Speed up screens

All Global Project Manager screens have been reworked to increase the speed required to display all of the data. These screens include the Job Cost, Payments, Percent of Completion and Install Progress screens.

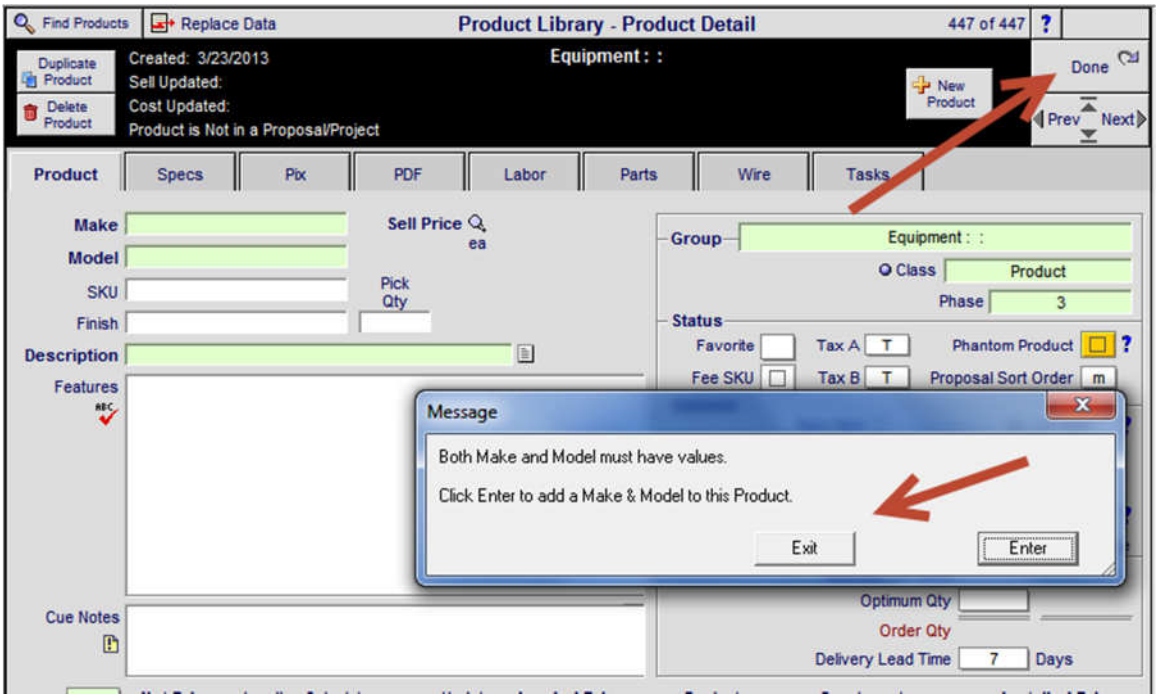


Enhancement – All Data Processing Screens: New Home and Exit buttons

All SCPS modules have a Data Processing screen. A Home and Exit button have been added to each of these screens, enabling users to go Home or Exit SCPS if they need to.

Enhancement – Product Library: Adding new Products

If you choose not to enter a Make and Model when adding a new product to the Product Library and choose the Exit option, a new routine has been added that automatically Unlocks the Proposal, so you can get back in.



Fix – Master Prefs/Groups/Utility: Delete All Group Labor Supplements

Deleting All Labor Supplements attached to all Products, in your Product Library, now functions properly. Labor Supplements in your Proposals and Projects are not deleted.

SCPS Version 10.0v3

Fix – Main Logo Screen/Logo Picture field: Auto Size Image

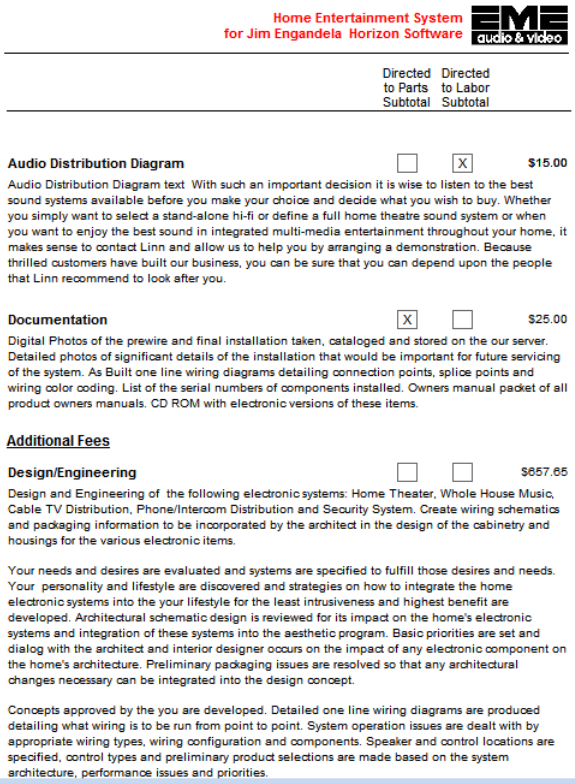
The Logo field has been set to Auto Size the logo to fit into the defined field size.

Fix – Proposal/Product Detail Portal: Properly displays the Product Discription

The Product Description on the Product in a Proposal now properly displays the Product Description.

Enhancement – Proposal/Project Approval Form/Fees: Display Fees directed to Parts & Labor

The Fees report in the Project Approval Package now displays the Fees that are directed to either the Parts or Labor Subtotals.

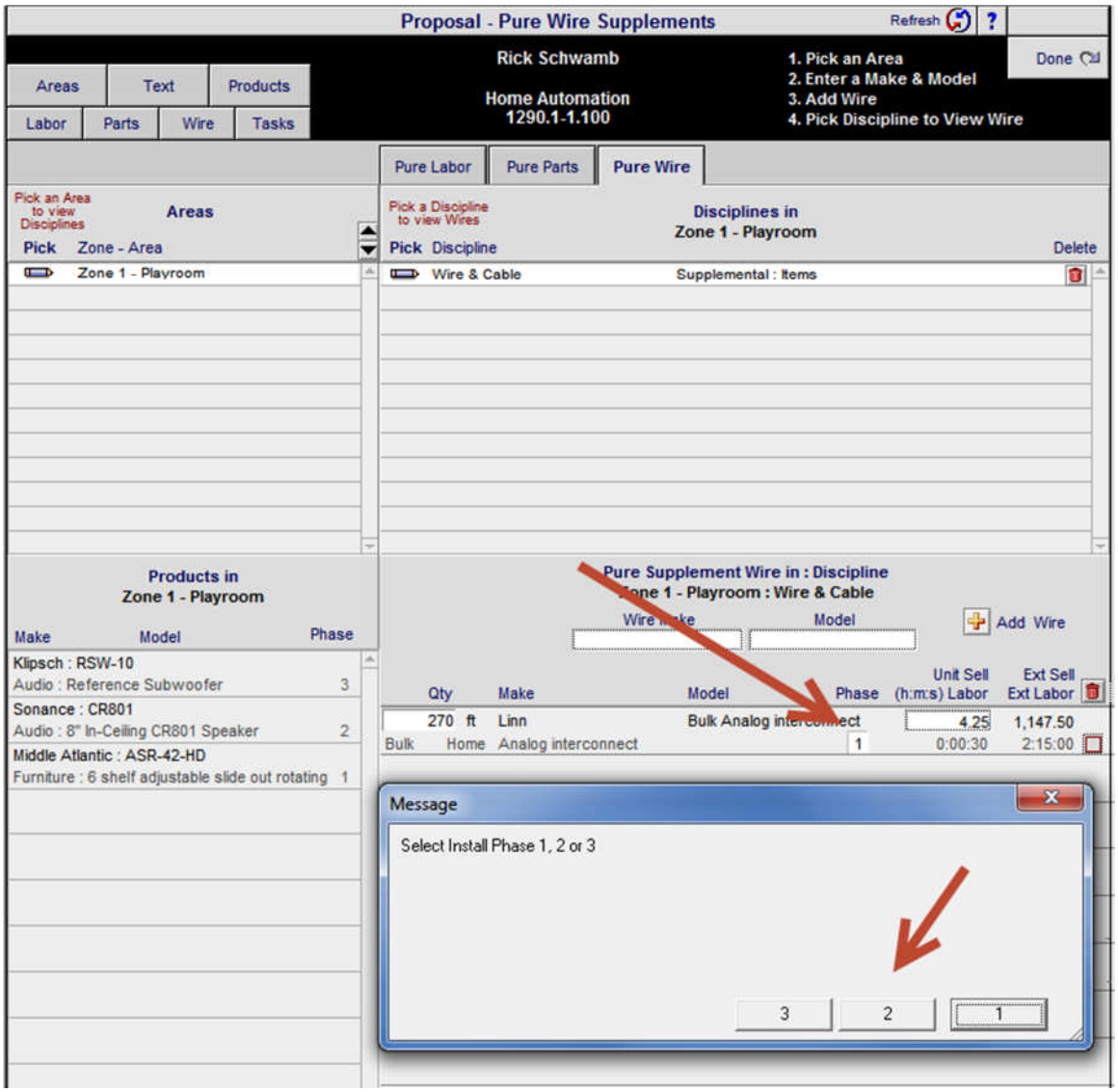


Home Entertainment System
for Jim Engandela Horizon Software

	Directed to Parts Subtotal	Directed to Labor Subtotal	
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.			
Documentation	☒	☐	$25.00
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.			
Additional Fees			
Design/Engineering	☐	☐	$657.65
Design and Engineering of the following electronic systems: Home Theater, Whole House Music, Cable TV Distribution, Phone/Intercom Distribution and Security System. Create wiring schematics and packaging information to be incorporated by the architect in the design of the cabinetry and housings for the various electronic items.			
Your needs and desires are evaluated and systems are specified to fulfill those desires and needs. Your personality and lifestyle are discovered and strategies on how to integrate the home electronic systems into the your lifestyle for the least intrusiveness and highest benefit are developed. Architectural schematic design is reviewed for its impact on the home's electronic systems and integration of these systems into the aesthetic program. Basic priorities are set and dialog with the architect and interior designer occurs on the impact of any electronic component on the home's architecture. Preliminary packaging issues are resolved so that any architectural changes necessary can be integrated into the design concept.			
Concepts approved by the you are developed. Detailed one line wiring diagrams are produced detailing what wiring is to be run from point to point. System operation issues are dealt with by appropriate wiring types, wiring configuration and components. Speaker and control locations are specified, control types and preliminary product selections are made based on the system architecture, performance issues and priorities.			

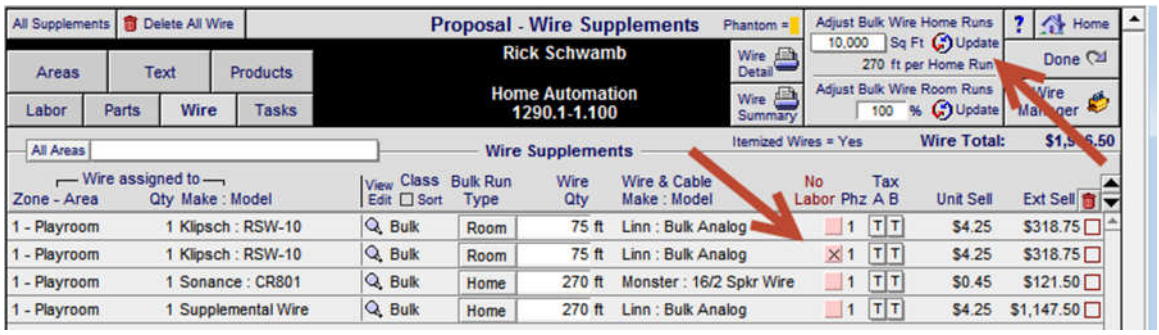
Fix – Proposal/Pure Parts & Wire Supplements: Changing Phase now Changes Labor

Changing the Phase on Pure Parts and Wire Supplements in a Proposal, now correctly changes the Labor associated with the Parts and Wire.



Fix – Proposal/Wire Supplements: Changing Bulk Wire Lengths with No Labor

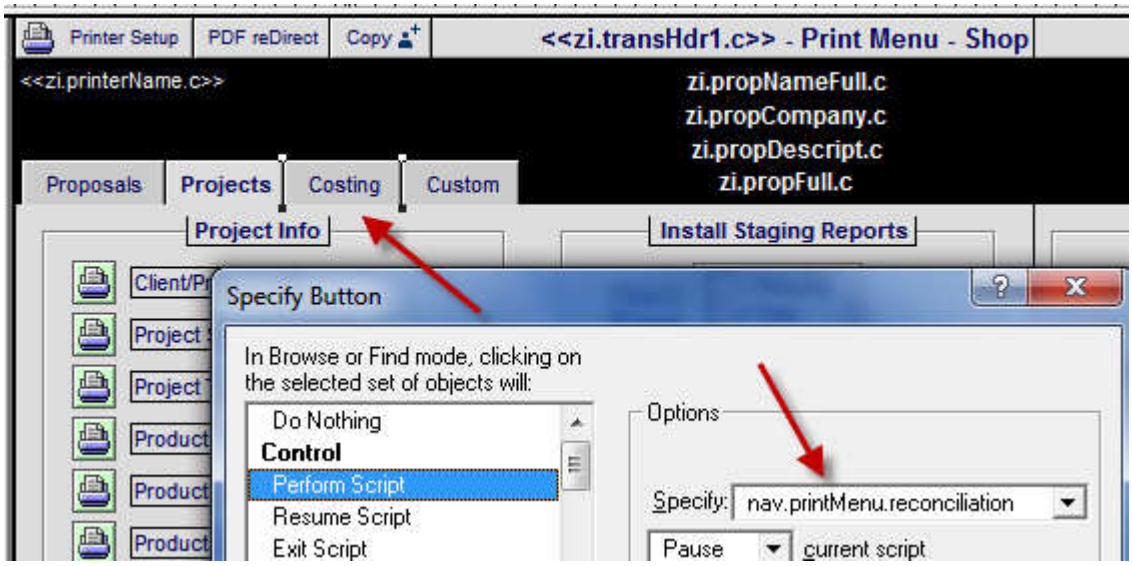
If you checked the No Labor option and any Bulk Wire the Adjust Bulk Wire Update routine would Zero the Labor associated with the Bulk Wires. This has been corrected.



SCPS Version 10.0v2

Enhancement – Project/Print Menu/Costing screen: Speed up entry and exit

Entering and Leaving the Costing screen from the Project/Print Menu screen is now much faster.



Enhancement – Project/Print Menu/Shop: All Staging reports: Cost and Sell prices.

All Project Staging Reports now include the product cost and sell prices.

SCPS Version 10.0v1

Released: 3/11/2013

Enhancement – Login and Main Logo screen. Rearrange Graphics and User Info

Login and Main Logo screen 1 & 2. Rearrange screen graphics and User Info for better usability.

