



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.

Jim Engandela

President/Developer

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.

Proposal - Product Detail 1 of 7 Home

Neil & Gerri Werle
1281.1-1.100
Linn 5125

Areas: Text Products
Labor Parts Wire Tasks

Product Qty: 1
Make: Linn Sell Price: \$2,750.00 ea
Model: 5125
SKU:
Finish: Silver
Description: Five channel power amplifier (Black)
Features: The Linn AV 5125 5-channel Class V modular power amplifier features the latest Linn switch mode power supply and

Message
Do you want to Reset the Parts & Labor for Only This Product or All Products in this Proposal?

Primary Install Phase: 3 Final
Tax A: T + Tax B: T
Do not Discount ☐ Product Sort: m

Proposal Utility Client Mode ☐ Home

Neil & Gerri Werle
Home Theater System
1281.1-1.100

Proposal Status:

Proposal Export Admin

Caution: These Utilities will permanently alter this Proposal

- Sell this Proposal**
Convert this Proposal into a Project
All Option Products and Supplements will be Deleted from this Proposal when it is converted.
Please uncheck any Option Products you want to include in this Proposal before converting it.
- Update All Proposal Products & Supplements**
All products and supplements (Parts/Wire/Labor) in this Proposal will be completely updated with the same products & supplements from the Product Library.
- Update Only Selected (Tagged) Proposal Products & Supplements**
Only Tagged products and supplements (Parts/Wire/Labor) in this Proposal will be completely updated with the same products & supplements from the Product Library.
- Update Only Proposal Products, Parts & Wire Prices**
This does not update Labor Supplements
- Update Only Proposal Product Info - not Prices**
Product descriptions & specs, etc. but not Prices
- Update Product Groups & Supplements to the Product Library Groups**
This resets the Product Groups and Supplement Disciplines on the products in this proposal
- Reset all Parts & Wire Labor Times in this Proposal to SCPS v11 standard**
Proposals created before v11 may have parts and wire labor times that are not accurate.
Please note that this reset may change the Parts & Wire Install amounts for this Proposal.

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 <input type="checkbox"/> Hide Labor Detail Matrix		Project Service Ticket PT #7205		Ticket Done <input type="checkbox"/> Contact Leave	
Preview				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	Assignments Tech JE Prev Tech LB Project Mgr MR	Appt Requested Date 12/11/2013 Time 6:30 AM
--	--	--

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
---	---	--

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	

eMail Notification <input type="checkbox"/> All <input checked="" type="checkbox"/> Notify Scheduling <input type="checkbox"/> Notify Engineering <input type="checkbox"/> Notify Sales <input type="checkbox"/> 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 ABC ✓
 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				Labor	Unit Price	Ext Price	Tax
Pick	Qty	unit	Make - Model - Description (max 2 lines)	(h:m:s)			A 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.

Find Tickets		POS - Project Service Tickets																▼ ▲ ▼ ▲		Print		? Home													
All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z									
Pending Scheduling	Ticket Type		<div>Project Service Tickets</div> <div>2 Tickets</div> <div> Show All Tickets</div>																				Done												
Scheduled	Billing - New																																		
Ticket Complete	Billing - Released																																		
Review Complete	Done																																		
Show All Tickets																												QT	SI	CO	SO	WO	PO	RA	PT
View	Done	PT Ticket # Project #	Ticket Date Done Date	Client Company	Ticket Type Work Requested	Status	Billing Work Done	Created By Technician	Appointment																										
		PT #7205	12/10/2013	Burkes, Tom & Kelly & Family Sunbelt Business Brokers	New Add a	Pending Scheduling	New Succes	Jim Engandela JE	12/23/2013 2:30 PM																										

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.



User: Jim Engandela

Location: 1 - EME Audio & Video Systems

Add a
New POS

Leave

View
POS Invoices

Quotations



Work Orders



Sales Invoices

Service Orders
Repair & OnSite
with RMAs

Change Orders



Purchase Orders



Credit Memo's

Product
Return AuthorizationView
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 **LeRoy Asher** Labor Time Remaining on Project Totals Left To Install Left to Complete Create WO Leave Home

Wire Manager **1295.1-1.100** Project Time 46:13:30 Products 0 4 Auto Set Qty to Issue View Work Orders

Phase	Zone - Area	Qty Sold	Make
	Discipline	Delivered	CO#
2	Atrium Audio	1 ea	Linn Univ
2	Balcony Audio	2 ea	Linn Univ
2	Computer Room Audio	1 ea	Linn : 5101 Personal Handset Black 1

WO's to Date

Qty	Total Time	Left to	Left to
Installed	Avg Time	Install	Complete
0		0	1
0		0	2
0		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.

Master Prefs - POS - Project Service Ticket

POS 1

POS 2

Alternate

Proj Ticket

?

Home

Done

Install Technician Names

John Smith
Mike Jones
Paul Ward

Install Technician Initials

JE
DS
LB

Notication - eMail Addresses

Scheduling

horizon@trivest.net

Sales

john@trivest.net

Engineering

fred@horizon.net

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.

Labor	Hours	Rate	Amount
Equipment Installation:	4:30:00	80.00	360.00
Total Labor:			4:30:00 Hrs 360.00

Other Charges	Amount
Other Labor	500.00
Tax "Other" Total <input checked="" type="checkbox"/>	Total Other: 500.00

GP% 50.0%

Line Items: 7,500.00

Labor: 360.00

Other: 500.00

Subtotal: 8,360.00

Tax: 440.00

Freight:

Total: 8,800.00

Zero Labor

Tax Location

Eau Claire

A

5.50%

B

Rate

5.50%

Ship:

Refresh

Adjust Tax

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
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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.

Print Setup Delete Quote Duplicate Quote POS - Quotation Pick Price Cue ☐ Sold ☐ ? Home

Print: ☐ Show List Price Column Preview: ☐ Hide Labor Detail Matrix Costing

QUOTATION
QT #7201 1 of 19

Convert Quote to a Sales Invoice ☐ Contact Done ☐ Set Up Prev Next ☐

Label Address 2: ☐ Show ☐ Hide

LeRoy Asher Home 715-985-3833
567 58TH Street
Oakland, CA 94607

LeRoy Asher

12/10/2013

Sales Rep Ship VIA Payment Terms Reference # Quotation Title

Jim Engandela

Quotation prices good for 30 days

Pick	Qty	unit	Product Description (max 2 lines)	Install (h:m:s)	Unit Price	Ext Price	Tax
ea			Crestron : AADS : Adagio Audio Distribution System : Black	1:30:00	2,500.00	0.00	T

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

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

Clients Users Other Views

Vendors Locations

Contractor

EME audio & video

1 of 135 Contacts

New Contact

Leave Print Menu

Add POS or Add Proposal Task Entities View Fav Name Company Category Fav Phone Info Fav

Asher, LeRoy	Client	(H) 715-985-3833
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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.

Change Proposal Creation Date

Creation Date 8/15/2011

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



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

Zone - Area

Master Change Order by 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.

Clear All Area Text		Proposal - Area Text		? ? Home	
Mike & Jessica Potter				Done	
Areas Text Products		Security System 1282.1-1.100		WorkOrder Text	
Labor Parts Wire Tasks					
Pick 1 - Pick Area		2 - Pick Text Category		3 - Pick () Text	
Zone 1 - Basement		Audio			
Zone 1 - Home Theater		Commercial Sound			
		Control			
		Installations			

Service Tickets	Q Show All	Q Phase 1	2	3	Install Work Orders - All - 4 Products				PO	WO	SI	?	Home
WO Text	EME Audio & Video Systems 1288.1-1.100				Labor Time Remaining on Project		Totals	Left To Install	Left to Complete	Auto Set Qty to Issue		Leave	
Wire Manager					Project Time Installed Time		Products	0	5	Create WO		View Work Orders	
WO Products	WO Parts	Q Wire	Sum	Proj	Labor Time Left		Parts	0	4				
						7:05:43	Wire	0	501				
Phase	Zone - Area	Qty Sold	Make : Model				Qty to Issue	Qty Issued	Qty Installed	WO's to Date	Total Time	Left to Install	Left to Complete
	Discipline	Delivered	CO#	Install Description		Finish	Left to Issue						
3	Bathroom 5 Audio	1 ea		Linn : Classik Music-S Integrated CD player/tuner/preamp/power		Silver	1					0	1
3	Bathroom 5 Audio	1 pr		Linn : Katan-C Bookshelf loudspeakers: pair		Cherry	1					0	1
3	Dining Room Audio	1 ea		Klipsch : RS-7 Reference Surround Speaker		Matte	1					0	1
2	Dining Room Automation	2 ea		Linn : Knekt RCU Knekt room control unit		White	2					0	2

Printer Setup	Proposal - WorkOrder - Area Text		?	Home
Print WorkOrder Text Notes	Mike & Jessica Potter		Done	
Security System 1282.1-1.100				
Pick 1 - Pick Area	Project Overview for Entire WorkOrder		ABC ✓	
Zone 1 - Basement Zone 1 - Home Theater	<p>Overview Text with the decor of your home. eme is a licensed thx home theater designer. the thx surround sound system was developed by film director george lucas. mr. lucas was the director of star wars and the producer of the indiana jones movies. most of the action movies created today have been edited and scored at the lucasfilm movie studio called the skywalker ranch in northern california.</p> <p>George lucas has received the prestigious Irving Thalberg award for developing the thx standard for the motion picture industry. this standard enables us to design your home theater to the same exacting standards as a thx film studio and a thx movie theater. your home theater will sound exactly like the studio where the film was produced. you will be able to hear and experience exactly what the director heard when he made the movie.</p> <p>This home theater consists of a big screen tv, a digital surround sound processor, a main music amplifier with # watts of power per channel, a center voice amplifier with aa watts of power. a surround sound amplifier with # watts of power per channel. the sub woofer will be powered by a aa watt amplifier. video sources come from cable and a vcr, as well as a laser disc player. music sources come from a cd player and an fm tuner, as well as a cassette deck. all equipment can be controlled by remote control even with the cabinet doors closed.</p>			
Products in: Zone 1 - Basement	2 - WorkOrder - Area Notes for: Zone 1 - Basement		ABC ✓	
WorkOrder Product Notes - Editable WorkOrder Product Notes - Permanent Linn : 5101 Personal Handset Prod text 5101rod text 5101rod text 5101rod text Permanent Text 5101 Personal handset	Work Order basement text The surround sound speaker compliment includes two front music speakers, one center voice speaker and two rear surround speakers. the sub woofer will provide deep bass for realistic movie reproduction.			
<div> <div>Message</div> <div>Print WO Text Report including Products?</div> <div> <div>No</div> <div>Yes</div> <div>Cancel</div> </div> </div>				

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.