Enhancement – Increase speed of Opening SCPS

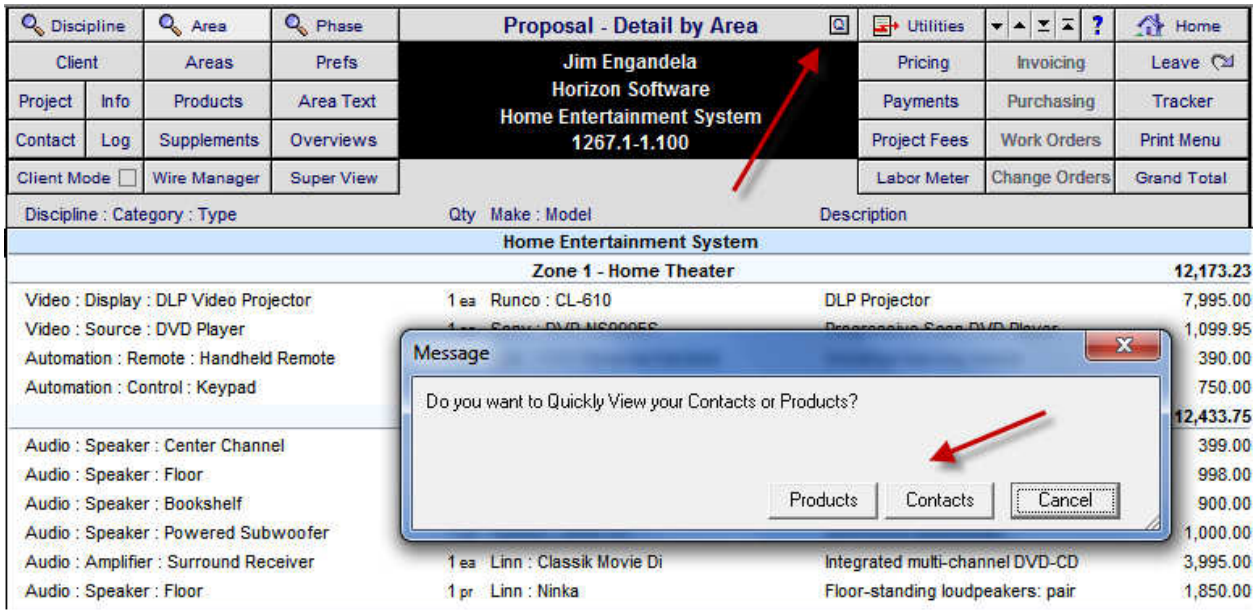
Opening SCPS now is faster because each database is opened fully initially and then resized based on User Preferences during the Login Process.

Enhancement – Increase speed of Exiting SCPS

Exiting SCPS now is faster because each database because exit routine no longer reopens some files, to prep them, during the exit process.

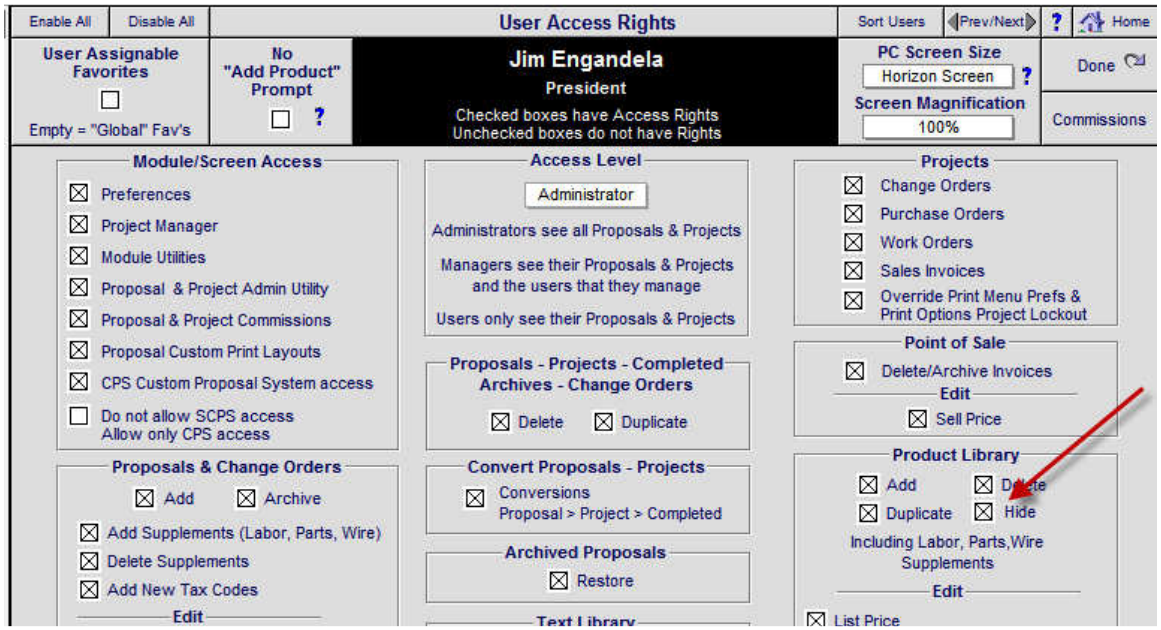
Enhancement – Proposal/Project Detail screen: Relocate Quick View Icon

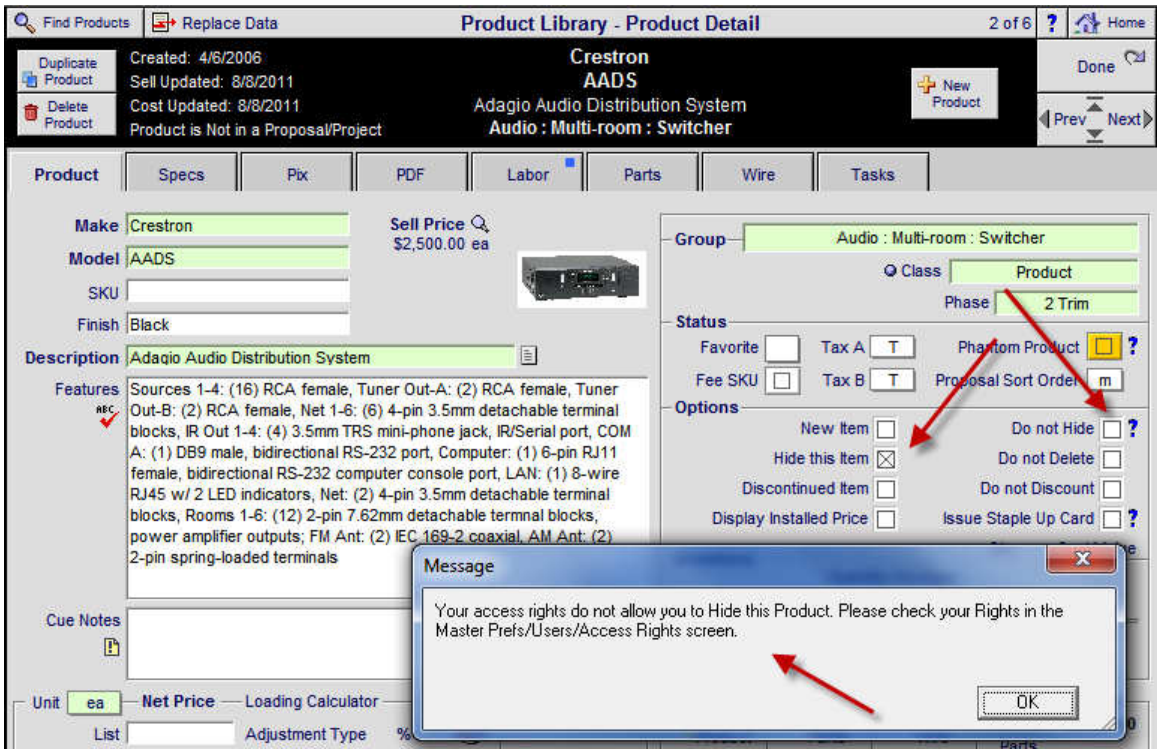
The Quick View button enables you to View your Product and Contact Library while you are in a Proposal or Project and return directly to the Proposal/Project Detail screen.



Enhancement – Master Prefs/Users/Access Rights: Hide Products in Product Libary

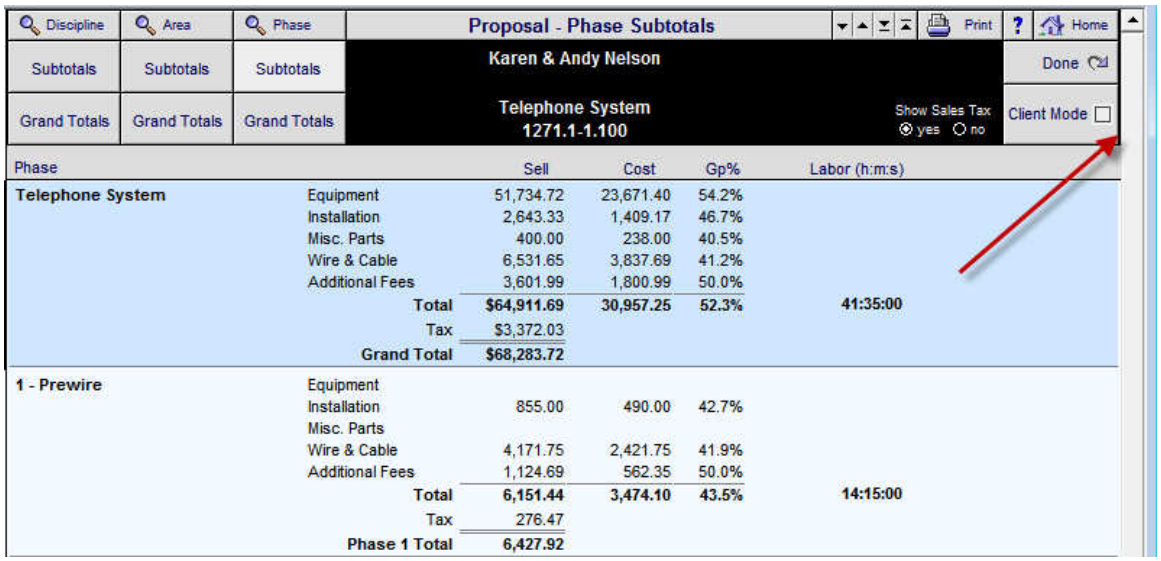
You now can set Access Rights for all users to enable or prevent them from Hiding Products or Setting the Do not Hide feature on products in the Product Library.





Enhancement – Proposal/Discipline, Area, Phase Sub & Grand Total screen refresh

All of these screens now refresh and calculate only once and optimize their screens to the full width of the header.



Enhancement – Proposal/Print Menu/Costing: Product Summary by Phase Report-Change Unit Sell

When you sum the quantities of like kind items you can only show 1 of the sell prices, not each individual price. This is a problem if the unit sell price on each like kind item is different. Now the sum qty is divided by the total price (working backwards) to show the average unit price…. so it adds up. The Products, Parts and Wire Unit Sell now shows Average Unit Sell price.

The header label on the report indicates that this is the average unit price.

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

3/5/2013

EME Audio & Video Systems - Confidential Report

Summary by Phase - Products/Supplements/Labor

Page 1

Ann & Bob Traaseth
Home Automation
1279.1-1.100

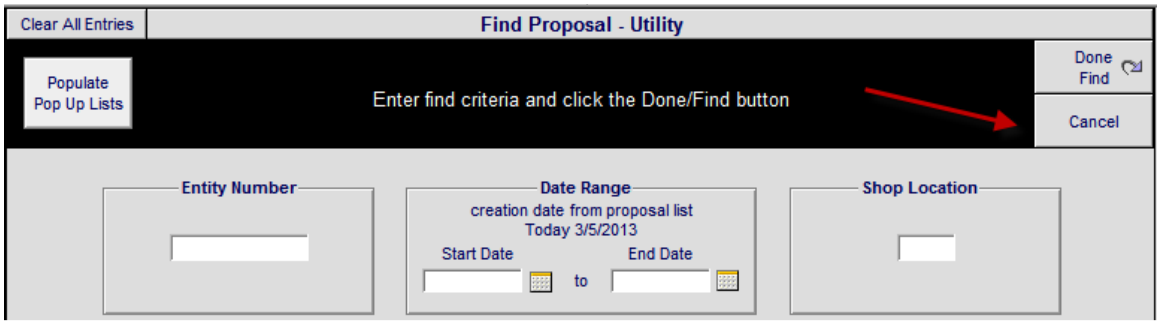
Product -Make - Model Part Wire		Qty	Unit Cost	Products - Supplement No Fees included Average Unit Sell	Ext Sell
				Products, Parts & Wire Total:	$2,341.25
Labor (h:m:s) 6:45:00	**Installation Phase: 1**			Labor Total:	$405.00
				Phase Total without Fees:	$2,881.25
Linn : Bulk Analog interconnect		75 ft	$2.55	$4.25	$318.75
Linn : K10 Cable		150 M	$3.00	$5.00	$750.00
Linn : K20 Cable		375 ft	$1.64	$2.74	$1,027.50
Monster : CAT5 Bulk		150 ft	$0.25	$0.80	$120.00
Linn : CAT5-40m		1 ea	$75.00	$125.00	$125.00
				Products, Parts & Wire Total:	$770.00
Labor (h:m:s) 0:45:00	**Installation Phase: 2**			Labor Total:	$42.50
				Phase Total without Fees:	$830.00
Linn : Knekt RCU		1 ea	$450.00	$750.00	$750.00
Linn : Knekt RCU Metalwork		1 ea	$12.00	$20.00	$20.00
				Products, Parts & Wire Total:	$23,039.90
Labor (h:m:s) 7:50:00	**Installation Phase: 3**			Labor Total:	$548.33
				Phase Total without Fees:	$23,666.57
Linn : 5101 Personal Handset		1 ea	$234.00	$390.00	$390.00
Linn : 5125		1 ea	$1,650.00	$2,750.00	$2,750.00
Linn : Katan		5 pr	$597.00	$995.00	$4,975.00
Linn : Melodik		1 ea	$2,970.00	$4,950.00	$4,950.00
Runco : CL-610		1 ea	$4,797.00	$7,995.00	$7,995.00
Sony : DVP-NS999ES		1 EA	$620.40	$1,099.95	$1,099.95
Linn : IR Repeater		1 ea	$50.00	$85.00	$85.00
Linn : Phono Plugs-Standard		1 ea	$57.00	$95.00	$95.00
Linn : Black Interconnect		5 pr	$72.00	$120.00	$600.00
Monster : HDMI400-1M		1 ea	$59.97	$99.95	$99.95

Enhancement – Proposal/Approval Form: Improve module

Create a new Product Summary report that always shows unit and extended sell prices regardless of the print prefs. Use this new Product Summary in the print cue. Make Fees always show prices. Change Access to Approval Form, Fix Fee Amount Overwrite on Fee Summary Report. Other minor tweaks. Create User Access Rights for the Product Library Hide Products feature.

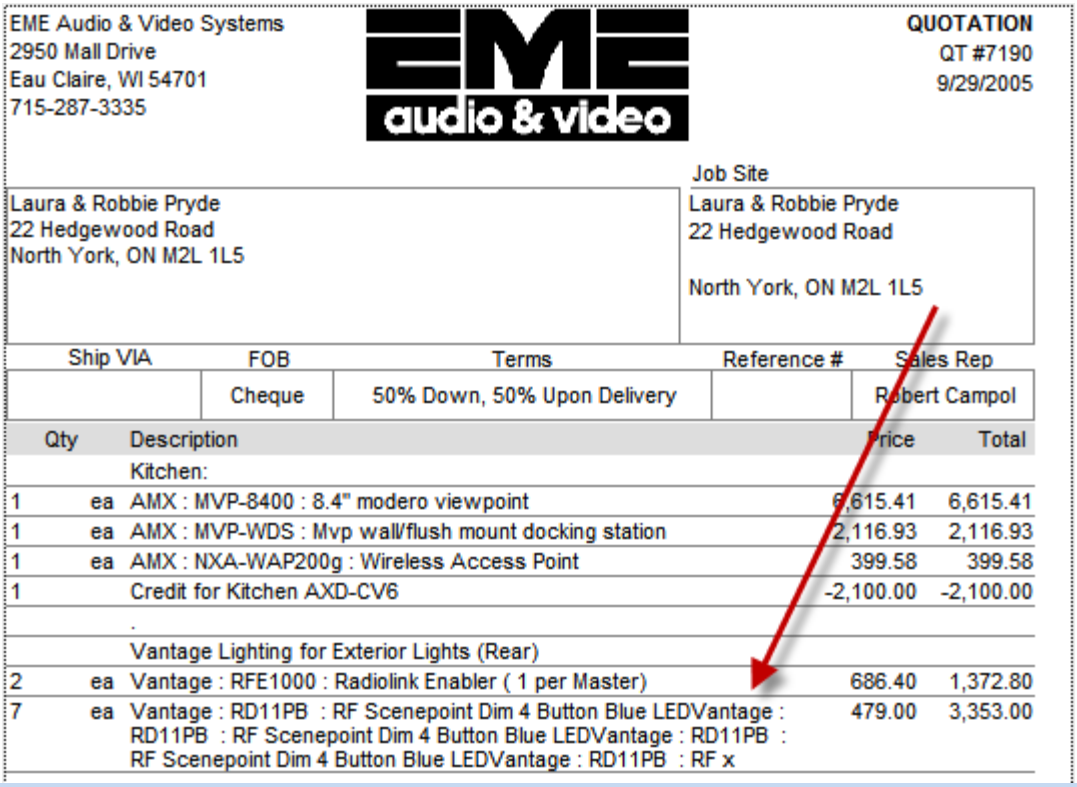
Enhancement – Find Proposal /Cancel: Improve Cancel Routine to speed up processing.