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

Areas & Products

Zone 1 - Home Theater

Audio

Linn : 5125 : Five channel power amplifier (Black) : Silver	1 ea	\$2,337.50
Linn : Katan : Bookshelf loudspeakers: 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:

Proposal - Product Detail - Wire Supplements

Ann & Bob Traaseth
1279.1-1.100

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

1 of 7 Restore Labor ? Home

Areas Text Products Labor Parts Wire Tasks

Product Specs Pix - PDF's Labor Parts Wire Tasks 1 - Home Theater

Wire Make Model Add

Only products classified as "Wire" can be added

Wire & Cable for Product Qty 1 ea

Wire & Cable are Itemized 5000 Sq Ft Building Size

Class	Bulk Run Type	Total Wire Qty	Unit	Wire Make	Model/Description	No Labor	Install Phase	Unit h:m:s	Total h:m:s	Unit Cost	Unit Sell	Ext Sell
Bulk	Home	150 M	Linn	K10 Cable			1	0:00:30	1:15:00	3.00	5.00	750.00
Bulk	Home	150 ft	Monster	16/2 Spkr Wire			1	0:00:30	1:15:00	0.15	0.45	67.50
Bulk	Home	150 ft	Monster	16/2 Spkr Wire			1	0:00:30	1:15:00	0.15	0.45	67.50
Bulk	Room	75 ft	Monster	MVQUAD-B DB EZ500			1	0:00:30	0:37:30	0.60	1.80	135.00
Pre-Cut		1 pr	Linn	Black Interconnect			3	0:00:30	0:00:30	72.00	120.00	120.00
Pre-Cut		1 pr	Linn									
Pre-Cut		1 pr	Linn									

Message

The Labor associated with this Wire has been updated.

OK

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,

Proposal - Wire Supplements Phantom = Adjust Bulk Wire - Home Runs 5000 Sq Ft Update 150 ft per Home Run Done

Ann & Bob Traaseth

Home Automation 1279.1-1.100

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

Itemized Wires = Yes Wire Total: \$3,041.20

Zone - Area	Qty	Make : Model	View Edit	Class Sort	Bulk Run Type	Total Wire Qty	Wire & Cable Make : Model	No Labor Phz A B	Tax	Unit Sell	Ext Sell
1 - Home Theater	1	Linn : 5101 Personal	Q	Bulk	Home	150 m	Linn : K10 Cable	1	T T	\$5.00	\$750.00
1 - Home Theater	1	Linn : 5125	Q	Pre-Cut		1 pr	Linn : Black Interconnect	3	T T	\$120.00	\$120.00
1 - Home Theater	1	Linn : 5125	Q	Pre-Cut		1 pr	Linn : Black Interconnect	3	T T	\$120.00	\$120.00
1 - Home Theater	1	Linn : 5125									
1 - Home Theater	1	Linn : Katan									
1 - Home Theater	1	Linn : Katan									
1 - Home Theater	1	Linn : Katan									
1 - Home Theater	1	Linn : Katan									
1 - Home Theater	1	Linn : Katan									

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.

OK

Product Update Utilities to run if you wish.

Proposal Utility Client Mode ? Home

Ann & Bob Traaseth

Home Automation 1279.1-1.100

Caution: These Utilities will permanently alter this Proposal

Proposal Export Admin

Sell this Proposal
Convert this Proposal into a Project
All Option Products and Supplements will be Deleted from this Proposal when it is converted.
Please uncheck any Option Products you want to include in this Proposal before converting it.

Update All Proposal Products & Supplements
All products and supplements (Parts/Wire/Labor) in this Proposal will be completely updated with the same products & supplements from the Product Library

Update Only Selected (Tagged) Proposal Products & Supplements
Only Tagged products and supplements (Parts/Wire/Labor) in this Proposal will be completely updated with the same products & supplements from the Product Library

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.

Purchase Orders - All - 7 Products PO WO SI ? Home

Mike & Jessica Potter

1285.1-1.100

Products 11

Global Buy Pkg Off

PO Utilities

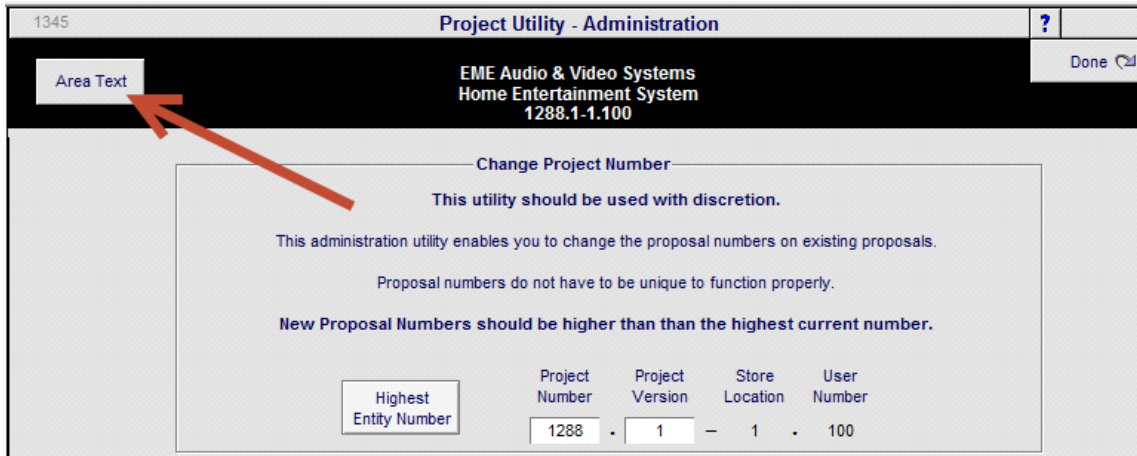
PO Products PO Parts PO Wire Sum Proj Orphan

Auto Set PO Qty View P.O.'s

Phase	Zone - Area	Qty Sold	Make : Model	Finish	Alt-x	Vendor ?	Qty Staged On Hand	To Order Qty	Enter PO Qty	Sum Mode - PO Status	Ordered Staged	Recvd to date
3		1 ea	Linn : 5101 Personal Handset	Black		Linn Products		1				
3		1 ea	Linn : 5125	Silver		Linn Products		1				
3		5	Linn : Katan	Black		Linn Products		5				
3		5 pr	Linn : Katan	Black		Linn Products		5				
2		1 ea	Linn : Knekt RCU	White		Linn Products		1				

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.



1345 Project Utility - Administration ? Done

EME Audio & Video Systems
Home Entertainment System
1288.1-1.100

Change Project Number

This utility should be used with discretion.

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

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

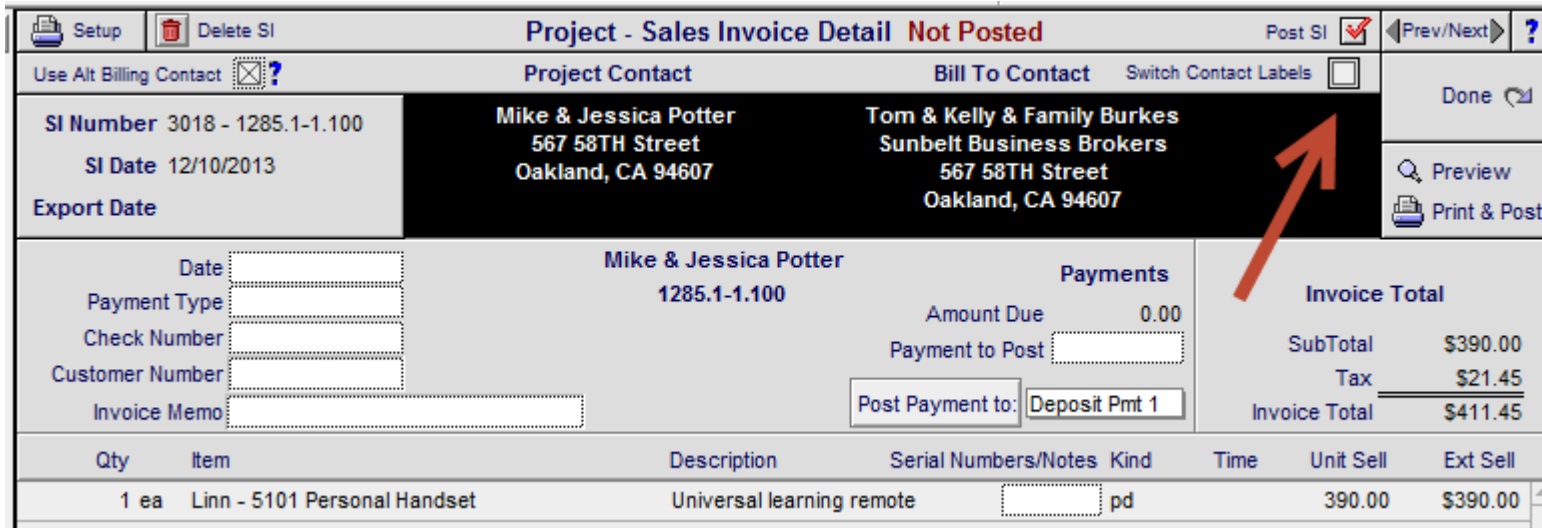
New Proposal Numbers should be higher than the highest current number.

Highest Entity Number

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

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.



Setup Delete SI Project - Sales Invoice Detail Not Posted Post SI [X] Prev/Next ?

Use Alt Billing Contact [X] ? Project Contact Bill To Contact Switch Contact Labels [] Done

SI Number 3018 - 1285.1-1.100 Mike & Jessica Potter Tom & Kelly & Family Burkes
SI Date 12/10/2013 567 58TH Street Sunbelt Business Brokers
Export Date Oakland, CA 94607 567 58TH Street
Oakland, CA 94607

Date Mike & Jessica Potter Payments Invoice Total
Payment Type 1285.1-1.100 Amount Due 0.00 SubTotal \$390.00
Check Number Payment to Post Tax \$21.45
Customer Number Post Payment to: Deposit Pmt 1 Invoice Total \$411.45
Invoice Memo

Qty	Item	Description	Serial Numbers/Notes	Kind	Time	Unit Sell	Ext Sell
1 ea	Linn - 5101 Personal Handset	Universal learning remote		pd		390.00	\$390.00

Setup Delete SI **Project - Sales Invoice Detail Not Posted** Post SI ☒ Prev/Next ?