Improve Cancel routine to speed up processing.



Enhancement – POS: Quotes, Sales Invoices, Work Orders, PO's. Increase Line items to 2 Lines

All POS Invoices can now display up to 2 lines of text on screen form which translates to 3 lines on the printed Invoices. Line weights on all Invoices are now slightly thinner so that they look better when PDF's are created.



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

QUOTATION
QT #7190
9/29/2005

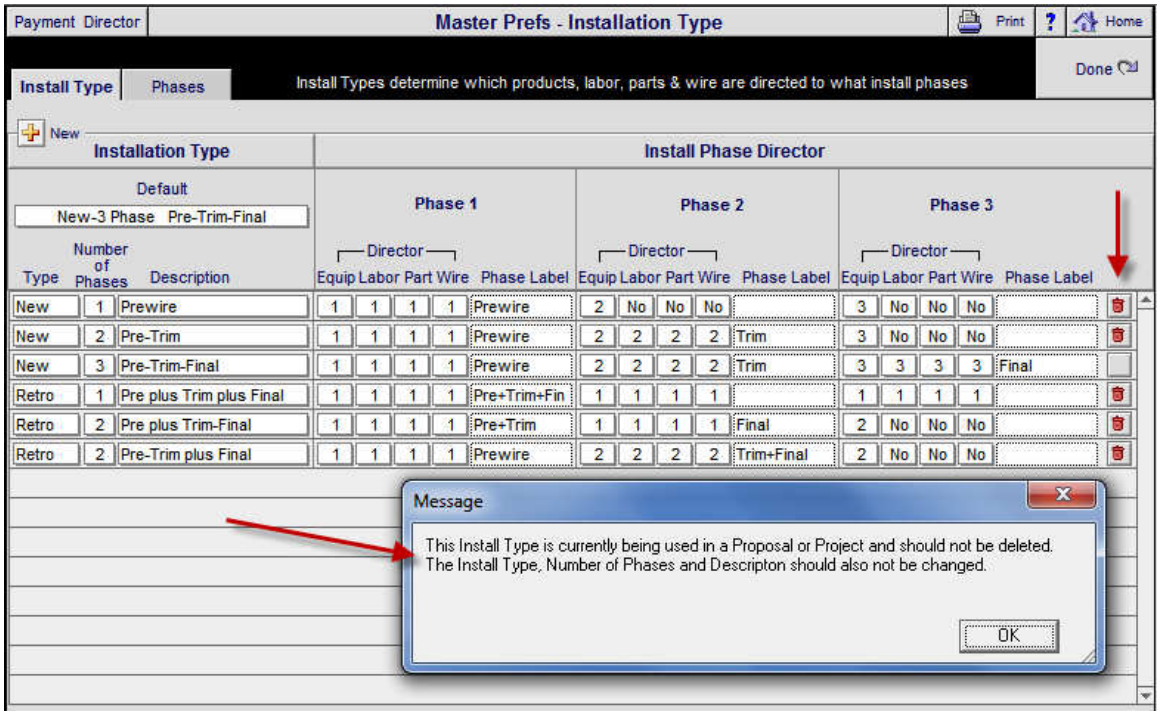
	Job Site
Laura & Robbie Pryde 22 Hedgewood Road North York, ON M2L 1L5	Laura & Robbie Pryde 22 Hedgewood Road North York, ON M2L 1L5

Ship VIA	FOB	Terms	Reference #	Sales Rep
	Cheque	50% Down, 50% Upon Delivery		Robert Campol

Qty		Description	Price	Total
		Kitchen:		
1	ea	AMX : MVP-8400 : 8.4" modero viewpoint	6,615.41	6,615.41
1	ea	AMX : MVP-WDS : Mvp wall/flush mount docking station	2,116.93	2,116.93
1	ea	AMX : NXA-WAP200g : Wireless Access Point	399.58	399.58
1		Credit for Kitchen AXD-CV6	-2,100.00	-2,100.00
		.		
		Vantage Lighting for Exterior Lights (Rear)		
2	ea	Vantage : RFE1000 : Radiolink Enabler (1 per Master)	686.40	1,372.80
7	ea	Vantage : RD11PB : RF Scenepoint Dim 4 Button Blue LEDVantage : RD11PB : RF Scenepoint Dim 4 Button Blue LEDVantage : RD11PB : RF Scenepoint Dim 4 Button Blue LEDVantage : RD11PB : RF x	479.00	3,353.00

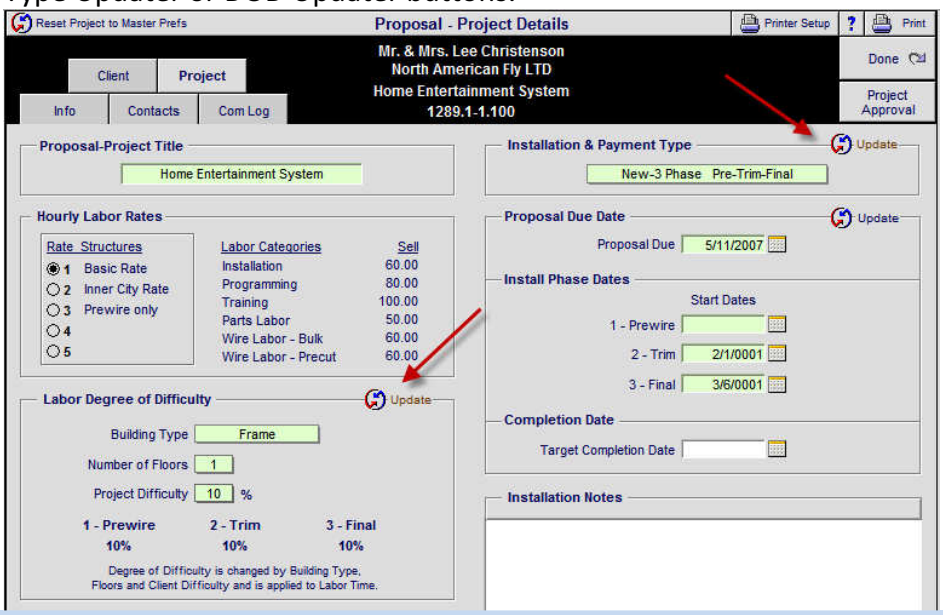
Enhancement – Master Prefs/Install Type: Control Deletion of Install Types

Install Types that are not used in existing Proposals and Projects now show the Delete Icon and can be deleted. Install Types that are used in Existing Proposals and Projects do not show the Delete Icon and cannot be deleted. A Proposal/Project Debug screen has been created to make it easier to groom Install Types should that be necessary.



Enhancement – Proposal & Pending CO/Project screens: Connect Updates together

Updating the Install Type also Updates the DOD Labor. These two routines run if you click either the Install Type Updater or DOD Updater buttons.

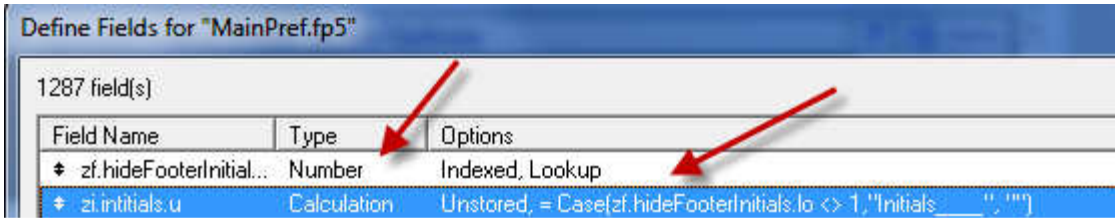


Fix – Proposal/Utility: Convert Proposal to Project Utility. Remove Product Update message

When converting a Proposal to a Project, a message to tag and update products pops up. This has been removed.

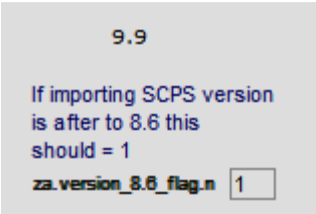
Fix – Proposal/Print Menu/Options: Refresh Footer Intials field to display properly

Change the lookup field to a Number and change the display field to Unstored.



Fix – Master Prefs: AutoSet Import Map 8.6 flag = 1 at Initial Log in.

During the log in process, the Import Map after 8.6 Flag is set to 1, This insures the upgrades will process properly.



Fix – Exit SCPS: Close Caltask file

Add Close File Step to the ops.close routine in Caltask, so the file closes properly.

SCPS Version 9.9v1

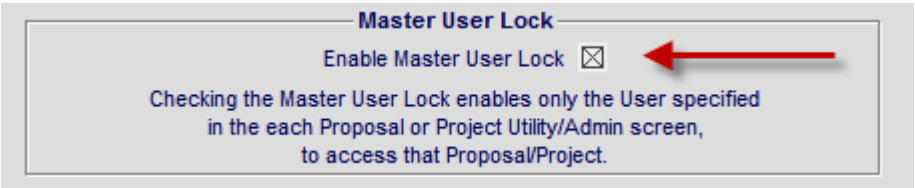
Released: 2/13/2013

Please note: *There is an extra data grooming routine at the end of the upgrade process, in version 9.9v1 that requires a little extra time. Please let the upgrade process until it is completed.*

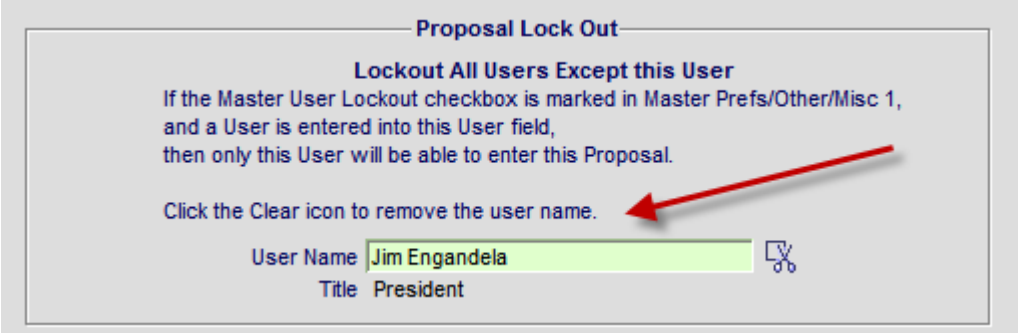
Enhancement – Proposal/Project/CO: User Lockout System

If the Master User Lock is checked in the Master Prefs/Other/Misc 2 screen, then only the User specified in the Proposal/Project/Utility/Admin screen can enter that Proposal or Project. A red indicator shows who the specified user is. If a User other than the one specified tries to open a Proposal or Project, a message pops up.

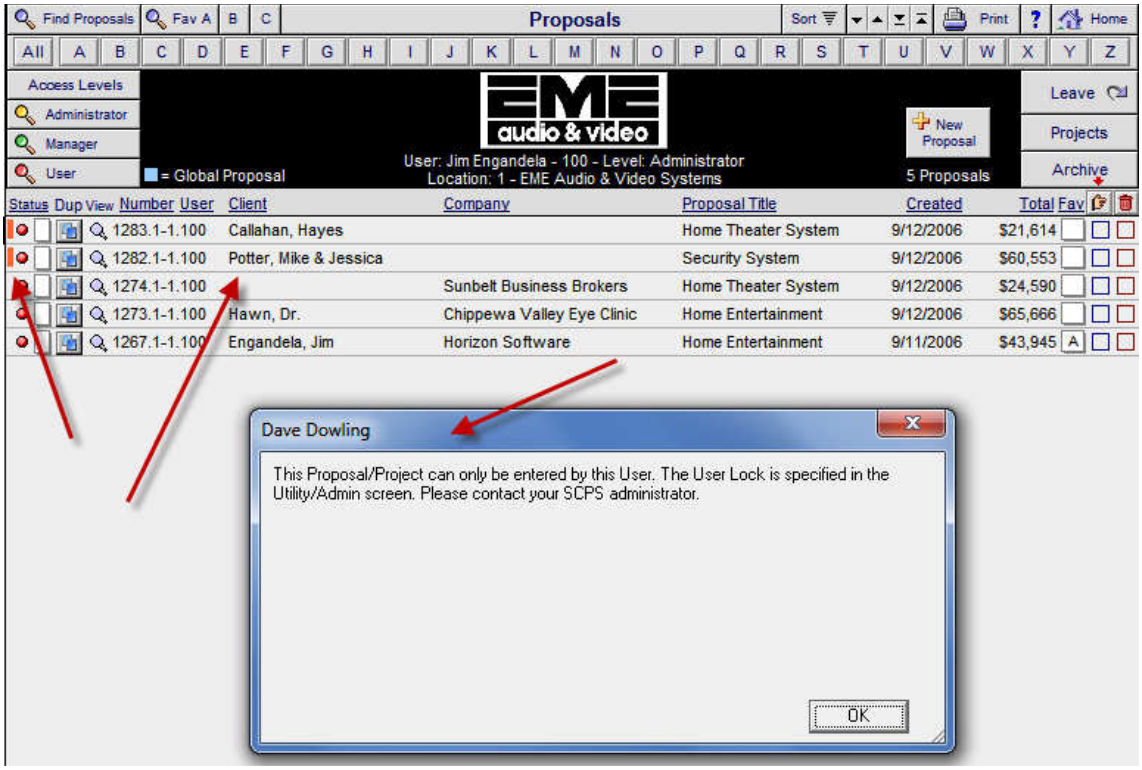
Master Prefs/Other/Misc 2 screen



Proposal-Project-Change Order/Utility/Admin screen

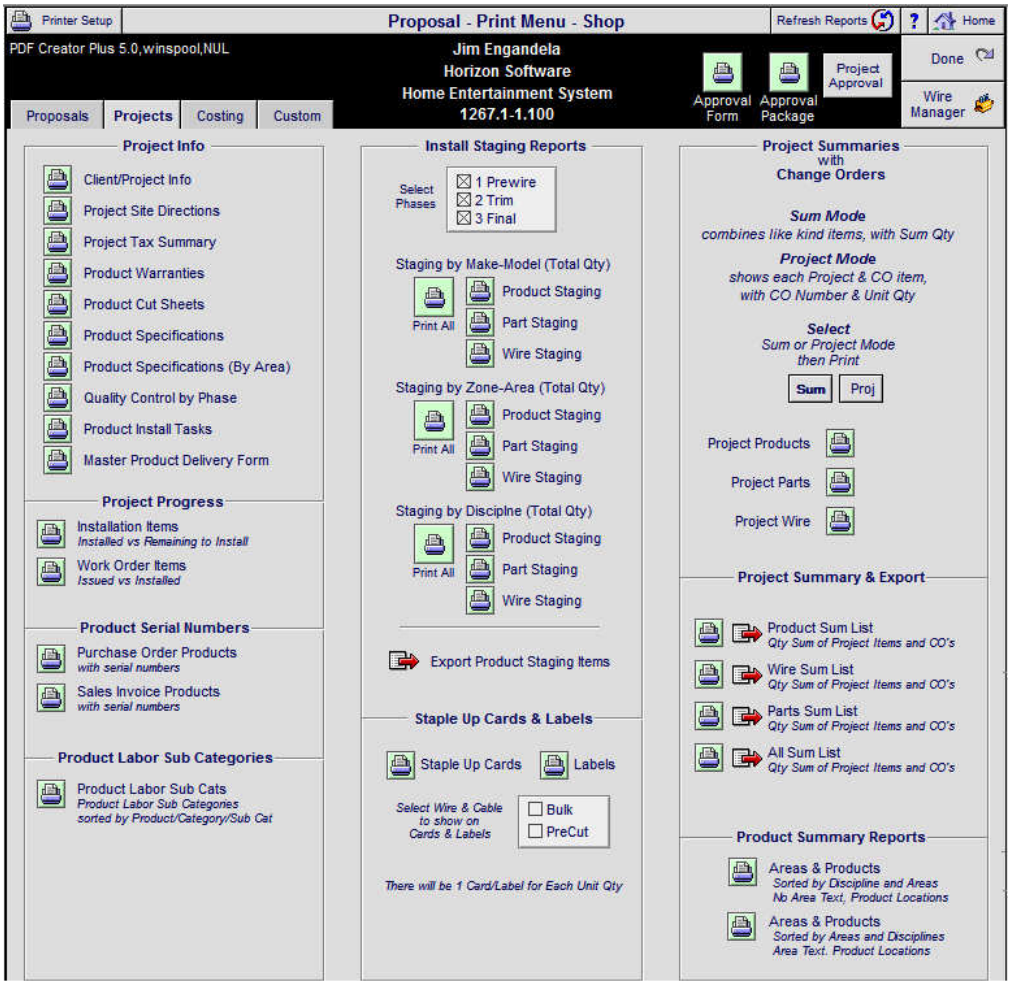


Proposal-Project-Completed-Archived/List screens



Enhancement – Proposal/Print Menu: ReName & Reorganize Project and Costing screens

The Print Menu/Shop screen has been renamed to Projects and reports have been divided into Project and Costing screens for better clarity.

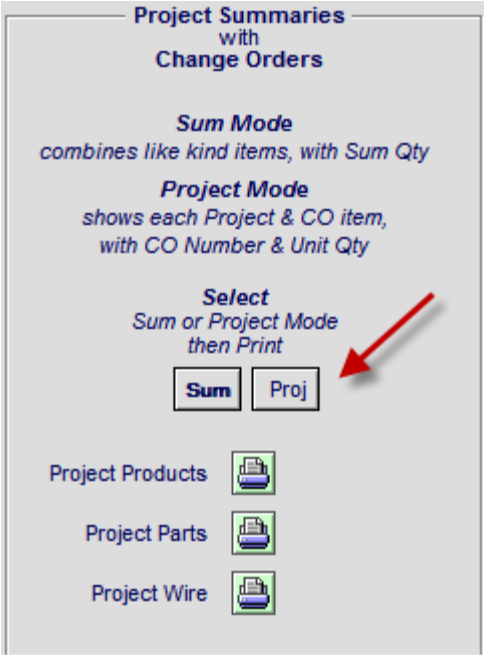


Enhancement – Proposal/Print Menu/Projects: Project Summaries with Change Orders

This Utility enables you to choose between the Sum and Project Mode. The Sum Mode gives you the Total Qty of each item, where "like kind" items show on as a single line item with the total Qty.

In the Project Mode each item is listed separately with the Change Order number it belongs to.

In addition the report shows the Qty of each item on Back Order, Remaining to Install and Remaining to Invoice.



EME Audio & Video Systems - Reconciliation Report

2/7/2013 **Product Line List** Page 1

John & Mary Smith
Home Entertainment System
1284.1-1.100

Sum Mode Quantities include Change Order Additions & Deletions

Sum Mode

Zone - Area	CO#	Qty	Make : Model Finish - Description	PO On Back Order	WO Left to Install	SI Left to Invoice
		1 ea	Klipsch : RC-35 Black Center Channel Speaker		1	0
		2 ea	Klipsch : RF-35 Black Reference Tower		2	0
		2 ea	Klipsch : RS-7 Matte Reference Surround		2	0
		1 ea	Klipsch : RSW-10 Black Reference Subwoofer		1	1
		1 ea	Linn : 5101 Personal Handset Black Universal learning remote	0	1	0
		1 ea	Linn : 5125 Silver Five channel power	1	1	0
		2 ea	Linn : Classik Movie Di Black Integrated multi-channel		1	2
		2 ea	Linn : Classik Movie Di Black Integrated multi-channel		1	2

EME Audio & Video Systems - Reconciliation Report

2/7/2013

Product Line List

Page 1

John & Mary Smith
Home Entertainment System
1284.1-1.100

Sum Mode Quantities include Change Order Additions & Deletions

Proj Mode

Zone - Area	CO#	Qty	Make : Model Finish - Description	PO On Back Order	WO Left to Install	SI Left to Invoice
2 - Living Room		1 ea	Klipsch : RC-35 Black Center Channel Speaker		1	0
2 - Living Room		2 ea	Klipsch : RF-35 Black Reference Tower		2	0
2 - Living Room		2 ea	Klipsch : RS-7 Matte Reference Surround		2	0
2 - Living Room	C	1 ea	Klipsch : RSW-10 Black Reference Subwoofer		1	1
1 - Home Theater		1 ea	Linn : 5101 Personal Handset Black Universal learning remote	0	1	0
1 - Home Theater		1 ea	Linn : 5125 Silver Five channel power	1	1	0
2 - Living Room		1 ea	Linn : Classik Movie Di Black Integrated multi-channel		1	1
5 - Master Bedroom		1 ea	Linn : Classik Movie Di Black Integrated multi-channel		1	1
3 - Office		1 ea	Linn : Classik Movie Di-B Blue Integrated multi-channel		1	1
1 - Home Theater	A c2	1 ea	Linn : Classik Music-S Silver Integrated CD	1	1	1

EME Audio & Video Systems - Reconciliation Report

2/7/2013

Parts Line List

Page 1

John & Mary Smith
Home Entertainment System
1284.1-1.100

Sum Mode Quantities include Change Order Additions & Deletions

Proj Mode

Zone - Area	CO#	Qty	Make : Model	PO On Back Order	WO Left to Install	SI Left to Invoice
4 - Dining Room	D c3	-1 ea	Linn : IR Repeater		-1	-1
4 - Dining Room	D c3	-1 ea	Linn : Knekt RCU Metalwork		-1	-1
1 - Home Theater	A c2	1 ea	Linn : Phono Plugs-Standard		1	1
5 - Master Bathroom		2 pr	Linn : Wall Box		2	2

2/7/2013

EME Audio & Video Systems - Reconciliation Report

Wire Line List

John & Mary Smith
Home Entertainment System
1284.1-1.100

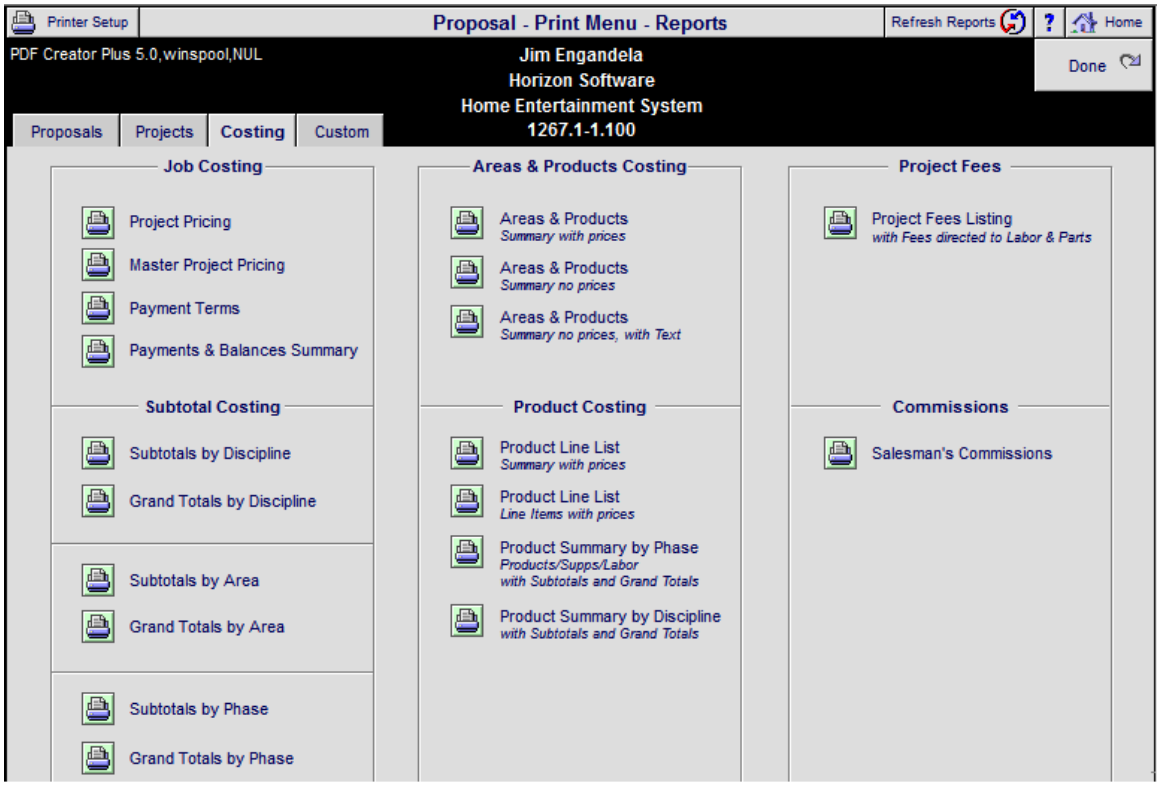
Sum Mode Quantities include Change Order Additions & Deletions

Proj Mode

Zone - Area	CO#	Qty		Make : Model	PO On Back Order	WO Left to Install	SI Left to Invoice
3 - Office		1	pr	Linn : Black Interconnect			
				Linn : Classik Movie Di-B		1	1
3 - Office		1	pr	Linn : Black Interconnect			
				Linn : Classik Movie Di-B		1	1
3 - Office		1	pr	Linn : Black Interconnect			
				Linn : Classik Movie Di-B		1	1
3 - Office		1	pr	Linn : Black Interconnect			
				Linn : Classik Movie Di-B		1	1
3 - Office		1	pr	Linn : Black Interconnect			
				Linn : Classik Movie Di-B		1	1
3 - Office		1	pr	Linn : Black Interconnect			
				Linn : Classik Movie Di-B		1	1
1 - Home Theater	A c2	1	pr	Linn : Black Interconnect			
				Linn : Classik Music-S		1	1
1 - Home Theater	A c2	1	pr	Linn : Black Interconnect			
				Linn : Klimax Chakra 500		1	1
1 - Home Theater		75	ft	Linn : Bulk Analog interconnect			
				Linn : Melodik		75	75
2 - Living Room	C	75	ft	Linn : Bulk Analog interconnect			
				Klipsch : RSW-10		75	75
2 - Living Room	A c1	75	ft	Linn : Bulk Analog interconnect			
				Klipsch : RSW-10		75	75
2 - Living Room	A c1	75	ft	Linn : Bulk Analog interconnect			
				Linn : Melodik		75	75
2 - Living Room	A c1	75	ft	Linn : Bulk Analog interconnect			
				Linn : Melodik		75	75

Enhancement – Proposal/Print Menu: New Costing screen

The Print Menu/Costing screen has been added to accommodate Job Costing Reports.



Enhancement – Proposal/All Discipline, Area, Phase screens and Print Menu Reports

All Discipline, Area, Phase Detail, Subtotal, Grand Total screens and Print Menu reports have been tuned up for greater screen refresh speed, stability and accuracy.

Discipline | Area | Phase | **Proposal - Phase Subtotals** | Print | ? | Home

Subtotals | Subtotals | Subtotals | Jim Engandela, Horizon Software, Home Entertainment System, 1267.1-1.100 | Done

Grand Totals | Grand Totals | Grand Totals | Show Sales Tax (yes / no) | Client Mode

Phase		Sell	Cost	Gp%	Labor (h:m:s)
Home Entertainment System	Equipment	36,535.89	21,692.40	40.6%	
	Installation	6,000.83	3,336.46	44.4%	
	Misc. Parts	1,353.33	807.00	40.4%	
	Wire & Cable	6,606.65	3,666.69	44.5%	
	Additional Fees	2,945.02	1,472.51	50.0%	
	Total	**$53,441.73**	**30,975.06**	**42.0%**	**104:07:30**
	Tax	$2,272.35			
	Grand Total	**$55,714.08**			
1 - Prewire	Equipment				
	Installation	1,437.50	809.38	43.7%	
	Misc. Parts				
	Wire & Cable	4,006.75	2,106.75	47.4%	
	Additional Fees	820.72	410.36	50.0%	
	Total	**6,264.97**	**3,326.48**	**46.9%**	**23:57:30**
	Tax	244.99			
	Phase 1 Total	**6,509.96**			
2 - Trim	Equipment	4,669.95	2,779.00	40.5%	
	Installation	985.00	552.50	43.9%	
	Misc. Parts	100.00	60.00	40.0%	
	Wire & Cable				
	Additional Fees	90.00	45.00	50.0%	
	Total	**5,844.95**	**3,436.50**	**41.2%**	**18:25:00**
	Tax	258.97			
	Phase 2 Total	**6,103.92**			
3 - Final	Equipment	31,865.94	18,913.40	40.6%	
	Installation	3,578.33	1,974.58	44.8%	
	Misc. Parts	1,253.33	747.00	40.4%	
	Wire & Cable	2,599.90	1,559.94	40.0%	
	Additional Fees	2,034.30	1,017.15	50.0%	
	Total	**41,331.81**	**24,212.07**	**41.4%**	**61:45:00**
	Tax	1,768.39			
	Phase 3 Total	**43,100.20**			

Enhancement – Proposal/Products: Improve GUI and functionality

Redesign Proposal/Products screen for better clarity and usage.