Use Alt Billing Contact ☒ ? **Project Contact** **Bill To Contact** Switch Contact Labels ☒ Done

SI Number 3018 - 1285.1-1.100 **Tom & Kelly & Family Burkes** **Mike & Jessica Potter**
 SI Date 12/10/2013 Sunbelt Business Brokers 567 58TH Street 567 58TH Street
 Export Date Oakland, CA 94607 Oakland, CA 94607

Mike & Jessica Potter
 1285.1-1.100

Payments
 Amount Due 0.00
 Payment to Post
 Post Payment to: Deposit Pmt 1

Invoice Total
 SubTotal \$390.00
 Tax \$21.45
 Invoice Total \$411.45

Qty	Item	Description	Serial Numbers/Notes	Kind	Time	Unit Sell	Ext Sell
1 ea	Linn - 5101 Personal Handset	Universal learning remote		pd		390.00	\$390.00

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.

"Do Not Allow if Checked" Access Rights

☐ Do not allow SCPS access
Allow only CPS access

☐ Do not allow Sell Price
Less than Minimum Sell

☒ Do not allow Access to the
Proposal Print Option screen.

☒ Do not allow Access to the
Proposal Preferences screen.

Printer Setup PDF reDirect Copy ? **Proposal - Print Menu** Refresh Reports ? ? Home

PDF reDirect Pro v2, winspool, Ne01: **LeRoy Asher**

Proposals Projects Costing Custom

Send Email ☒ Client ☐ Manager ☐ Salesman ☐ Engineer

Done Prop Prefs Print Options

Main Proposal Proposal Summaries Master Proposal & Supplements
 Products, Parts, Wire & Labor

Print All User Print Cue Sound Component Discipline Area

Proposal Sections

Cover Page Client Intro Shop Info Overviews Areas & Products A&P Preliminary Con with Area Subtotals, Price Fixing Pricing Policy

Message

Your Access Rights do not allow you to enter the Print Options screen.

OK

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.

Master Prefs - POS 2				? Home
POS 1	POS 2	Alternate	Proj Ticket	Done
<div style="border: 1px solid #ccc; margin-bottom: 5px; padding: 5px;"> <p style="text-align: center; margin: 0;">Quotation Comments</p> <p style="font-size: small; margin: 0;">All Labor, Trip Charges and Materials listed within the invoice are estimates only. Any changes will be added to the existing invoice or a new invoice will be created that is due at the completion of the installation. All MasterCard / Visa transactions over \$5,000.00 will be assessed 2% transaction fee. All American Express and Discover transactions over \$5,000.00 will be assessed a 4% transaction fee.</p> </div> <div style="border: 1px solid #ccc; margin-bottom: 5px; padding: 5px;"> <p style="text-align: center; margin: 0;">Invoice Comments</p> <p style="font-size: small; margin: 0;">All Labor, Trip Charges and Materials listed within the invoice are estimates only. Any changes will be added to the existing invoice or a new invoice will be created that is due at the completion of the installation. All MasterCard / Visa transactions over \$5,000.00 will be assessed 2% transaction fee. All American Express and Discover transactions over \$5,000.00 will be assessed a 4% transaction fee.</p> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p style="text-align: center; margin: 0;">Service Order - Comments</p> <p style="font-size: small; margin: 0;">All Labor, Trip Charges and Materials listed within the invoice are estimates only. Any changes will be added to the existing invoice or a new invoice will be created that is due at the completion of the installation. All MasterCard / Visa transactions over \$5,000.00 will be assessed 2% transaction fee. All American Express and Discover transactions over \$5,000.00 will be assessed a 4% transaction fee.</p> </div>				

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.

Master Prefs - Other - Projects 2						? Home
Proposal 1	Projects 1	Products 1	Misc 1	3rd Party 1	Counters	Done
Proposal 2	Projects 2	Products 2	Misc 2	3rd Party 2	Graphics	
<div style="border: 1px solid #ccc; margin: 10px auto; width: 80%; padding: 10px;"> <p style="text-align: center; margin: 0;">Change Order Preferences</p> <div style="margin-top: 10px;"> <div style="display: flex; align-items: center; margin-bottom: 5px;"> <input type="checkbox"/> <div style="margin-left: 5px; font-size: small;">Show the Original Project Area Text in addition to the CO Area Text.</div> </div> <div style="display: flex; align-items: center; margin-bottom: 5px;"> <input type="checkbox"/> <div style="margin-left: 5px; font-size: small;">Do Not Show the Change Order Numbers on the Areas & Products Report (global pref)</div> </div> <div style="display: flex; align-items: center; margin-bottom: 5px;"> <input type="checkbox"/> <div style="margin-left: 5px; font-size: small;">Always Add Default Fees to a new Change Order and suppress the user pop up option.</div> </div> <div style="display: flex; align-items: center; margin-bottom: 5px;"> <input type="checkbox"/> <div style="margin-left: 5px; font-size: small;">Always use CO Default Payment plan to a new Change Order and suppress the user pop up option.</div> </div> <div style="display: flex; align-items: center;"> <input checked="" type="checkbox"/> <div style="margin-left: 5px; font-size: small;">Do Not Show Payment Credit Card Info Line below the Client Signature on the CO Invoice This Option is Global for all Change Orders in SCPS</div> </div> </div> </div>						

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.

Itemize Bulk & Precut Wire Supplements

☐ Yes
☒ No (faster)

Itemizing Wire creates a separate Wire record for each piece of wire.
Not Itemizing Wire sums like kind Wire records into one Wire record.

Select "Yes" to Itemize if you plan on using the Project Wire Managem features
such as Wire Labels and Punch Lists. Otherwise select "No".

SmartPartner SOFTWARE

High Definition Proposal & Project Management System

Sort 

1 - Select User

#	Location	User	#	Level
1	EME Audio & Video Systems	Dave Dowling	51	Adm
1	EME Audio & Video Systems	Jim Engandela	100	Adm
1	EME Audio & Video Systems	Jon Oster	45	Mgr
2	Horizon	Sandy Engandela	101	User

2 - Enter Password for

Password

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

3 - Login

Message

Your Master Prefs Wires are reset from "Itemized" to the "Combined" default.
Click Continue or Help for an explanation.
Contact Horizon if you wish to Itemize your Wire Supplements.

Help

Continue

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

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.

All Supplements	Delete All Wire	Restore Labor	Proposal - Wire Supplements				Phantom =	Adjust Bulk Wire - Home Runs	?	Home
Areas		Text		Products		Eileen Back		Wire Detail	5000 Sq Ft	Done
Labor		Parts		Wire		Itemized Entertainment System		Wire Summary	60 ft per Home Run	Wire Manager
Tasks						1293.1-1.100			Adjust Bulk Wire - Room Runs	
									100 % Update	
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	Tax Phz A B	Unit Sell
Balcony	1	Linn : 5101 Personal	Q	Bulk	Home	60 m	Linn : K10 Cable	<input type="checkbox"/>	T T	\$5.00
Balcony	1	Linn : 5101 Personal	Q	Bulk	Home	60 m	Linn : K10 Cable	<input type="checkbox"/>	T T	\$5.00
Balcony	1	Linn : 5101 Personal	Q	Bulk	Home	60 m	Linn : K10 Cable	<input type="checkbox"/>	T T	\$5.00
Balcony	1	Linn : 5101 Personal	Q	Bulk	Home	60 m	Linn : K10 Cable	<input type="checkbox"/>	T T	\$5.00
Balcony	1	Linn : 5101 Personal	Q	Bulk	Home	60 m	Linn : K10 Cable	<input type="checkbox"/>	T T	\$5.00
Balcony	1	Linn : 5101 Personal	Q	Bulk	Home	60 m	Linn : K10 Cable	<input type="checkbox"/>	T T	\$5.00
Balcony	1	Linn : 5101 Personal	Q	Bulk	Home	60 m	Linn : K10 Cable	<input type="checkbox"/>	T T	\$5.00
Balcony	1	Linn : 5101 Personal	Q	Bulk	Home	60 m	Linn : K10 Cable	<input type="checkbox"/>	T T	\$5.00
Balcony	1	Linn : 5101 Personal	Q	Bulk	Home	60 m	Linn : K10 Cable	<input type="checkbox"/>	T T	\$5.00
Balcony	1	Linn : 5101 Personal	Q	Bulk	Home	60 m	Linn : K10 Cable	<input type="checkbox"/>	T T	\$5.00
Balcony	1	Linn : 5101 Personal	Q	Bulk	Home	60 ft	Monster : 16/2 Spkr Wire	<input type="checkbox"/>	T T	\$0.45
										\$27.00

All Supplements				Proposal - Labor Supplements				Phantom Supplement =		Print		?		Home							
Areas		Text		Products		Eileen Back								Degree of Difficulty		Done					
Labor		Parts		Wire		Tasks		Itemized Entertainment System 1293.1-1.100								1 - Prewire 0%		Labor Summary			
																2 - Trim 0%					
																3 - Final 0%					
All Areas								Labor Supplements								Labor Total: 107:30:00		\$7,800.00			
Labor assigned to								View Labor Type		Labor		Install		Tax		Hourly		Total Time		Ext Sell	
Zone - Area		Qty		Make : Model		Edit <input type="checkbox"/> Sort		Note		Phases		A B		Rate		(h:m:s)					
Balcony		10		Linn : 5101 Personal Handset				Installation		<input type="checkbox"/>		1		<input type="text"/> <input type="text"/>		\$60.00		10:00:00		\$600.00 <input type="checkbox"/>	
Balcony		10		Linn : 5101 Personal Handset				Programming		<input type="checkbox"/>		2		<input type="text"/> <input type="text"/>		\$80.00		20:00:00		\$1,600.00 <input type="checkbox"/>	
Balcony		10		Linn : 5101 Personal Handset				Training		<input type="checkbox"/>		3		<input type="text"/> <input type="text"/>		\$100.00		30:00:00		\$3,000.00 <input type="checkbox"/>	
Balcony		10		Linn : 5101 Personal Handset				Parts Labor		<input type="checkbox"/>		1,2,3		<input type="text"/> <input type="text"/>		\$50.00		25:00:00		\$1,250.00 <input type="checkbox"/>	
Balcony		10		Linn : 5101 Personal Handset				Wire Labor - Bulk		<input type="checkbox"/>		1		<input type="text"/> <input type="text"/>		\$60.00		20:00:00		\$1,200.00 <input type="checkbox"/>	
Balcony		10		Linn : 5101 Personal Handset				Wire Labor - Precut		<input type="checkbox"/>		2,3		<input type="text"/> <input type="text"/>		\$60.00		2:30:00		\$150.00 <input type="checkbox"/>	

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.