Super View | Area Sum | Prod Sum | Client Mode | **Proposal - Products** | Total $36,535.89 | Home

Areas | Text | Products | Show All | Jim Engandela, Horizon Software, Home Entertainment System, 1267.1-1.100 | Auto Price Adjuster | Update All Products | Delete All Options | Done

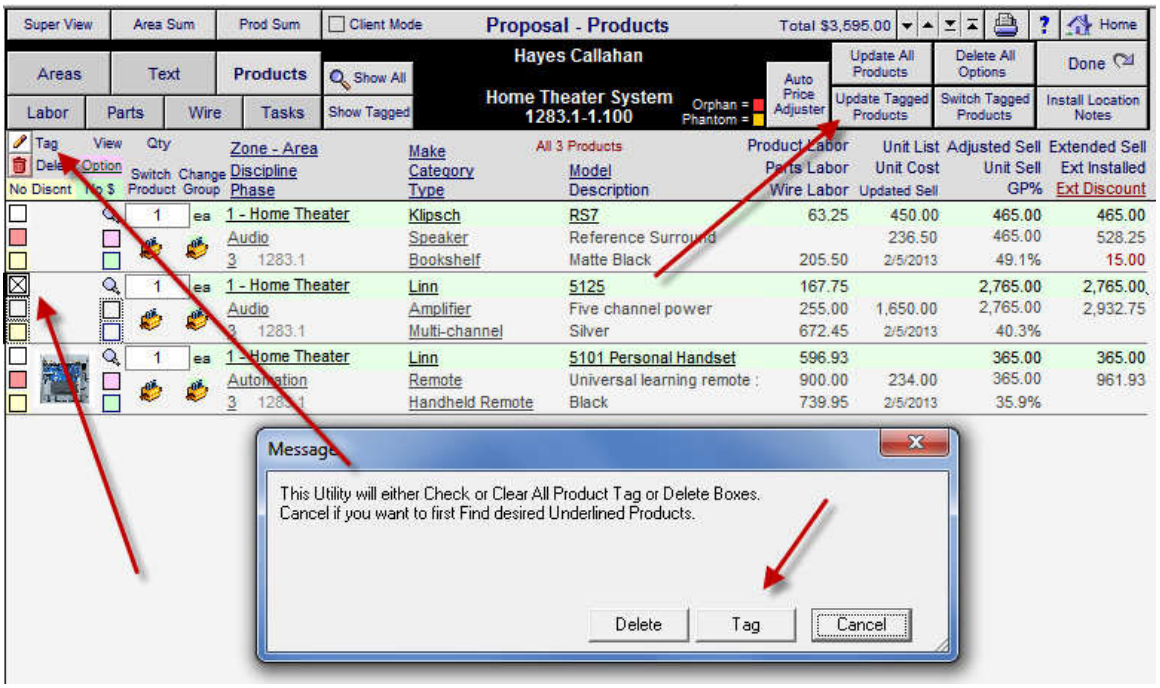
Labor | Parts | Wire | Tasks | Show Tagged | Orphan = Phantom = | Update Tagged Products | Switch Tagged Products | Install Location Notes

All 24 Products

Tag / Delete / No Discnt	View / Option / No $	Qty / Switch Product / Change Group	Zone - Area / Discipline / Phase	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 / Ext Discount
		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
		1 ea	1 - Home Theater	Linn	5101 Personal Handset	73.33		390.00	390.00
			Automation	Remote	Universal learning remote :		234.00	390.00	463.33
			3 1267.1	Handheld Remote	Black	750.00	2/5/2013	40.0%	

Enhancement – Proposal/Products: Update Tagged Products

In addition to Updating All of the Proposal Products, you can now Update only the Products that you have Tagged. Tagging (checking the tag box) can be done manually or by using the Auto Tag utility. Products that are Updated will now reflect the current Product Info, Pricing and Supplements from the Product Library.



Enhancement – Proposal/Client/Billing Contact: Show Client and/or Billing Contact

You can now choose to show just the normal Client address and /or the Billing Contact address on the Proposal Cover Page. Version 9.1 of the Custom Reports module also has this feature.

Proposal - Client & Project - Alternate Billing 2738 Print ? Done

Check to use this Contact Info on all Project Sales Invoices

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

Billing Client — Modify or Switch Contact

☒ Check to Bill this Client

First Name: Jim
Last Name: Engandela
Company: Horizon Software
Proposal Name: Mr. & Mrs. Christenson
Fav Format: SL Title + Last Name

Billing Address

S. 15700 Hwy U.
City: Strum
State: WI Zip: 54770
Country:

eMail

Click eMail button to send eMail to Client

eMail Address: Kris Birth, 1/29 eMail

Cover Page Billing Label

Select Proposal Cover Page Option

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

(H) 4144250186

Billing Numbers

Home Phone	4144250186	Ext	
Work Phone	715-695-3533	Ext	
Chris mobile		Ext	
Cell Phbae	715-797-3533		
	715-797-1238		
Fax 1	715-695-3515		

Select Tax — Update

Tax ◉ Yes ○ No — New Tax

Eau Claire	54770	5.500%	5.500%

Pick	Location Jurisdiction	Zip Jurisdiction #	Tax Rate A Tax Rate B	Total Tax Rate
	Eau Claire	54770	5.500%	5.500%
	Menomonie	54701	4.000% 0.500%	4.500%

Cover Page Billing Label

Select Proposal Cover Page Option

1 Show only Client Address

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

(H) 4144250186

Cover Page Billing Label

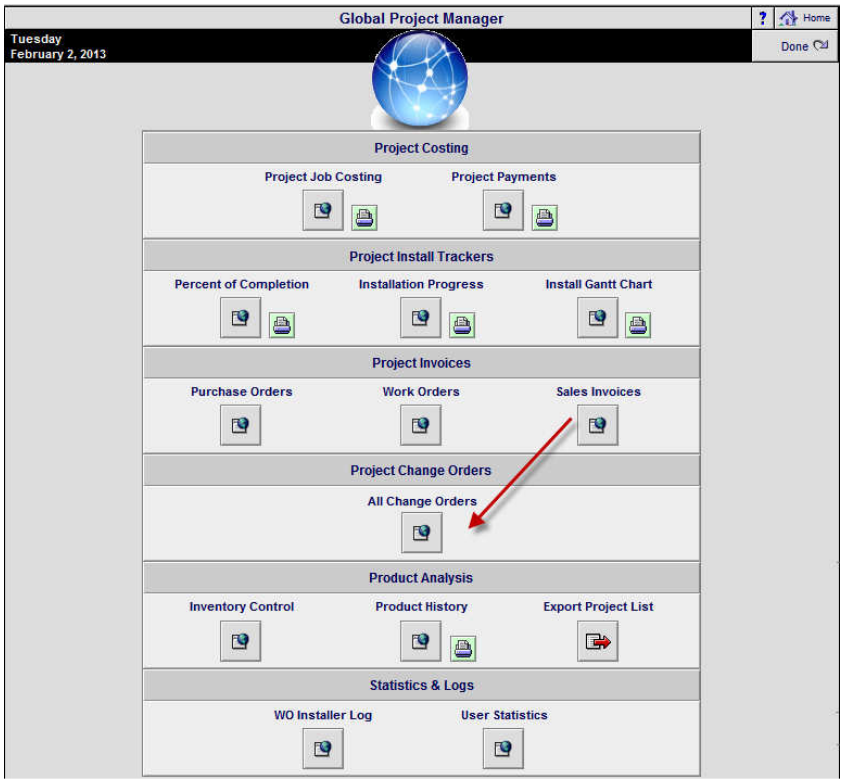
Select Proposal Cover Page Option

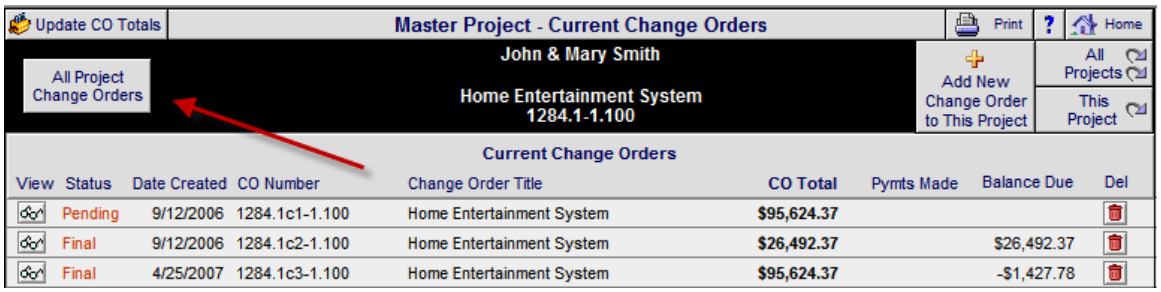
2 Show only Billing Address

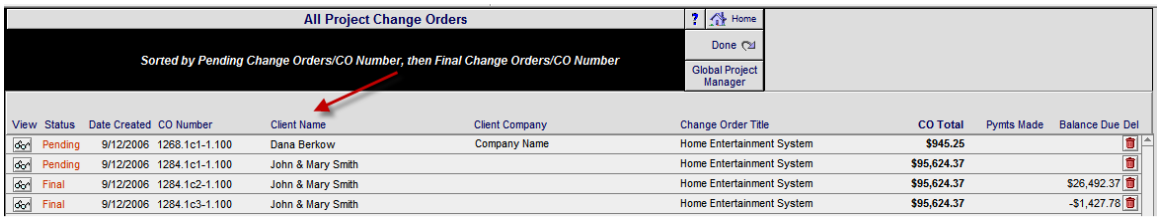
Jim Engandela
Horizon Software
S. 15700 Hwy U.
Strum, WI 54770

Enhancement – Global Project Change Orders

In addition to viewing all Change Orders for a specific Project, you can now view all Pending and Final Change Orders Globally for All Projects. Access to the Global Change Orders is from the Global Project Manager screen or the Project Change Order screen.

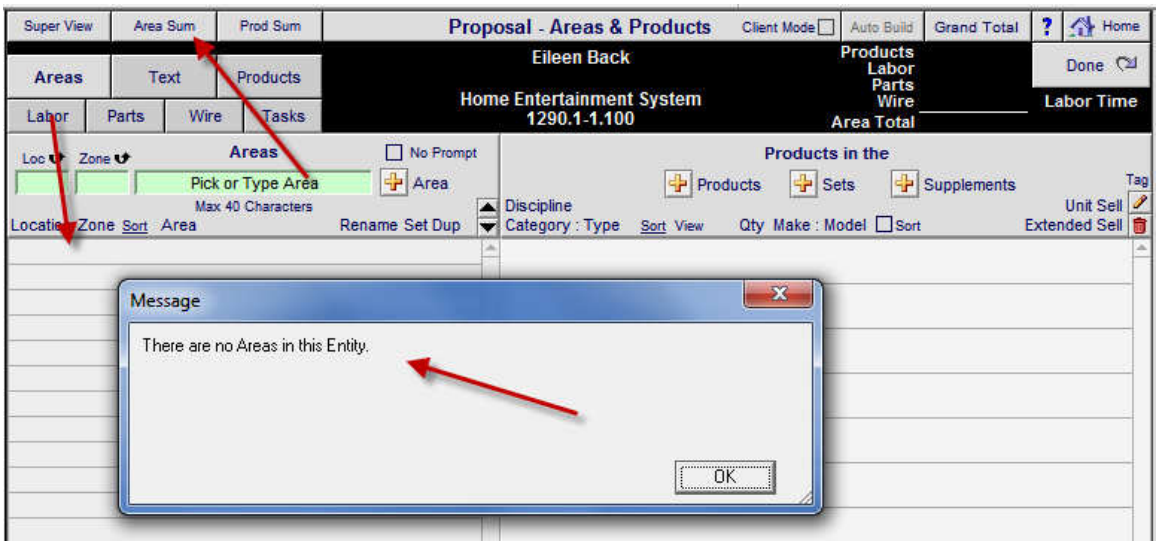






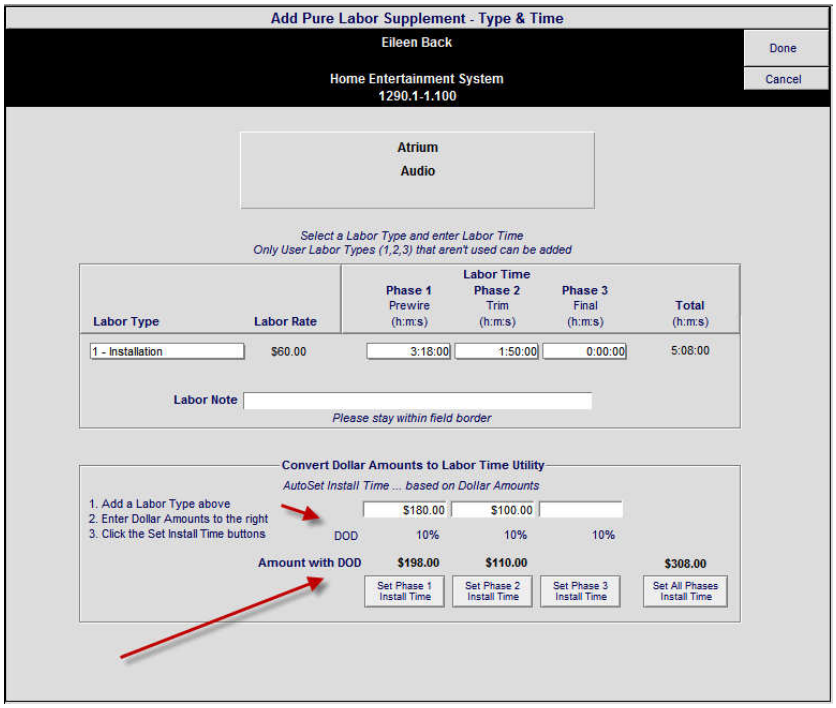
Enhancement – All Entities/Areas & Products/Area Sum: Message for no Areas

You now will get this message when you try to view the Area Sum screen when there are no Areas in your Proposal, Project or Chang e Order.



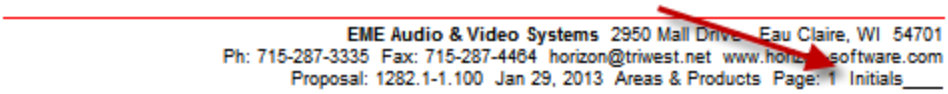
Enhancement – Proposal/Pure Labor Supplement/Add Labor: DOD and Cancel

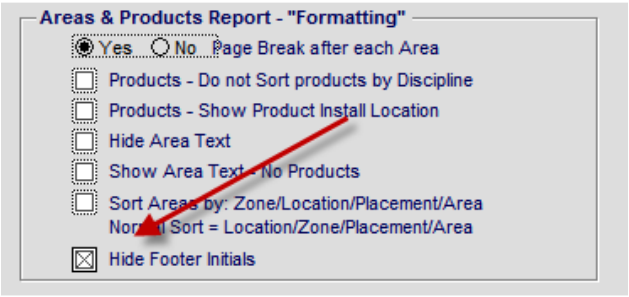
When using the Dollar to Time conversion utility the DOD for each phase is now added automatically to the Dollar Amount and the Install Time. The Cancel button now gives instructions on how to cancel out of this screen without adding Labor.

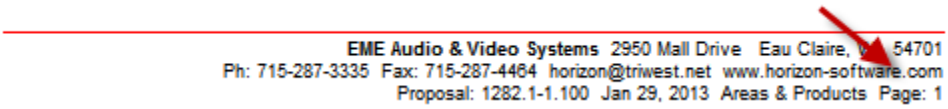


Enhancement – Proposal Reports: Show/Hide Footer Initials Option

You can now choose to Show or Hide the Initials ____ on all Proposal Report footers. This option exists in Master Prefs/Proposals/Print Options for new Proposals and in the Proposal/Print Menu/Print Option screen for existing Proposals. This Enhancement has been made for all regular Proposal Reports and Custom Reports Version 9.9v1.