Proposal - Product Detail - Wire Supplements
1 of 1

Areas	Text	Products
Labor	Parts	Wire

Eileen Back
1293.1-1.100
Linn : 5101 Personal Handset
Audio : Multi-room : Keypad

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

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

Balcony

Wire Make Model Add

Wire & Cable
for Product
Qty 10 ea

Wire & Cable are Itemized
 5000 Sq Ft Building Size

Only products classified as "Wire" can be added

Labor Time No DOD

Class	Bulk Run	Type	Total Wire Qty	Unit	Wire Make	Model/Description	Install Phase	No Labor	Unit	Ext h:m:s	Unit Cost	Unit Sell	Ext Sell
Bulk	Home		60 M	Linn	K10 Cable	1	<input type="checkbox"/>	0:00:30	0:30:00	3.00	5.00	300.00	<input type="checkbox"/>
Bulk	Home		60 M	Linn	K10 Cable	1	<input checked="" type="checkbox"/>	0:00:00	0:00:00	3.00	5.00	300.00	<input checked="" type="checkbox"/>
Bulk	Home		60 M	Linn	K10 Cable	1	<input type="checkbox"/>	0:00:30	0:30:00	3.00	5.00	300.00	<input type="checkbox"/>
Bulk	Home		60 M	Linn	K10 Cable	1	<input checked="" type="checkbox"/>	0:00:00	0:00:00	3.00	5.00	300.00	<input checked="" type="checkbox"/>
Bulk	Home		60 M	Linn	K10 Cable	1	<input type="checkbox"/>	0:00:30	0:30:00	3.00	5.00	300.00	<input type="checkbox"/>
Bulk	Home		60 M	Linn	K10 Cable	1	<input type="checkbox"/>	0:00:30	0:30:00	3.00	5.00	300.00	<input type="checkbox"/>

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.

Proposal - Project Details

Eileen Back

Itemized Entertainment System
1293.1-1.100

Client **Project**

Info **Contacts** **Com Log**

Proposal-Project Title
 Itemized Entertainment System

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

Hourly Labor Rates

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

Proposal Due Date
 Proposal Due 12/23/2013

Install Phase Dates

Start Dates
 1 - Prewire
 2 - Trim
 3 - Final

Completion Date
 Target Completion Date

Labor Degree of Difficulty

Building Type

Number of Floors

Project Difficulty %

1 - Prewire 7% 2 - Trim 7% 3 - Final 7%

Degree of Difficulty is changed by Building Type, Floors and Client Difficulty and is applied to Labor Time.

Installation Notes

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.

Proposal - Product Detail 2 of 7 Home

Hayes Callahan
1283.1-1.100
Linn : Katan
Audio : Speaker : Bookshelf

Areas Text Products
Labor Parts Wire Tasks

Product Specs Pix - PDF's Labor Parts Wire Tasks **1 - Home Theater**

Qty
 Make Sell Price
 Model \$995.00 pr
 SKU
 Finish
 Description Bookshelf loudspeakers: pair
 Features The Katan loudspeaker is an attractive compact, two-way bass reflex loudspeaker designed for multi-channel applications.
 Cue Notes

Group
 Change Group Original Group
 Product Classification
 Primary Install Phase
 Tax A + Tax B
 Do not Discount ☐ Product Sort
 Exclude \$ from Totals ☐ Discontinued Item ☐
 Show Product as Option ☐ Issue Staple Up Card ☐
 Do not Purchase or Install ☐ ?
 Purchasing
 Purchasing Lead Days
 Default Vendor
 Alternate PO Vendor ? Alt PO Cost
 Use Alt ☐

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.

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

Final Change Order 1284.1c1-1.100	EME audio & video Home Entertainment System Change Order for John & Mary Smith	Date 8/2/2013
--------------------------------------	--	------------------

	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		\$895.90
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: 715-287-4484 horizon@trivest.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.

Setup	Email Vendor	Delete PO	Project - Purchase Order Detail		9/19/2013 Post PO	Prev/Next	?
<input type="checkbox"/> Do not show Client/Project info on PO			Vendor Address <input checked="" type="checkbox"/>		Ship To Address <input checked="" type="checkbox"/>		Hide Prices <input type="checkbox"/>
PO Number 1092 - 1285.1-1.100 User PO # _____ PO Date 9/19/2013			Linn Products 8787 Perimeter Park Blvd. Jacksonville, FL 32216 USA		EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 567937		Done Preview Print & Post
Buyer: Joe Buyer Buyer Override: _____ Shipping Method: Best Way PO Terms: _____ PO Notes: _____			1285.1-1.100 Mike & Jessica Potter		Receiving <input checked="" type="checkbox"/> Auto Receive <input checked="" type="checkbox"/> All PO Items Date Received: _____ Received By: _____		
			PO Total \$2,985.00				
Order Qty	Make	Model	Finish	Unit	Raw Cost	Ext	
Buy Qty	Description						
5 pr	Linn	Katan	Black		\$597.00	\$2,985.00	
5 pr	Bookshelf loudspeakers: pair			note:			
				Receive	Qty	Qty	Qty
				View-Edit	Rec'd	Open	Delvd
				Receive	3	2 pr	
				Rcv'd: 9/19/2013			2

Purchase Orders - All - 7 Products									
Mike & Jessica Potter									
1285.1-1.100									
Products 6 To Order 2 Back Order 2									
Global Buy Pkg Off									
Orphan									
Create PO Leave									
Auto Set View P.O.'s									
Enter PO Qty Sum Mode - PO Status									
Qty Ordered Recvd to date Delvrd									
Zone - Area CO# Qty Sold Make : Model Updated - Master Cost Finish Alt-x Vendor ? Qty Staged To Order Qty									
3 1 ea Linn : 5101 Personal Handset 8/8/2011 \$234.00 \$234.00 Black Linn Products 0 1									
3 1 ea Linn : 5125 8/8/2011 \$1,850.00 \$1,850.00 Silver Linn Products 3 1									
3 5 pr Linn : Katan 8/8/2011 \$597.00 \$597.00 Black Linn Products 35 0 5 3 2									

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

POS - Purchase Order									
OPEN PO #7193 1 of 58									
Vendor: BTX 5 Skyline Drive Hawthorne, NY 10532 United States Work: 1-800-666-0996 Fax: 1-800-569-4244									
Ship To: Shop Warehouse: EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 567937 Ph: 715-287-3335 Ext: Fax: 715-287-4464 email: horizon@trivest.net 9/29/2005 Open Need By									
Buyer Reference Reference 2 Ship VIA FOB Terms Receive All									
Tina McKnight									
Pick Qty unit Product Description (max 2 lines) Unit Cost Ext Cost Qty Rcvd Qty Open Qty Delvd									
1 ea Male D-SUB 9 pin screw terminal connector 15.95 15.95 1 0 1									
1 ea Female D-SUB 9 pin screw terminal connector 15.95 15.95 1 1 1									

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).

Project - Purchase Order List									
John & Mary Smith									
Home Entertainment System 1284.1-1.100									
Print & Post All PO's Post All PO's									
Done									
PO #	PO Date	Vendor	PO Total	Project	Client	Posting Date	Print	Post	View
1075	9/12/2006	Linn Products	\$8,712.00	1284.1-1.100	John & Mary Smith	8/15/2013			
1076	9/12/2006	Runco International	\$4,797.00	1284.1-1.100	John & Mary Smith	8/15/2013			
1090	2/10/2012	Klipsch Audio Technologies	\$473.00	1284.1-1.100	John & Mary Smith	8/15/2013			

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.

Project - Purchase Order List									
John & Mary Smith									
Home Entertainment System 1284.1-1.100									
Print & Post All PO's									
Done									
Global PO Module									
PO #	PO Date	Vendor	PO Total	Project	Client	Posting Date	Print	Post	View
1075	9/12/2006	Linn Products	\$8,712.00	1284.1-1.100	John & Mary Smith	9/12/2006			
1076	9/12/2006	Runco International	\$4,797.00	1284.1-1.100	John & Mary Smith	9/12/2006			
1090	2/10/2012	Klipsch Audio Technologies	\$473.00	1284.1-1.100	John & Mary Smith	2/10/2012			

Find PO's		Global Project - Purchase Orders					Global PO Help ?		Home			
Show All PO's		1. First Make your PO's from within each Project 2. Pick the underlined Vendor to Group PO's by Vendor 3. UnStage (uncheck) unwanted PO's 4. Click on Create Global PO to create a new Group PO 5. Choose a Combined Line Item or Separate Line Item PO							Done			
Set/Clear Staging									PO's	WO's	Sfs	Create Global PO
Global PO												
View	Project	SCPS PO	User PO #	QB PO #	Posted Date	Pick Vendor	Staging	Created	Number	Date	Reprint	
	1298.1-1.100	1104			9/5/2013	<u>Capitol Sales Company</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Tom Burke - Sunbelt Business Brokers											
	1284.1-1.100	1075			8/15/2013	<u>Linn Products</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	John & Mary Smith											
	1284.1-1.100	1076			8/15/2013	<u>Runco International</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	John & Mary Smith											
	1284.1-1.100	1090			8/15/2013	<u>Klipsch Audio Technologies</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	John & Mary Smith											
	1273.1-1.100	1086			8/9/2011	<u>Crestron Electronics, Inc</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Dr. Hawn - Chippewa Valley Eye Clinic											
	1273.1-1.100	1087			8/9/2011	<u>Klipsch Audio Technologies</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Dr. Hawn - Chippewa Valley Eye Clinic											
	1273.1-1.100	1088			8/9/2011	<u>Runco International</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Dr. Hawn - Chippewa Valley Eye Clinic											
	1273.1-1.100	1089			8/9/2011	<u>Sonance</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Dr. Hawn - Chippewa Valley Eye Clinic											
	1286.1-1.100	1078			9/13/2006	<u>Linn Products</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Gary Hagen											
	1268.1-1.100	1073			9/12/2006	<u>Linn Products</u>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1073	8/15/13		<input type="checkbox"/>
	Dana Berkow											
	1268.1-1.100	1074			9/12/2006	<u>Runco International</u>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1073	8/15/13		<input type="checkbox"/>
	Dana Berkow											

Clear Fields	Find PO - Utility		Done Find
Enter find criteria and click the Done/Find button			Cancel
<div> <div>Posted Date Range</div> <div>creation date from proposal list</div> <div>Today 9/11/2013</div> <div> <div>Start Date</div> <div>to</div> <div>End Date</div> </div> </div>			
<div> <div>Vendor</div> <div></div> </div>			
<div> <div>Project Number</div> <div></div> </div>			
<div> <div>PO Number</div> <div></div> </div>			
<div> <div>Exclude Created PO's</div> <div><input type="checkbox"/></div> </div>			

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.