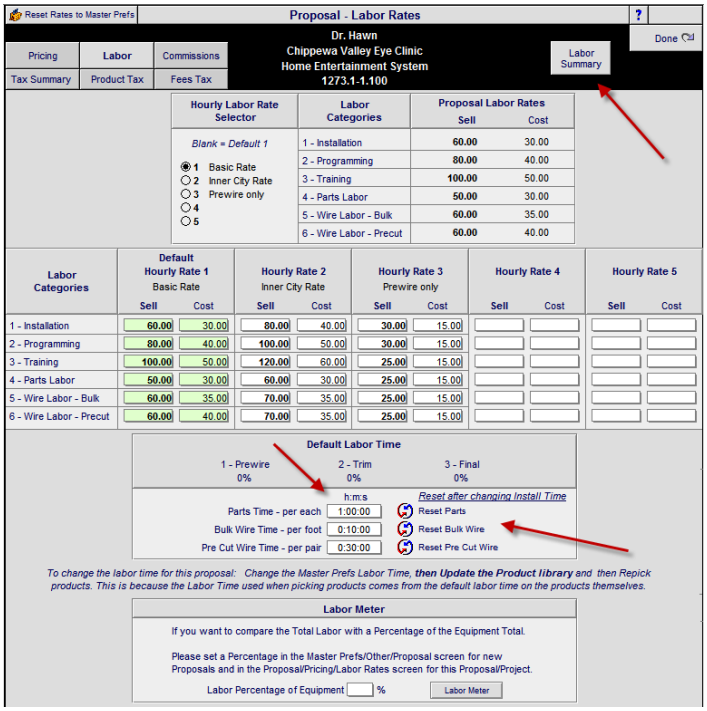






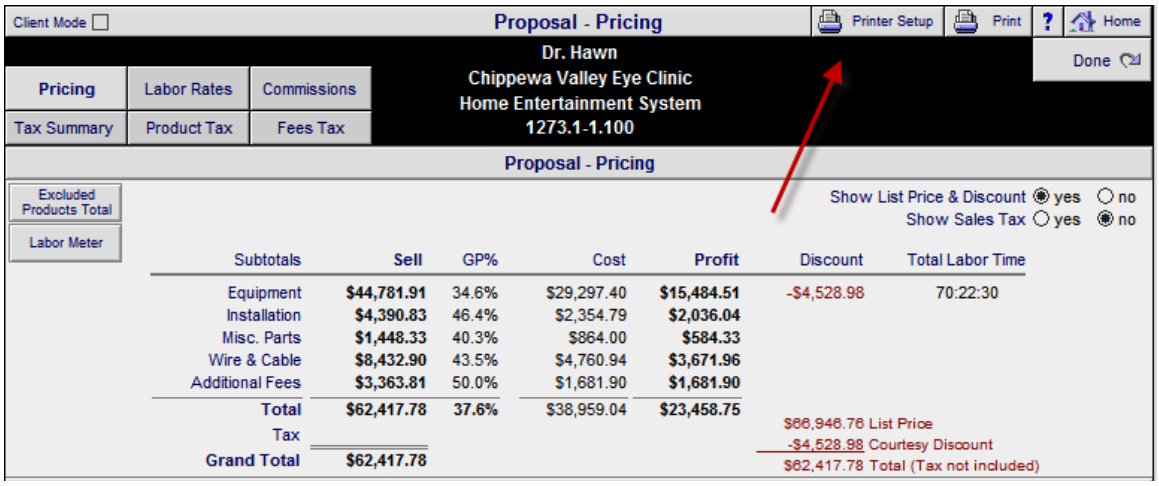
Enhancement – Proposal/Pricing/Labor: Reset Proposal Parts & Wire Default Labor Time

You can now Reset the Parts, Bulk Wire & Pre Cut Wire Labor Times for in a Proposal. You can also access the Labor Summary screen directly from the Labor Rates screen.



Enhancement – Proposal/Project: Pricing Screen Printer Setup button

You can now change the printer to a pdf driver from the Proposal Pricing screen.



Enhancement – Completed Change Orders: Access to Change Orders

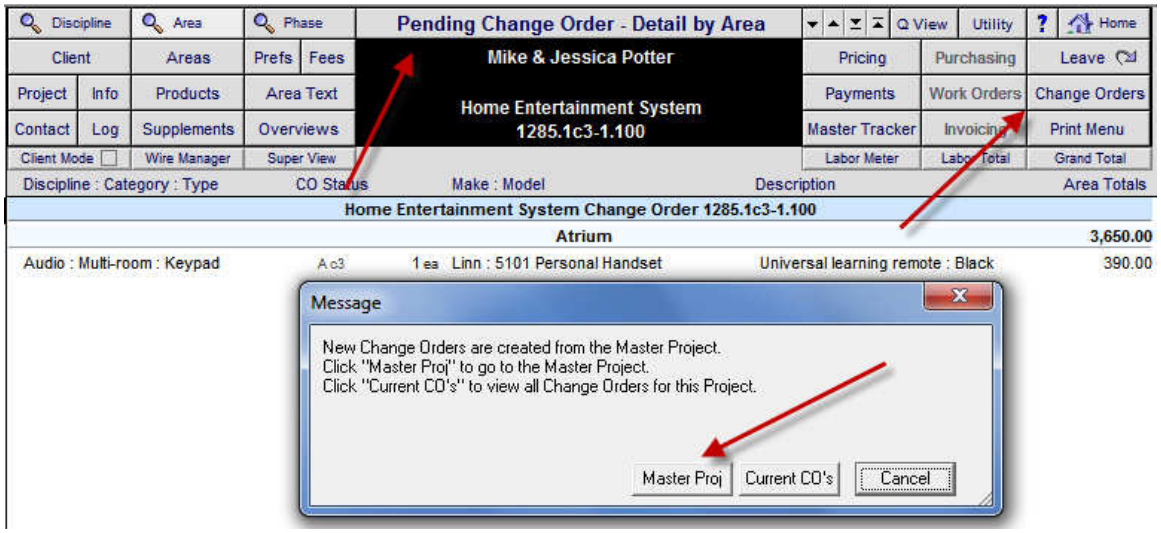
Completed Proposals now have access to Change Orders.

Enhancement – Proposal/Products: Sort by Extended Discount Sell price

You can now click on the underlined Ext Discount header to sort all of the products in a proposal by the Discount amount. This makes checking your discounted items easier.

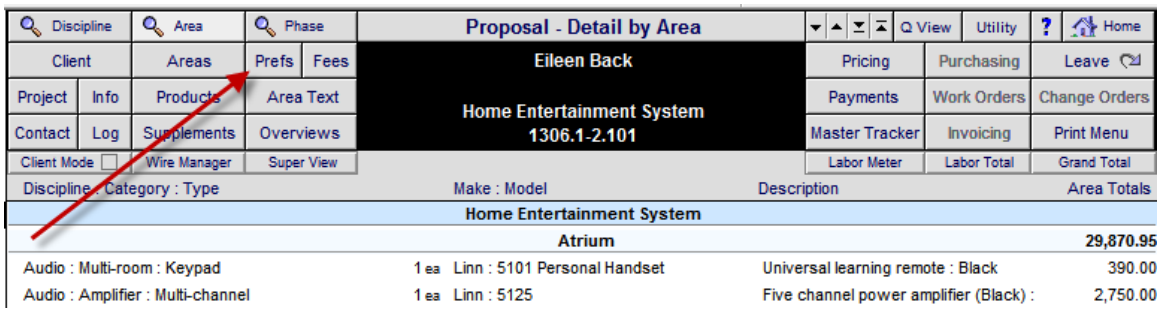
Enhancement – Change Order/Detail: Navigate to the Master Project

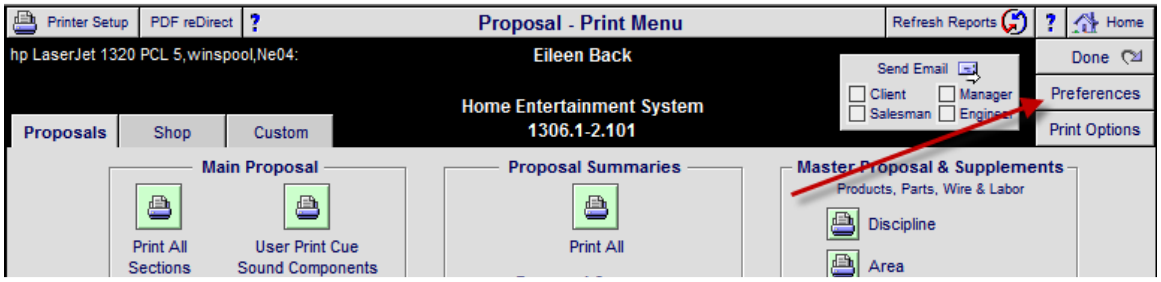
From a Pending or Final Change Order, you can now navigate directly to the Master Project for that CO.



Enhancement – Proposals/Projects Detail: Preferences

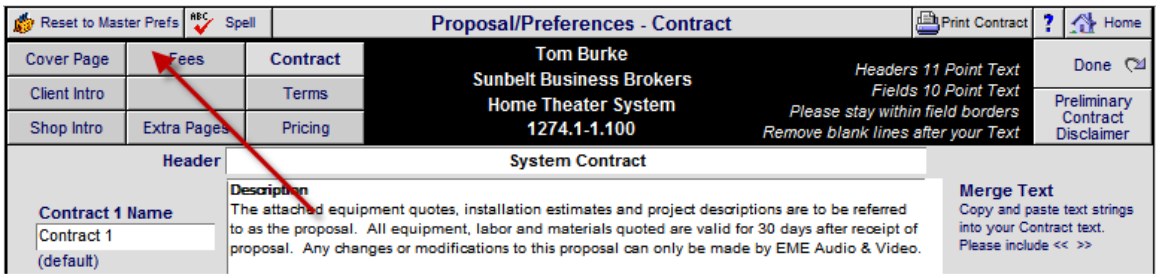
You can now access the Proposal Preferences from the Proposal Detail screen, as well as from the Proposal Print Menu.

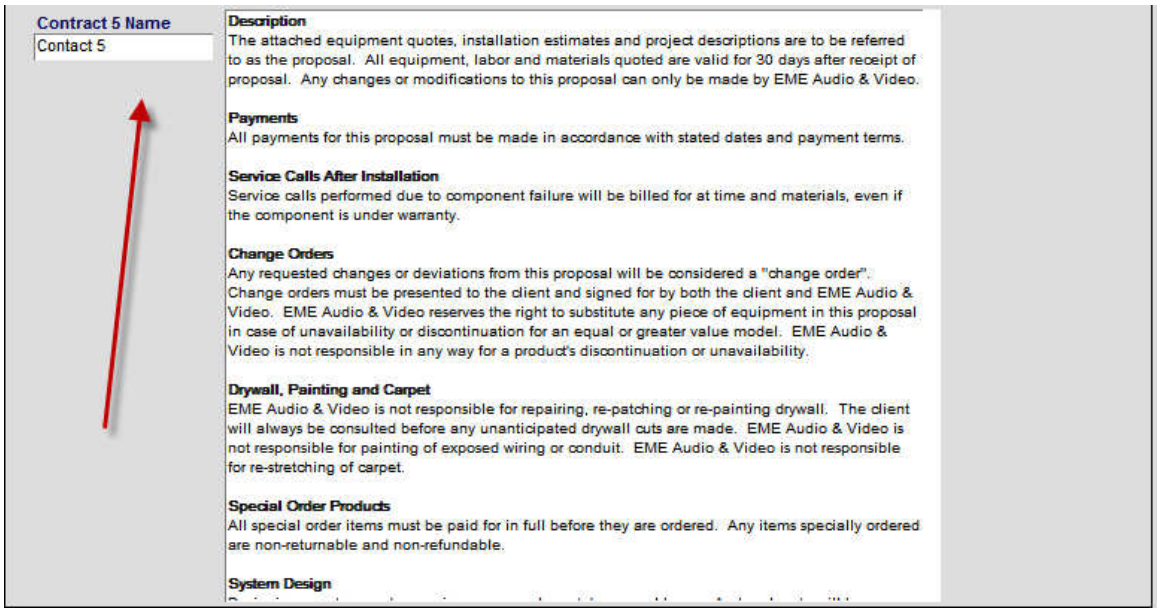




Enhancement – Proposal Contract #5 and Reset to Master Preferences

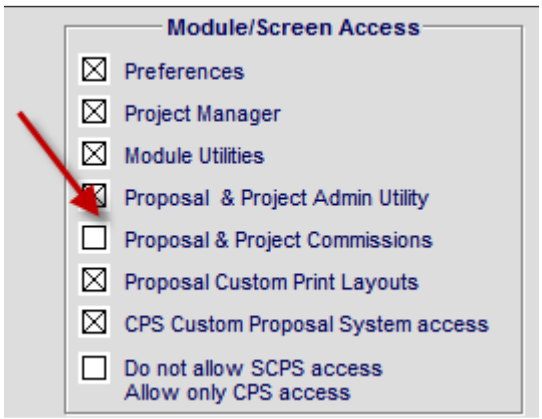
A 5th Contract has been added to Master and Proposal Preferences. All of a Proposal Preferences can be updated to the current status of the Master Preferences from any of the Proposal Preferences screens.

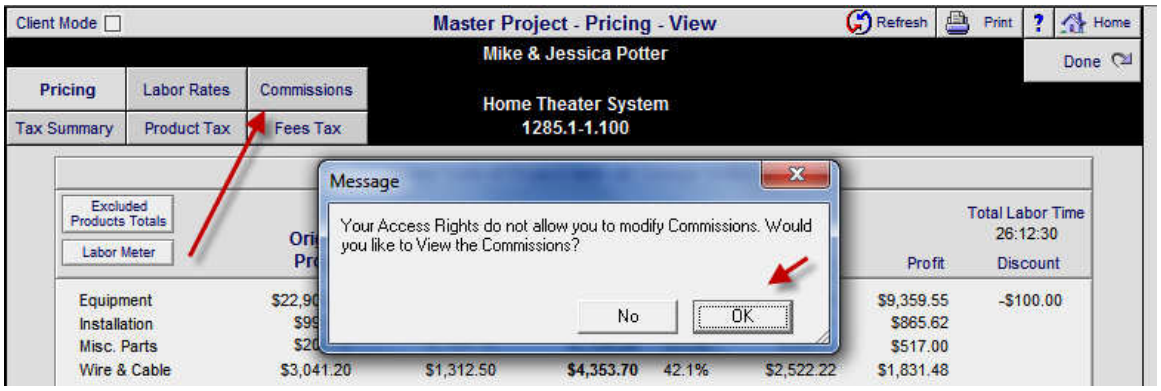


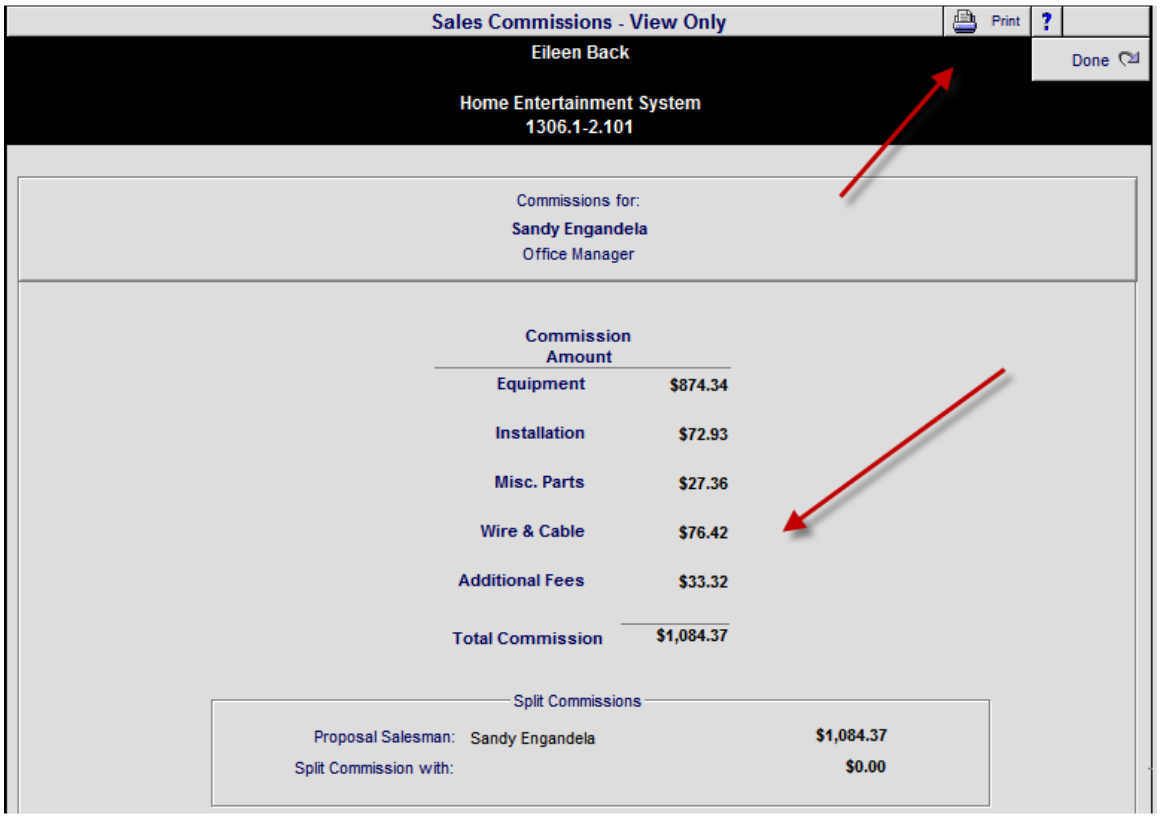


Enhancement – Proposal & Project/Pricing/Commissions: View Only

If a user does not have Access Rights to the Proposal & Project Commission screen, they cannot modify the commissions, but can still view and print the Commissions without seeing costing percentages.