Printer Setup Master Project - Work Order - Area Text

John & Mary Smith Done

Home Entertainment System
1284.1-1.100

Pick	1 - Pick Area	Print Area	2 - Pick Text Category	3 - Pick () Text
	Zone 1 - Home Theater		Audio	
	Zone 2 - Living Room		Commercial Sound	
	Zone 3 - Office		Control	
	Zone 4 - Dining Room		Installations	
	Zone 4 - Kitchen		Jacks	
	Zone 5 - Master Bedroom		Racks	
	Zone 5 - Master Bathroom		Rooms	
			Security	
			Systems	
			Vacuum	
			Video	

Products in: Zone 4 - Kitchen

Proposal Text for: Zone 4 - Kitchen

Add to Library

Linn : Diskreet-Rd

This area includes the following products and features.

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.

Sonance
VP46R SST/SUR

SonanceVP46RSSTSUUR

*Validation = MakeModelFinish and should not exceed 25 characters.
Trim All, Make Left 8, Model Left 10 + Right 2, Finish Left 4*

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.

Product Library - Temporary Override Options

Both of these Options are Temporary and will be reset (removed) when any user logs into SCPS.

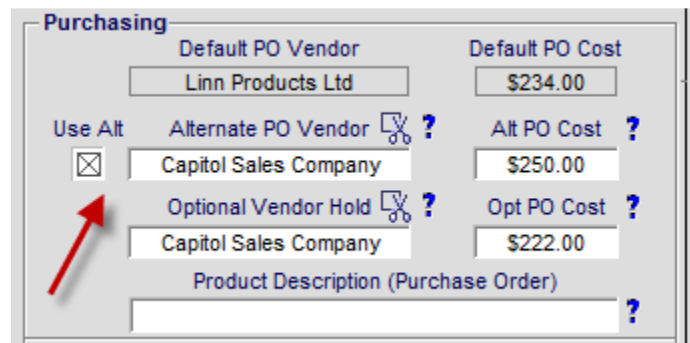
Validation Override ☒ Normally changing the case of the Make or Model of a Product in the Product Library will trigger the Validation Error message, because SCPS thinks the Product already exists. This option will override this message.

Deletion Override ☒ Normally if a Product exists in a Proposal, Project, Change Order or Completed Project, you are not allowed to Delete it from the Product Library, so that it's History and Inventory Count can be maintained.

This Delete Override Option enables you to Delete these Products and the Proposals. Project. Change Orders and Completed Project will not be affected, but you will lose the Inventory Count on the Deleted Item.

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.

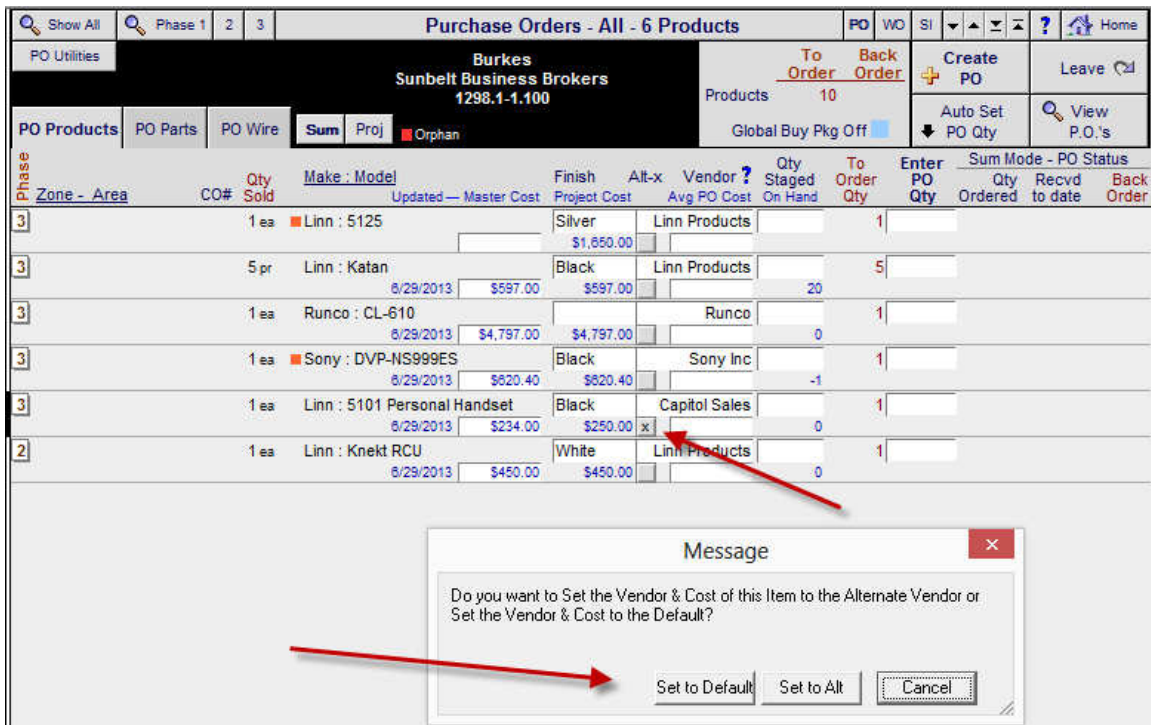


Purchasing

Default PO Vendor		Default PO Cost	
Linn Products Ltd		\$234.00	
Use Alt	Alternate PO Vendor	Alt PO Cost	
<input checked="" type="checkbox"/>	Capitol Sales Company	\$250.00	
	Optional Vendor Hold	Opt PO Cost	
	Capitol Sales Company	\$222.00	
Product Description (Purchase Order)			

A red arrow points to the 'Use Alt' checkbox.

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.



Purchase Orders - All - 6 Products

Phase	Zone - Area	CO#	Qty Sold	Make : Model	Updated - Master Cost	Finish	Alt-x	Vendor ?	Avg PO Cost	Qty Staged On Hand	To Order Qty	Enter PO Qty	Sum Mode - PO Status
3			1 ea	Linn : 5125		Silver		Linn Products			1		
3			5 pr	Linn : Katan	8/29/2013 \$597.00	Black		Linn Products		20	5		
3			1 ea	Runco : CL-610	8/29/2013 \$4,797.00			Runco		0	1		
3			1 ea	Sony : DVP-NS999ES	8/29/2013 \$620.40	Black		Sony Inc		-1	1		
3			1 ea	Linn : 5101 Personal Handset	8/29/2013 \$234.00	Black		Capitol Sales		0	1		
2			1 ea	Linn : Knekt RCU	8/29/2013 \$450.00	White		Linn Products		0	1		

A red arrow points to the 'Alt-x' button next to the 'Capitol Sales' vendor for the 'Linn : 5101 Personal Handset'.

Message

Do you want to Set the Vendor & Cost of this Item to the Alternate Vendor or Set the Vendor & Cost to the Default?

Set to Default Set to Alt Cancel

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.

The screenshot shows the 'Project - Purchase Order Detail' screen. At the top, there are tabs for 'Setup', 'Email Vendor', and 'Delete PO'. The main title is 'Project - Purchase Order Detail' with a status of 'Not Posted'. Below this, there are sections for 'Vendor Address' (Capitol Sales Company) and 'Ship To Address' (EME Audio & Video Systems). A 'PO Number' field shows '1104 - 1298.1-1.100'. A 'Show' dropdown menu is set to 'PO Number'. A 'PO Date' field shows '9/5/2013'. A 'Buyer' field shows 'Joe Buyer'. A 'Shipping Method' field shows 'Best Way'. A 'PO Terms' field is empty. A 'PO Notes' field is empty. A 'PO Total' field shows '\$250.00'. A 'Cost Override' field shows '\$250.00'. A 'Manual Cost Override' dialog box is open, showing 'Enter Cost Override Amount' with a text input field containing '250' and an 'OK' button. A red arrow points to the 'Cost Override' field, and another red arrow points to the 'Manual Cost Override' dialog box.

Order Qty	Buy Qty	Make	Description	Model	Finish	Unit	Raw Cost	Ext. Raw Cost	Qty	Open
1	ea	Linn	5101 Personal Handset		Black		\$250.00	\$250.00	1	ea
1	ea		Universal learning remote							

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.

The screenshot shows the 'POS - Find Quotation' screen. At the top, there is a header bar with the title 'POS - Find Quotation'. Below this, there is a text input field with the placeholder text 'Enter all of your desired Find criteria and then click Done'. A 'Done' button is located to the right of the input field. Below the input field, there are several labels: 'Invoice', 'Client', 'Company', 'Date', 'Specialst', and 'Invoice Amount'. A red arrow points to the 'Client' label. To the right of the labels, there is a list of invoice numbers: QT #6035, QT #6048, QT #6049, QT #6082, QT #6084, QT #6127, QT #6200, QT #6230, QT #6262, QT #6276, QT #6290, QT #6296, QT #6328, QT #6335, QT #6347, and QT #6369. The list is displayed in a scrollable area.