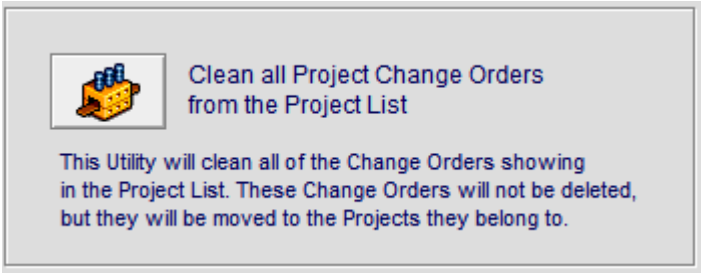






Enhancement – Main Logo Screen/Utility: Clean all Project Change Orders Utility

This Utility will clean any Change Orders showing in the Project List. This will not Delete them, but will return them to the Projects they belong to.



Enhancement – Proposal/Project/Change Order: Pricing Screen rearranged

The Pricing screen sections have been rearranged so that you do not have to scroll down to use the Pricing Adjustment section.

Client Mode ☐ | Proposal - Pricing | Print | ? | Home

Eileen Back | Done

Pricing | Labor Rates | Commissions | Tax Summary | Product Tax | Fees Tax

Home Entertainment System
1306.1-2.101

Proposal - Pricing

Excluded Products Total | Labor Meter

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	22:57:30
Installation	$1,642.50	46.7%	$874.79	$767.71		
Misc. Parts	$1,435.00	40.1%	$859.00	$576.00		
Wire & Cable	$3,883.50	41.4%	$2,274.60	$1,608.90		
Additional Fees	$1,311.28	53.5%	$609.82	$701.46		
Total	$31,182.23	41.2%	$18,324.61	$12,857.62		
Tax	$1,344.19					
Grand Total	$32,526.42					

$31,282.23 List Price
-$100.00 Courtesy Discount
$31,182.23 Total

Proposal Equipment - Price Adjuster

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

Adjustment Type:
Percentage %: ±
Set All Prices to Adjustment

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.

Labor Summary

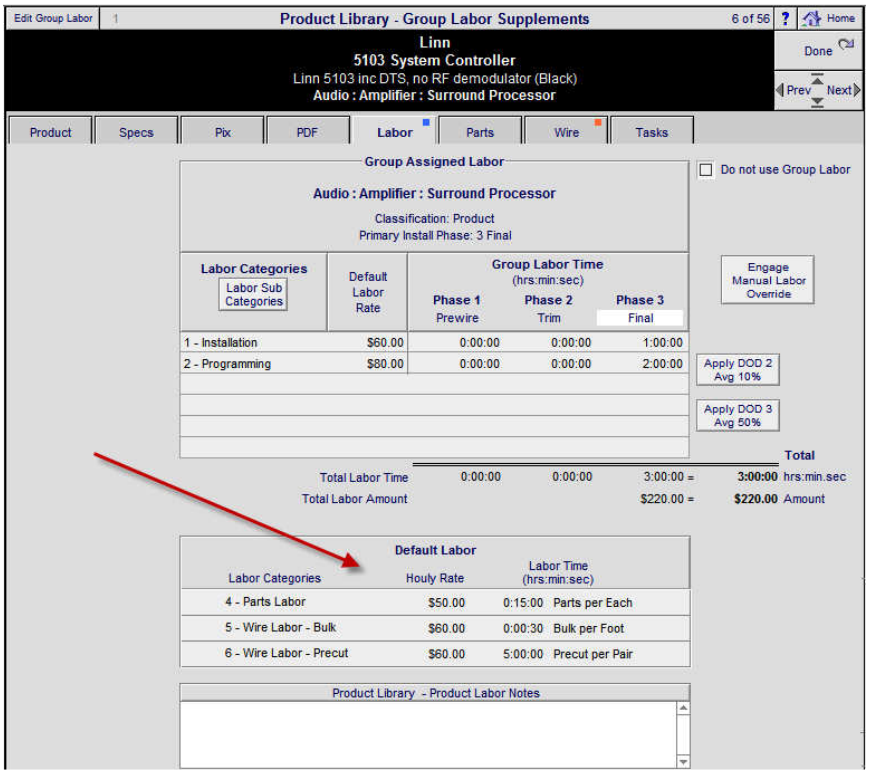
Labor Category	(h:m) Hours	(hourly) Rate	Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	Total
1 - Installation	5:40	$60.00	$30.00	$60.00	$250.00	$340.00
2 - Programming	1:30	$80.00			$120.00	$120.00
3 - Training	6:15	$100.00		$500.00	$125.00	$625.00
4 - Parts Labor	1:30	$50.00		$37.50	$37.50	$75.00
5 - Wire Labor - Bulk	6:52	$60.00	$412.50			$412.50
6 - Wire Labor - Precut	1:10	$60.00	$5.00		$65.00	$70.00
Total Amount			$447.50	$597.50	$597.50	$1,642.50
(h:m) Total Hours			7:27	6:45	8:45	22:57

Enhancement – Product Library Sets": Hidden or Discountued Orphaned Products

Two additional indicator balls show which Product Subsets are Hidden or Discountinued products in the Product library.

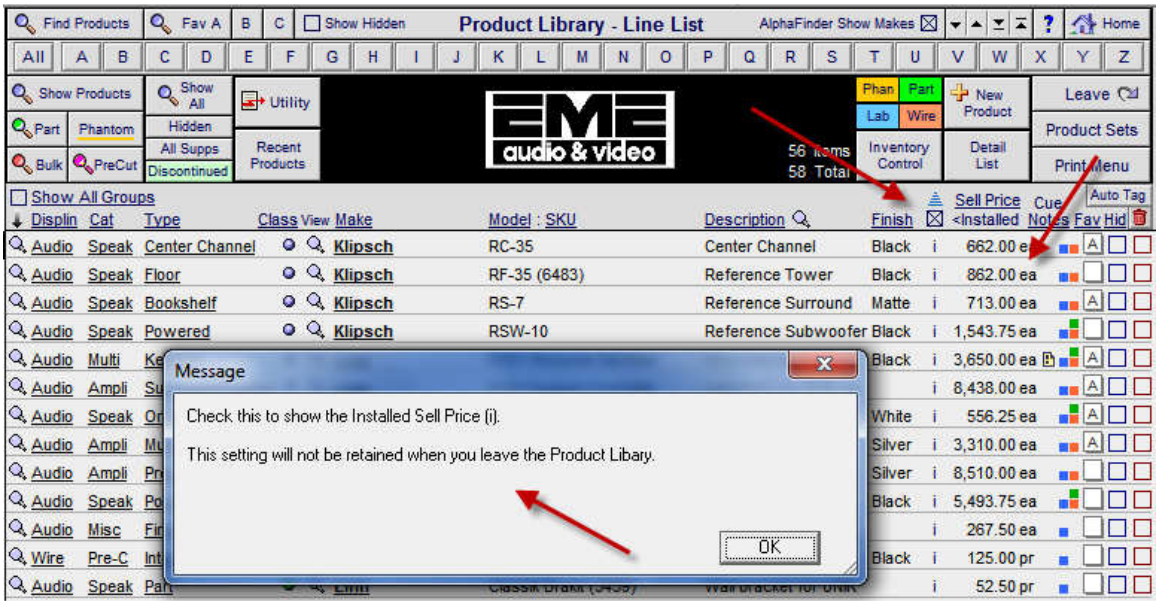
Enhancement – Product Library/Labor, Parts, Wire: Display Default Parts & Wire Labor Time

The Default Labor Time for Parts and Wire now show in the Product Library Parts and Wire screens.



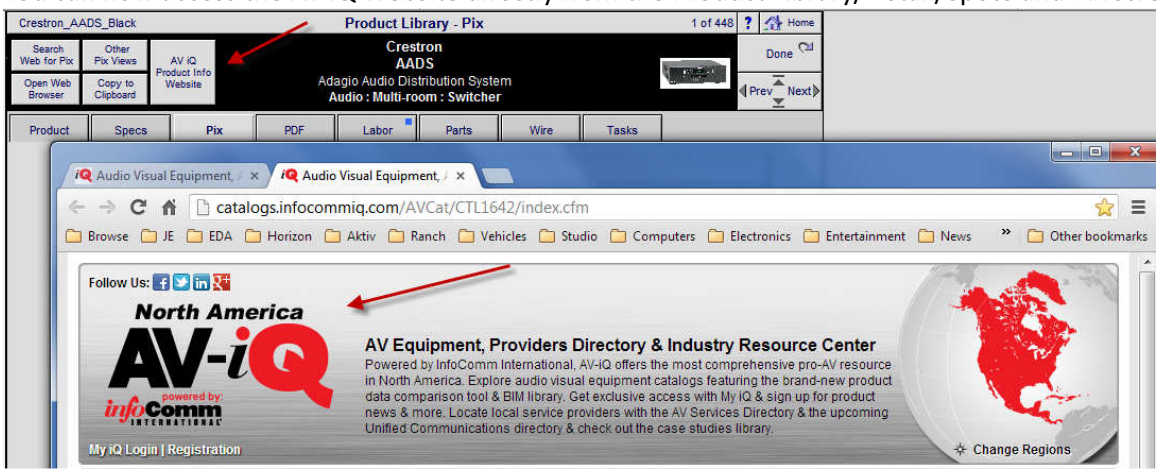
Enhancement – Product Library: Show Installed Price Option

You can now check the <Installed Price box to see the Installed Prices on all Products. The Main Line List and all Pick screens have been modified to include this new feature.



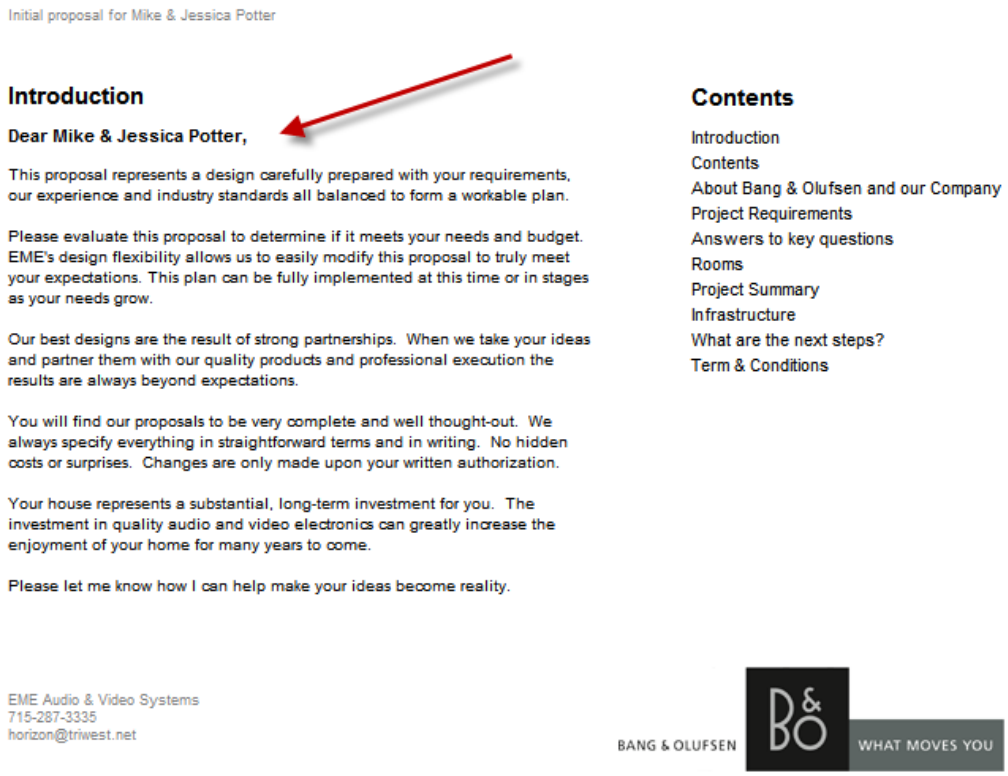
Enhancement – Product Library: Direct Access to AV iQ Product Info Website

You can now access the AV iQ Website directly from the Product Library/Detail/Specs and Pix screens.



Enhancement – Bang & Olufsen Reports 9.9v1: Change Salutation on Client Page

Salutation on client intro page; "Dear Last Name" > changed to "Dear First Name Last Name"



Initial proposal for Mike & Jessica Potter

Introduction

Dear Mike & Jessica Potter,

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

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.

Your house represents a substantial, long-term investment for you. The investment in quality audio and video electronics can greatly increase the enjoyment of your home for many years to come.

Please let me know how I can help make your ideas become reality.