Enhancement – Master Preferences/Groups: Improve Group screen GUI

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

Groups	Labor	Parts	Wire	Tasks	Master Prefs - Product Groups			Utility	Print	?	Home
Group Graphics	Create Product Groups (with Classifications & Phases) to organize your Products										Done
Group Sort Order	Assign Supplements (Labor, Parts, Wire and Tasks) to Product Groups										
Assign Product Groups to each product in your Product Library											

Product Groups							Products Assigned to Group
Sort	Discipline	Category	Type	Product Classification	Primary Install Phase		Delete
a	Audio	Amplifier	Integrated Amplifier	Product	3 Final	Y	
a	Audio	Amplifier	Multi-channel	Product	3 Final	Y	
a	Audio	Amplifier	Preamplifier	Product	3 Final	Y	
a	Audio	Amplifier	Single Channel	Product	3 Final	Y	
a	Audio	Amplifier	Small Amp	Product	3 Final	N	
a	Audio	Amplifier	Stereo	Product	3 Final	Y	
a	Audio	Amplifier	Stereo Receiver	Product	3 Final	Y	
a	Audio	Amplifier	Surround Processor	Product	3 Final	Y	
a	Audio	Amplifier	Surround Receiver	Product	3 Final	Y	
a	Audio	Control	Multi-channel	Product	3 Final	Y	
a	Audio	Misc	Final Part	Part	3 Final	Y	
a	Audio	Misc	Prewire Part	Part	1 Prewire	N	
a	Audio	Misc	Trim Part	Part	2 Trim	Y	
a	Audio	Multi-room	Amplifier	Product	2 Trim	N	
a	Audio	Multi-room	Controller	Product	2 Trim	Y	
a	Audio	Multi-room	Keypad	Product	2 Trim	Y	
a	Audio	Multi-room	Panel/enclosure	Product	2 Trim	N	
a	Audio	Multi-room	Preamplifier	Product	2 Trim	Y	
a	Audio	Multi-room	Receiver	Product	2 Trim	Y	
a	Audio	Multi-room	Switcher	Product	2 Trim	Y	
a	Audio	Multi-room	Volume Control	Product	2 Trim	Y	
a	Audio	Source	Cassette Deck	Product	3 Final	N	
a	Audio	Source	CD Changer	Product	3 Final	N	
a	Audio	Source	CD Player	Product	3 Final	Y	
a	Audio	Source	Hard Drive Music Storage	Product	3 Final	Y	
a	Audio	Source	Phono	Product	3 Final	Y	
a	Audio	Source	Tuner	Product	3 Final	Y	
a	Audio	Source	Universal Player	Product	3 Final	Y	
a	Audio	Speaker	5.1 System	Product	3 Final	Y	
a	Audio	Speaker	Bookshelf	Product	3 Final	Y	
a	Audio	Speaker	Center Channel	Product	3 Final	Y	
a	Audio	Speaker	Floor	Product	3 Final	Y	
a	Audio	Speaker	In-wall	Product	2 Trim	Y	
a	Audio	Speaker	Landscape	Product	3 Final	Y	
a	Audio	Speaker	On-wall	Product	3 Final	Y	

Show All Disciplines

Group Navigator
Select a Discipline

Up
Down
First
Last

First Group 1
Prev Next

Go to Next After Last Selection
Go to Last Selection

View by Category

Tip ?
Deleting Groups
You cannot delete a Product Group if there are products in the Product Library that are assigned to that Product Group.

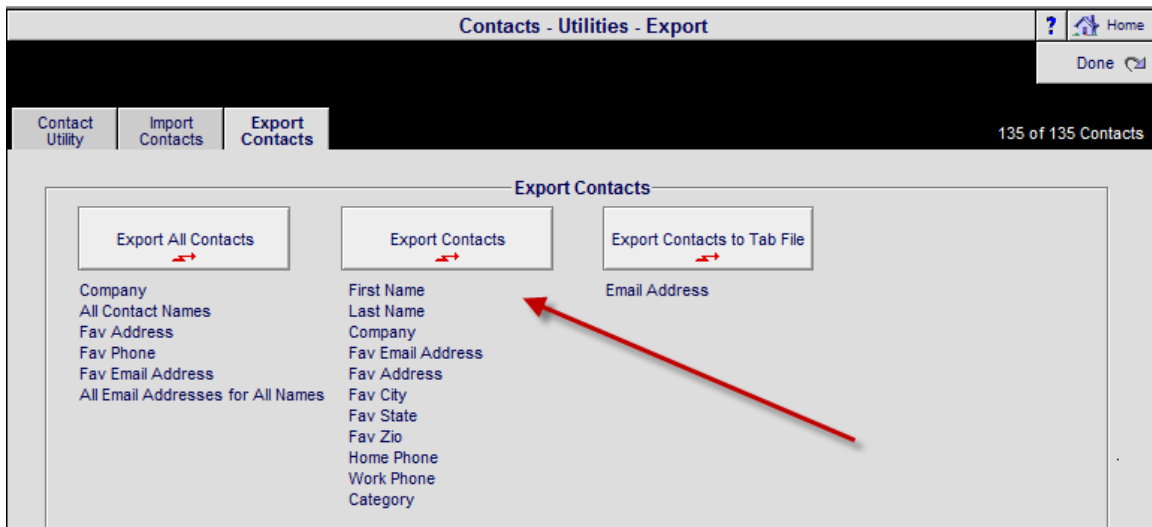
If there are, you will be notified of this and you will need to change those products to a different group, before you delete that group.

Just follow the on-screen steps to do this.

Page
Up Down Home End

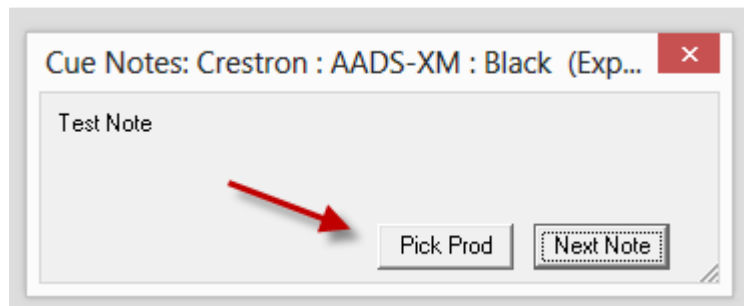
Enhancement – Contact/Utilities/Export Contacts: New Export Map

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.

Proposal - Tax Summary & Rates

Refresh Printer Setup ? Print

Greg Caves
Runco International
Home Entertainment System
1314.1-1.100

Done

Pricing	Labor Rates	Commissions																																						
Tax Summary	Product Tax	Fees Tax																																						
<div style="display: flex; justify-content: space-between;"> <div style="width: 15%;"> <i>Includes Both Bulk & Pre-Cut Wire & Cable</i> </div> <table border="1" style="width: 85%; border-collapse: collapse;"> <thead> <tr> <th>Tax Summary</th> <th>Sell</th> <th>Tax A</th> <th>Tax B</th> <th>Total Tax</th> </tr> </thead> <tbody> <tr> <td>Equipment</td> <td>\$390.00</td> <td>\$21.45</td> <td>\$0.00</td> <td>= \$21.45</td> </tr> <tr> <td>Installation</td> <td>\$638.00</td> <td>\$35.09</td> <td>\$0.00</td> <td>= \$35.09</td> </tr> <tr> <td>Misc. Parts</td> <td>\$1,385.00</td> <td>\$76.18</td> <td>\$0.00</td> <td>= \$76.18</td> </tr> <tr> <td>Wire & Cable</td> <td>\$849.00</td> <td>\$46.70</td> <td>\$0.00</td> <td>= \$46.70</td> </tr> <tr> <td>Additional Fees</td> <td>\$64.11</td> <td></td> <td></td> <td>=</td> </tr> <tr> <td>Total</td> <td>\$3,326.11</td> <td>\$179.41</td> <td>\$0.00</td> <td>= \$179.41</td> </tr> </tbody> </table> </div>						Tax Summary	Sell	Tax A	Tax B	Total Tax	Equipment	\$390.00	\$21.45	\$0.00	= \$21.45	Installation	\$638.00	\$35.09	\$0.00	= \$35.09	Misc. Parts	\$1,385.00	\$76.18	\$0.00	= \$76.18	Wire & Cable	\$849.00	\$46.70	\$0.00	= \$46.70	Additional Fees	\$64.11			=	Total	\$3,326.11	\$179.41	\$0.00	= \$179.41
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<p style="text-align: center;">Sales Tax - Print Options</p> <p>Show Sales Tax <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Contract Tax Totals Option <input type="text" value="AB Tax"/></p> <p>Include Sales Tax in the Grand Total <input type="radio"/> Yes <input type="radio"/> No</p> <p>Do not show tax separately <input type="radio"/> Yes <input type="radio"/> No <small>blank = no</small></p>																																								

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 Pro-

posal.

Default Labor Time		
1 - Prewire 0%	2 - Trim 0%	3 - Final 0%
h:m:s		
Parts Time - per each	<input type="text" value="0:00:25"/>	Reset after changing Install Time Reset Parts
Bulk Wire Time - per foot	<input type="text" value="0:00:30"/>	Reset Bulk Wire
Pre Cut Wire Time - per pair	<input type="text" value="0:05:00"/>	Reset Pre Cut Wire

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.

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

PDF reDirect Pro v2,winspool,Ne01:

Burkes
Sunbelt Business Brokers
Home Theater System
1298.1-1.100

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

Proposal Summaries
Print All

Proposal Summary
Discipline
Area
Phase

Master Proposal & Supplements
Products, Parts, Wire & Labor
Discipline
Area
Products & Only Labor
Products & Supplements without Prices
Area by Phase
Phase

Home Theater System
for Burkes Sunbelt Business Brokers



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.

1298 Proposal Utility - Administration ?

Burkes
Sunbelt Business Brokers
Home Theater System
1298.1-1.100

Done

Restore Wire Labor
Caution: This Utility will Reset all of the Wire - Labor Time and Amounts (in this Proposal) to Version 10.3v1 standards. This may change the Proposal Totals that you have given to your Client. Click cancel if you do not want to do this.

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.

Product Library - Override Deleting Products in Entities

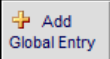







Deletion Override ☒ Normally if a Product exists in a Proposal, Project, Change Order or Completed Project,, you are not allowed to Delete it from the Product Library, so that it's History and Inventory Count can be maintained.

This Delete Override Option enables you to Delete these Products and the Proposals. Project. Change Orders and Completed Project will not be affected.

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.