EME Audio & Video Systems
715-287-3335
horizon@triwest.net

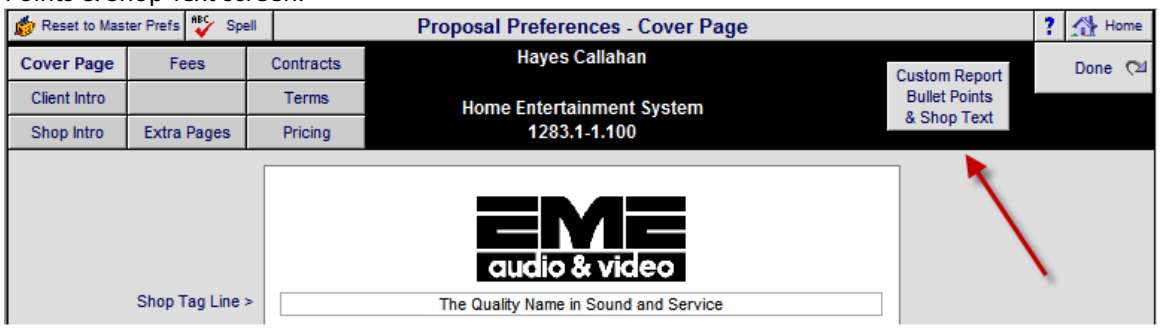
Contents

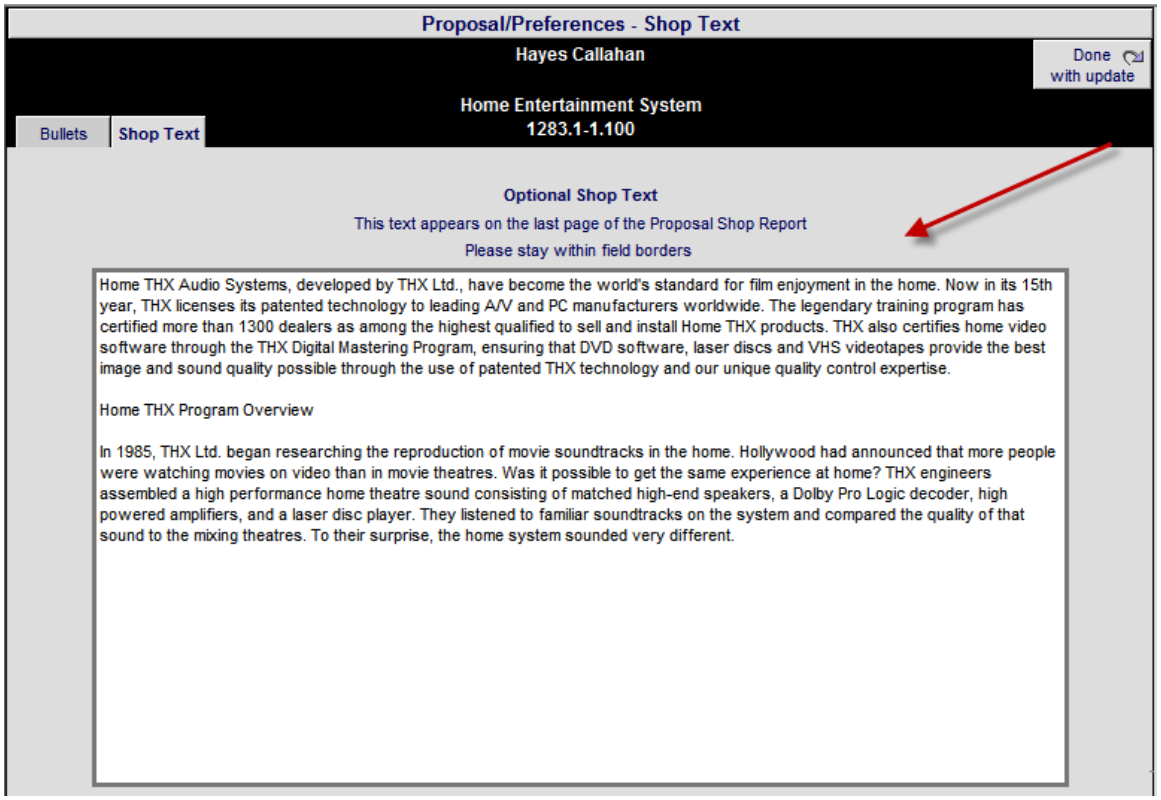
Introduction
Contents
About Bang & Olufsen and our Company
Project Requirements
Answers to key questions
Rooms
Project Summary
Infrastructure
What are the next steps?
Term & Conditions

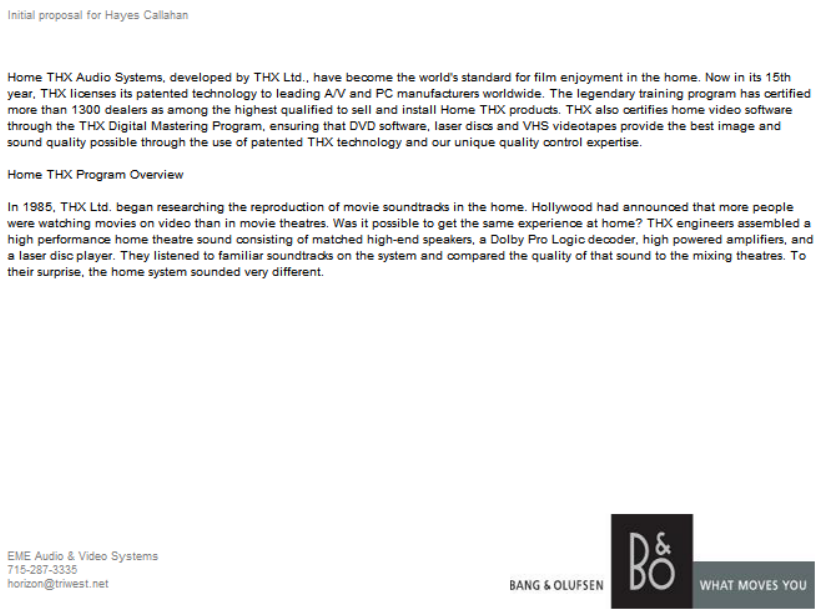
BANG & OLUFSEN WHAT MOVES YOU

Enhancement – Bang & Olufsen Reports 9.9v1: Optional Shop Report Text

The last page of the Custom Proposal Reports-Shop section can now contain user entered/modified text. This text can be added to the Master Prefs/Proposals/Shop Text screen and it will automatically be added to new proposal (as well as being edited in the proposal). Or the user can enter text specifically for a Proposal in the Print Menu/Prefs/Custom Report Bullet Points & Shop Text screen.

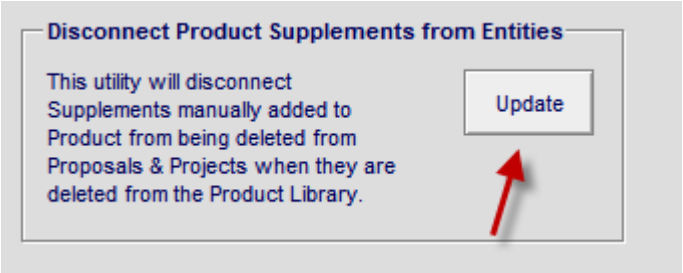






Critical Fix – Proposal/Parts & Wire Supplement Labor: Stop deletion of Labor Records

If a Product Library/Manually added Part or Wire supplement is deleted, the Labor for those Parts or Wire in the Proposal or Project is no longer deleted. Upgrade Routine 41 will disconnects existing Entity Labor from the Product Library Manually entered Parts & Wire. This routine is automatically applied during the upgrade to 9.9v1 so it does not have to be manually run.

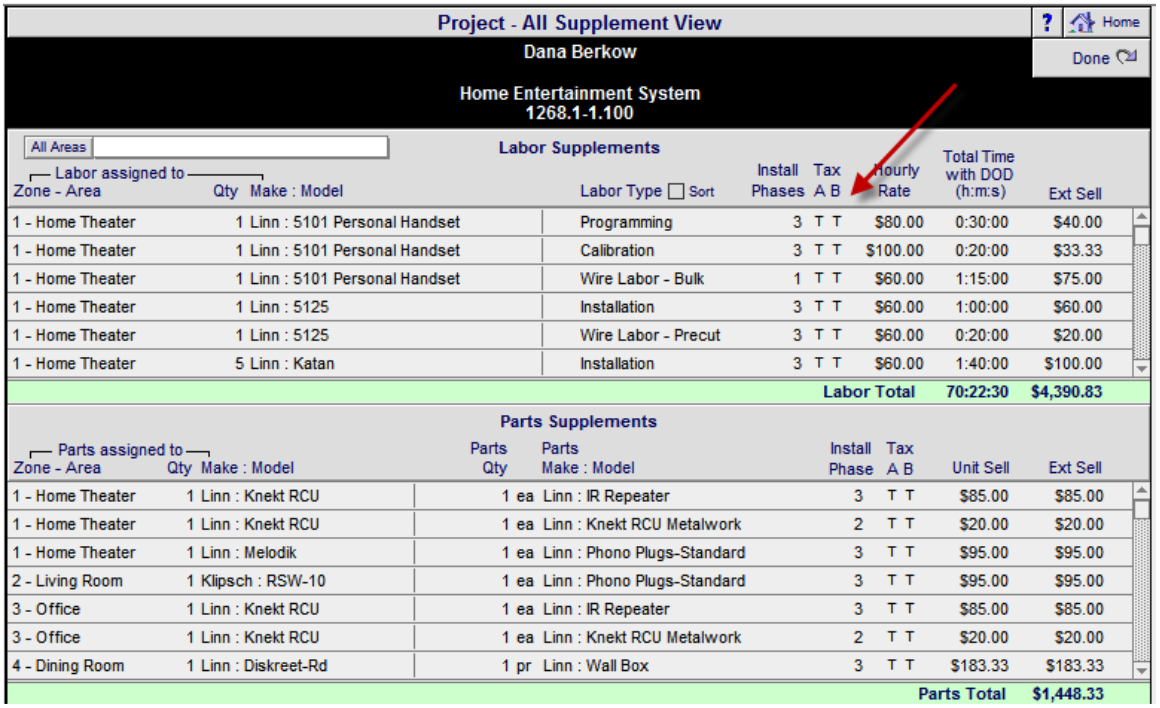


Fix – Proposal/Pricing & Print Menu: Remove Error Message

When entering the Proposal Pricing and Print Menu screens an error message indicating if no records have been found has been removed.

Fix – Project/All Supplements View: Remove ability to modify Supplements

Project Supplements should not be able to be changed (except with Change Orders), so the ability to modify field data has been removed.



Project - All Supplement View

Dana Berkow

Home Entertainment System
1268.1-1.100

Labor Supplements

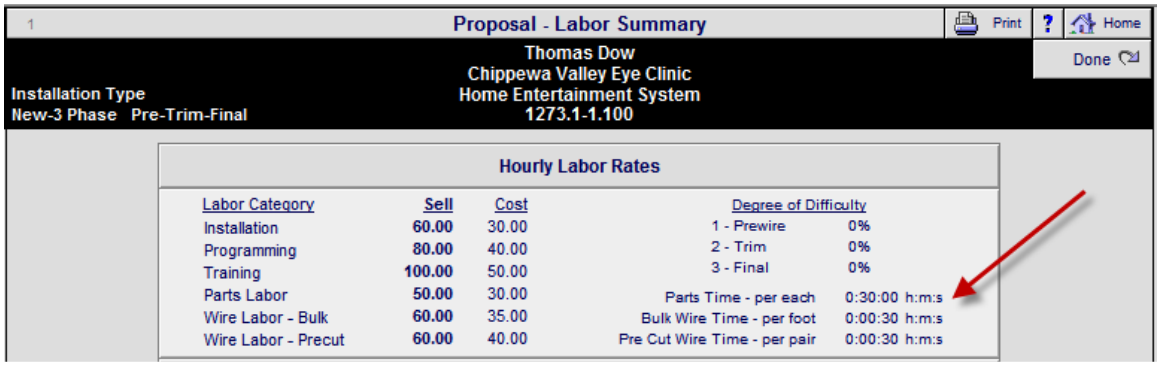
Zone - Area	Qty	Make : Model	Labor Type	Install Phases	Tax A B	Hourly Rate	Total Time with DOD (h:m:s)	Ext Sell
1 - Home Theater	1	Linn : 5101 Personal Handset	Programming	3	T T	$80.00	0:30:00	$40.00
1 - Home Theater	1	Linn : 5101 Personal Handset	Calibration	3	T T	$100.00	0:20:00	$33.33
1 - Home Theater	1	Linn : 5101 Personal Handset	Wire Labor - Bulk	1	T T	$60.00	1:15:00	$75.00
1 - Home Theater	1	Linn : 5125	Installation	3	T T	$60.00	1:00:00	$60.00
1 - Home Theater	1	Linn : 5125	Wire Labor - Precut	3	T T	$60.00	0:20:00	$20.00
1 - Home Theater	5	Linn : Katan	Installation	3	T T	$60.00	1:40:00	$100.00
						Labor Total	70:22:30	$4,390.83

Parts Supplements

Zone - Area	Qty	Make : Model	Parts Qty	Parts Make : Model	Install Phase	Tax A B	Unit Sell	Ext Sell
1 - Home Theater	1	Linn : Knekt RCU	1 ea	Linn : IR Repeater	3	T T	$85.00	$85.00
1 - Home Theater	1	Linn : Knekt RCU	1 ea	Linn : Knekt RCU Metalwork	2	T T	$20.00	$20.00
1 - Home Theater	1	Linn : Melodik	1 ea	Linn : Phono Plugs-Standard	3	T T	$95.00	$95.00
2 - Living Room	1	Klipsch : RSW-10	1 ea	Linn : Phono Plugs-Standard	3	T T	$95.00	$95.00
3 - Office	1	Linn : Knekt RCU	1 ea	Linn : IR Repeater	3	T T	$85.00	$85.00
3 - Office	1	Linn : Knekt RCU	1 ea	Linn : Knekt RCU Metalwork	2	T T	$20.00	$20.00
4 - Dining Room	1	Linn : Diskreet-Rd	1 pr	Linn : Wall Box	3	T T	$183.33	$183.33
							Parts Total	$1,448.33

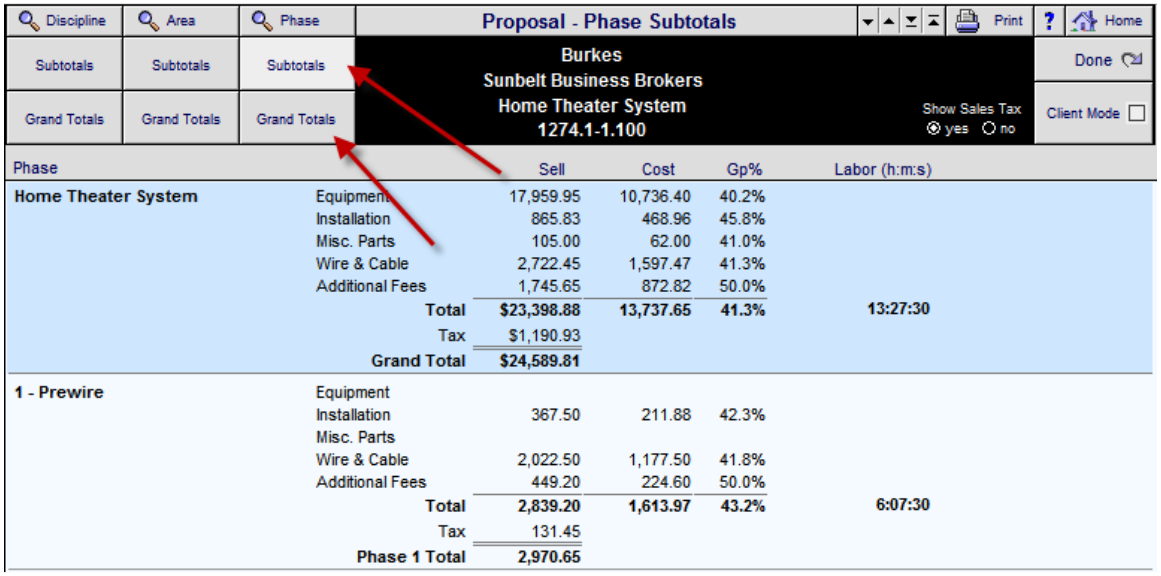
Fix – Proposal/Project/Labor Summary: Display Unit Labor Times

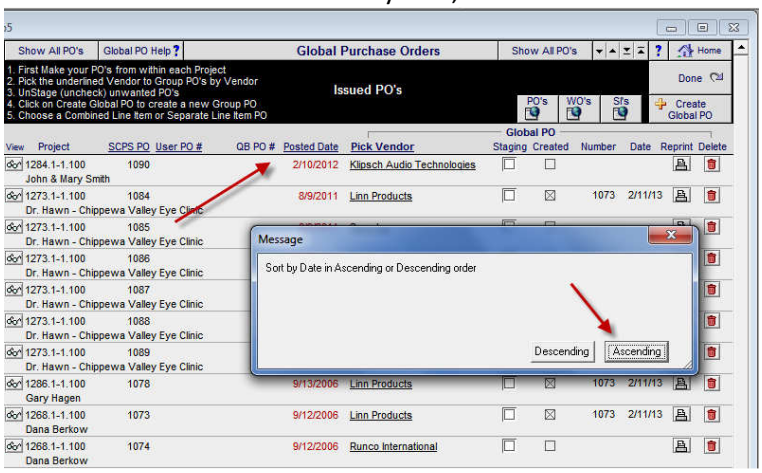
Parts & Wire Labor Time per item/foot now displays the seconds.



Fix – Proposal/Phase Sub & Grand Totals: Refresh screen & Endless Loop

The Phase Subtotals and Grand Totals routine was causing a double screen refresh and occasionally an endless loop. This has been fixed.



Fix – Global Project Manager/Global PO's: Fix Date Sort Order

The Date sort order now sorts by Year, Month and Date instead of Date, Month and Year.