Setup Delete WO		Work Order Detail				6/5/2013	Post PO	Prev/Next	?		
WO Number 2010 - 1285.1-1.100 WO Date 6/5/2013		Mike & Jessica Potter Home Theater System 1285.1-1.100 WO Notes				Show Area Text <input type="checkbox"/> Hide Labor Time <input type="checkbox"/>					
Work Order Projected Time WO Total Time 1:40 Additional Time <input type="text"/> WO Time Total 1:40 Requested Installer <input type="text"/>						Create Continuation WO Pick List Done					
Master Tracker Appointment Add Appt Edit Appt Appointment:						Auto Set Installed Qty Install Tasks Preview Print & Post					
						Add Global Time Install Log Select Time Total					
		Global Total 15:00:00 +		Total Left to Install 4 Item Total 1:30:00 =		Total Time 16:30:00 <input type="button" value="All"/>					
ID	Zone - Area	Install Location	Qty	Make	Model Description	Serial Numbers	Item Entry	Qty Installed	Left To Install	Install Time	Edit Log
Phz	Class										
1	Zone 1 - Home Theater		5 pr	Linn	Katan			1	4	1:30:00	
3	Product				Bookshelf loudspeakers: pair						

Work Order - 2010 - 1285.1-1.100 - Global Install Log						
		Mike & Jessica Potter			Done 	
		Home Theater System				
		1285.1-1.100				
Total Time		15:00:00				
Install Date	Global Time (h:m:s)	Installer	Installation Notes		Delete	
6/5/2013 	2:30:00	LB				
Start Time	End Time	Total Time	Post Time			
10am	12:30pm	= 2:30:00	<input checked="" type="checkbox"/>			
6/5/2013 	12:30:00	LB				
Start Time	End Time	Total Time	Post Time			
8am	8:30pm	= 12:30:00	<input checked="" type="checkbox"/>			
6/5/2013 						
Start Time	End Time	Total Time	Post Time			
		=	<input checked="" type="checkbox"/>			

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	John & Mary Smith			Labor Time Remaining on Project			Totals		Left To Install	Left to Complete	Create WO		Leave					
Wire Manager	1284.1-1.100			Project Time 74:40:00			Products 2		2	35	+							
				Installed Time 0:00:00			Parts 0		0	17	Auto Set		View Work Orders					
				Labor Time Left 74:40:00			Wire 0		0	2,735	Qty to Issue							
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 loudspeakers: 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	Active 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			

Master Project - Work Order - Area Text		
John & Mary Smith		
Home Entertainment System 1284.1-1.100		
Pick	1 - Pick Area	2 - Pick Text Category
	Zone 1 - Home Theater	Audio
	Zone 2 - Living Room	Commercial Sound
	Zone 3 - Office	Control
	Zone 4 - Dining Room	Installations
	Zone 4 - Kitchen	Jacks
	Zone 5 - Master Bedroom	Racks
	Zone 5 - Master Bathroom	Rooms
		Security
		Systems
		Vacuum
		Video
Products in: Zone 2 - Living Room		<div> </div> Proposal Text for: Zone 2 - Living Room <div>Add to Library</div> <p>Home music systems require careful design and installation to achieve their maximum hi-fidelity potential. music is the communication of emotion. a great stereo must sound pleasant and be emotionally involving. to achieve this care must be taken in matching and tuning each component so that the whole system will perform in harmony with the music. frequency response, sound pressure levels, imagery, tonal balance and distortion are a few of the parameters that are taken into consideration and adjusted for maximum performance.</p> <p>The equipment rack will contain all of the electronic equipment necessary to operate the system. a locking door will secure the rack. all electronic equipment will be protected from ac spikes by automatic ac surge protector.</p>
		<div> </div> Work Order Text for: Zone 2 - Living Room

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

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

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

Home Theater System
1285.1-1.100

Proposals **Projects** Costing Custom

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

- Purchase Order Products

Install Staging Reports

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

☐ Hide Staging Report Pricing

Staging by Make-Model (Total Qty)

- Product Staging
- Part Staging
- Wire Staging

Staging by Zone-Area (Total Qty)

- Product Staging
- Part Staging
- Wire Staging

Staging by Discipline (Total Qty)

- Product Staging
- Part Staging
- Wire Staging

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
- Wire Sum List
Qty Sum of Project Items and CO's

Project - PO Utilities ? Home

John & Mary Smith Done

Home Entertainment System
1284.1-1.100

Print Staging Reports

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

☐ Hide Staging Report Pricing

Staging by Make-Model (Total Qty)

- Product Staging
- Part Staging
- Wire Staging

Staging by Zone-Area (Total Qty)

- Product Staging
- Part Staging
- Wire Staging

Staging by Discipline (Total Qty)

- Product Staging
- Part Staging
- Wire Staging

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

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

EME
audio & video

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

POS - Find Invoice

?

Home

Enter all of your desired Find criteria and then click Done

Invoice

Client

Company

Date

Specialist

Invoice Amount

Amount Due

P.O. Status

P.O. Buyer

Quote & Sales Invoice Reference

PO Reference


Reference

PO Reference 2

Reference 2

Done

Show All Including Done Invoices



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.

Product Library Utility - Find & Change								449 of 449 ?
Done								
Clean Delete	Reset Update	Find Change	General Import	User Import	RCMS Import	Distributor Import	Export Products	
Find Duplicate Products Use this utility will find all products that have the same Make and Model number. <div style="float: right;"> Find Duplicates Find Models with () </div>			Change Groups on Multiple Products This utility enables you to find multiple Products and Assign a Product Group to all of them at one time. <div style="float: right;"> Change Groups on Multiple Products </div>					
Find Products with Orphaned Groups Use this utility will find all products that do not have a group in Master Prefs. Please reassign them to Valid Groups. <div style="float: right;"> Find Orphaned Groups </div>			Change Make Names This utility enables you to Change the Make Names on Products in the Product Library. <div style="float: right;"> Change Make Names </div>					
Find Products with Pictures and Pdf's This utility will find all products that Pictures assigned to them. This utility will find all products that have Embedded vs Linked Pix. This utility will find all products that have PDF's attached to them. <div style="float: right;"> Find All Products with Pix Find Embedded vs Linked Pix Find All Products with PDF's </div>			Change Product Text Case Convert the Make, Description, Warranty, Group, Class and Install Notes to normal case. Model will stay in Caps. <div style="float: right;"> Change to Normal Case </div> Convert the Make, Description, Warranty, Group, Class and Install Notes to CAPS. Features will stay as entered. <div style="float: right;"> Change to CAPS </div> Convert only Descriptions to CAPS. <div style="float: right;"> Change to CAPS </div> Convert all Make names with 3 characters or less to all CAPITAL letters. <div style="float: right;"> Change Make to ALL CAPS </div>					
Find All Products in Entities Use this utility will find all products that have been used in Proposals and Projects. <div style="float: right;"> Find all Products in Entities </div>			Change - Pix & PDF from Embedded to Linked This Utility will take you to a screen where you will be able to change your Product Pix from embedded to linked references. <div style="float: right;"> Change to Linked </div>					

Replace Data		Product Library - Specifications		1 of 27 ?	Home
Entities using this Product	Find all Products in Entities	AV IQ Product Info Website	AAAA 1234 Equipment : :		Done
Product is in a Proposal/Project			Prev Next		
Product	Specs	Pix	PDF	Labor	Parts
Data Product ID: 10938 Product Created By: Jim Engandela Sell Price Updated By: Cost Price Updated By:			Warranty Factory Warranty Extended Warranty		

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.

Find Products Replace Data Product Library - Product Detail 3 of 444 ? Home

Duplicate Product
 Delete Product

Created: 4/6/2006
 Sell Updated: 8/8/2011
 Cost Updated: 8/8/2011
 Product is in a Proposal/Project

Crestron
AADS-XM
 Adagio Audio Distribution System w/ XM Sat Radio
 Audio : Multi-room : Switcher

Done
 Prev Next

Product Specs Pix PDF Labor Parts Wire Tasks

Make: **Crestron**
 Model: **AADS-XM**
 SKU:
 Finish: **Black**

Sell Price: **\$2,900.00 ea**

Group: **Audio : Multi-room : Switcher**
 Class: **Product**
 Phase: **2 Trim**

Status:
 Favorite: ☐ Tax A: **T** Phantom Product: ☐ ?
 Fee SKU: ☐ Tax B: **T** Proposal Sort Order: **m**

Options:
 New Item: ☐ Do not Hide: ☐ ?
 Hide this item: ☐ Do not Delete: ☐
 Discontinued item: ☐ Do not Discount: ☐
 Display Installed Price: ☐ Issue Staple Up Card: ☐ ?

Inventory:
 Qty: Cost Value:
 Quantity On-Hand:
 Optimum Qty:
 Order Qty: **0**
 Delivery Lead Time: **7** Days

Description: **Adagio Audio Distribution System w/ XM Sat Radio**
 Features:
 Sources 1-4: (16) RCA female, Tuner Out-AM/FM: (2) RCA female, Tuner Out-XM: (2) RCA female, Net 1-6: (6) 4-pin 3.5mm detachable terminal blocks, IR Out 1-4: (4) 3.5mm TRS mini-phone jack, IR/Serial port, COM A: (1) DB9 male, bidirectional RS-232 port, Computer: (1) 6-pin RJ11 female, bidirectional RS-232 computer console port, LAN: (1) 8-wire RJ45 w/ 2 LED indicators, Net: (2) 4-pin 3.5mm detachable terminal blocks, Rooms 1-6: (12) 2-pin 7.62mm detachable terminal blocks, power amplifier outputs; XM Ant: (1) SMB, FM Ant: (1) F-type coaxial, AM Ant: (1) 2-pin spring-loaded terminals

Cue Notes:

Unit: **ea** Net Price: Loading Calculator: Update:
 List: Adjustment Type: %
 Sell: **\$2,900.00**
 Minimum Sell: GP: % \$
 Net Cost: **\$1,450.00**
 Loaded Price:
 Sell: **\$2,900.00**
 Cost: **\$1,450.00**
 GP%: **50.0%**

Product & Supplements

Product	Parts	Wire	Installed Price	Total
Sell			Sell	\$2,900.00
Labor			Labor	\$45.00
Total			Total	\$2,945.00

 View Product, Parts, Wire & Labor Costs

Purchasing:
 Product Description (Purchase Order):
 Alternate PO Vendor: ?
 Optional Product Cost: ? Optional Vendor: ?
 Buy Package Option: ? Enable: ☐ Global Buy Pkg Off: ☐
 Buy Pkg: Buy Pkg Cost:
 Buy Pkg Qty: ea Set Cost:

Work Orders:
 Alternate Product Listing (Work Order & Wire Mgr):
 Product Installation Notes (Work Order):

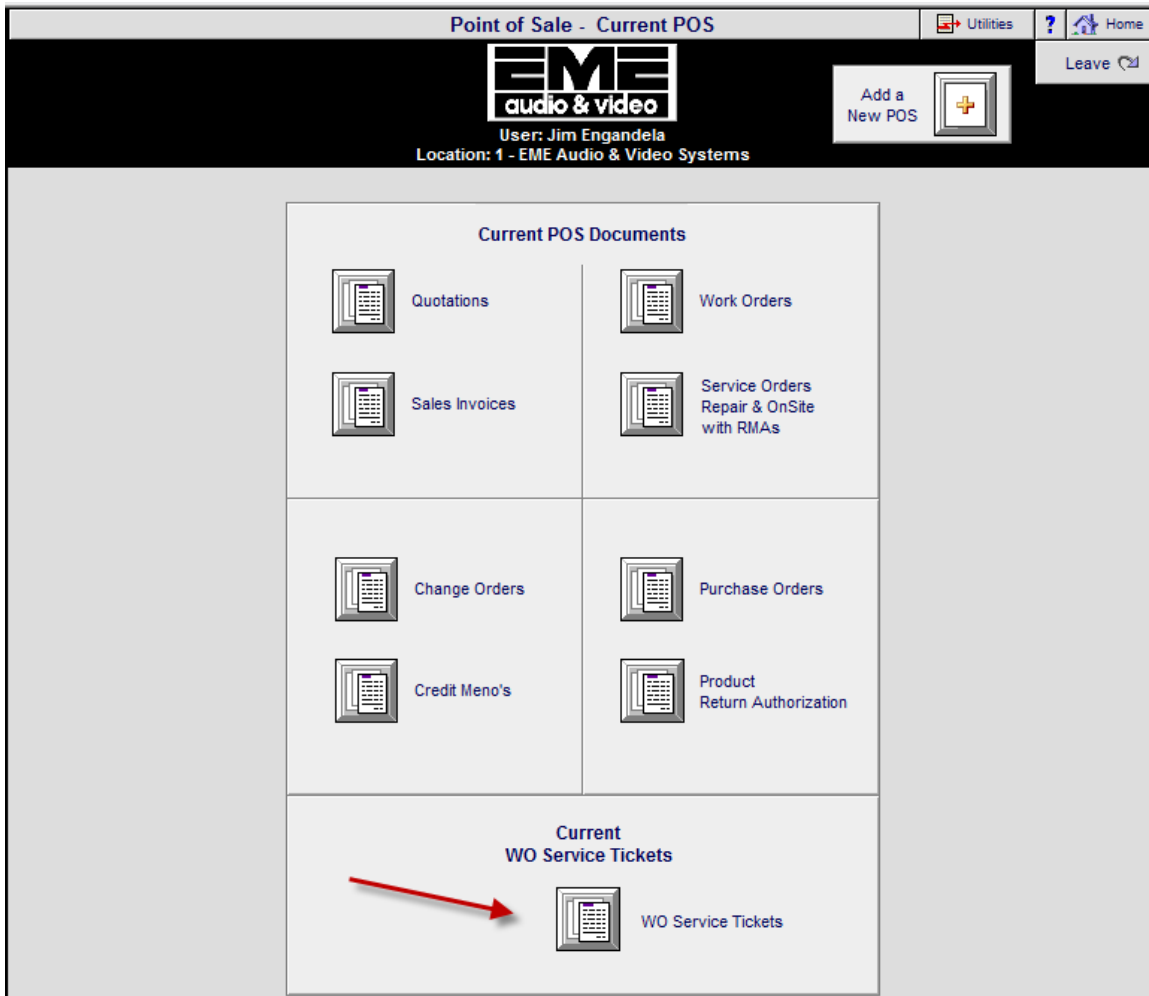
Crestron
 AADS-XM
 Adagio Audio Distribution System w/ XM Sat Radio
 Black
 CrestronAADSXMBla
 Validation = MakeModelFinish and should not exceed 25 characters.

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.

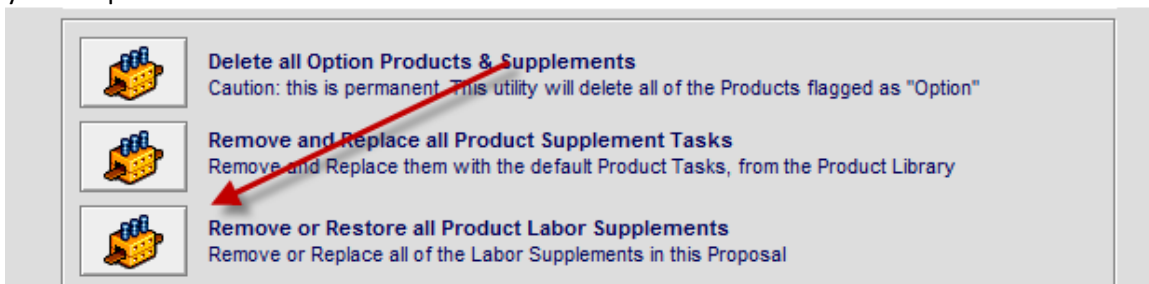
Delete WO		Work Order Detail				Printer Setup		Prev/Next		?		
Pick List						Install Tasks		Done				
WO Number 2010 - 1285.1-1.100 WO Date 6/5/2013		Mike & Jessica Potter Home Theater System 1285.1-1.100				6/5/2013 Post PO <input checked="" type="checkbox"/>						
Work Order Projected Time WO Total Time 13:45 Additional Time <input type="text"/> WO Time Total 13:45 Requested Installer <input type="text"/>		<input type="button" value="New"/> <input type="button" value="WO Service Tickets"/> <input type="button" value="View"/>				<input type="button" value="Create Continuation WO"/> <input type="button" value="Auto Set Installed Qty"/>		<input type="checkbox"/> Show Area Text <input type="checkbox"/> Hide Labor Time		<input type="button" value="Print & Post Work Order"/> <input type="button" value="Preview"/>		
Master Tracker Appointment Add Appt <input type="button" value="Add"/> Edit Appt <input type="button" value="Edit"/> Appointment:						Add Global Time <input type="button" value="Add"/> Global Total 15:00:00 +		Install Log Total Left to Install 4 Item Total 1:30:00 =		Select Time Total <input type="button" value="All"/> Total Time 16:30:00		
ID	Zone - Area	Install Location	Qty	Make	Model	Description	Serial Numbers	Item Entry	Qty Installed	Left To Install	Install Time	Edit Log
1	Zone 1 - Home Theater		5 pr	Linn	Katan			<input type="button" value="Add"/>	1	4	1:30:00	<input type="button" value="Edit"/>
3	Product				Bookshelf loudspeakers: pair							

Create a New POS Invoice		7203		Home	
User: Jim Engandela Location: 1 - EME Audio & Video					
<div> <div> RON ADAM RON ADAM INTERIOR DESIGN INC. </div> <div> <input type="button" value="Switch Contact"/> </div> </div>					
<div> <div> Add New POS Invoice </div> <div> <div> <input type="button" value="Quotation"/> </div> <div> <input type="button" value="Sales Invoice"/> </div> </div> <div> <div> <input type="button" value="Work Order"/> </div> <div> <input type="button" value="Service Orders Repair & OnSite with RMAs"/> </div> </div> </div>					
<div> <div> <input type="button" value="Change Order"/> </div> <div> <input type="button" value="Credit Memo"/> </div> </div> <div> <div> <input type="button" value="Purchase Order"/> </div> <div> <input type="button" value="Return Authorization"/> </div> </div>					
<div> <div> Add New WO Service Ticket </div> <div> <input type="button" value="WO Service Ticket"/> </div> </div>					



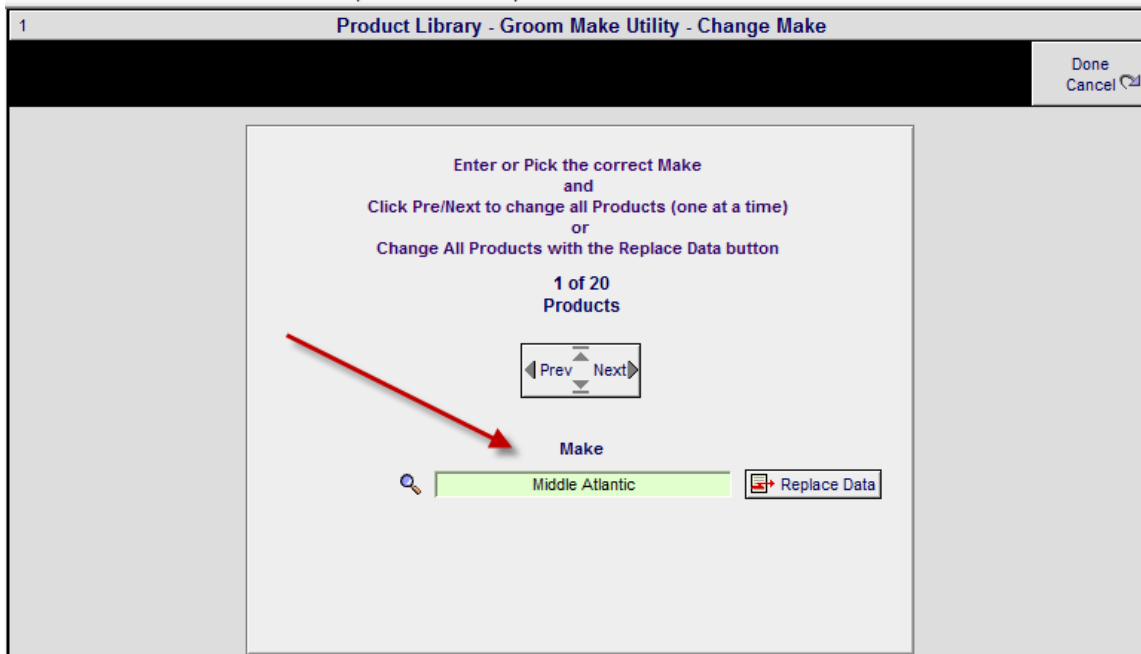
Fix – Proposal/Utility: Remove or Restore all Product Labor Supplements (Area Labor Totals)

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.

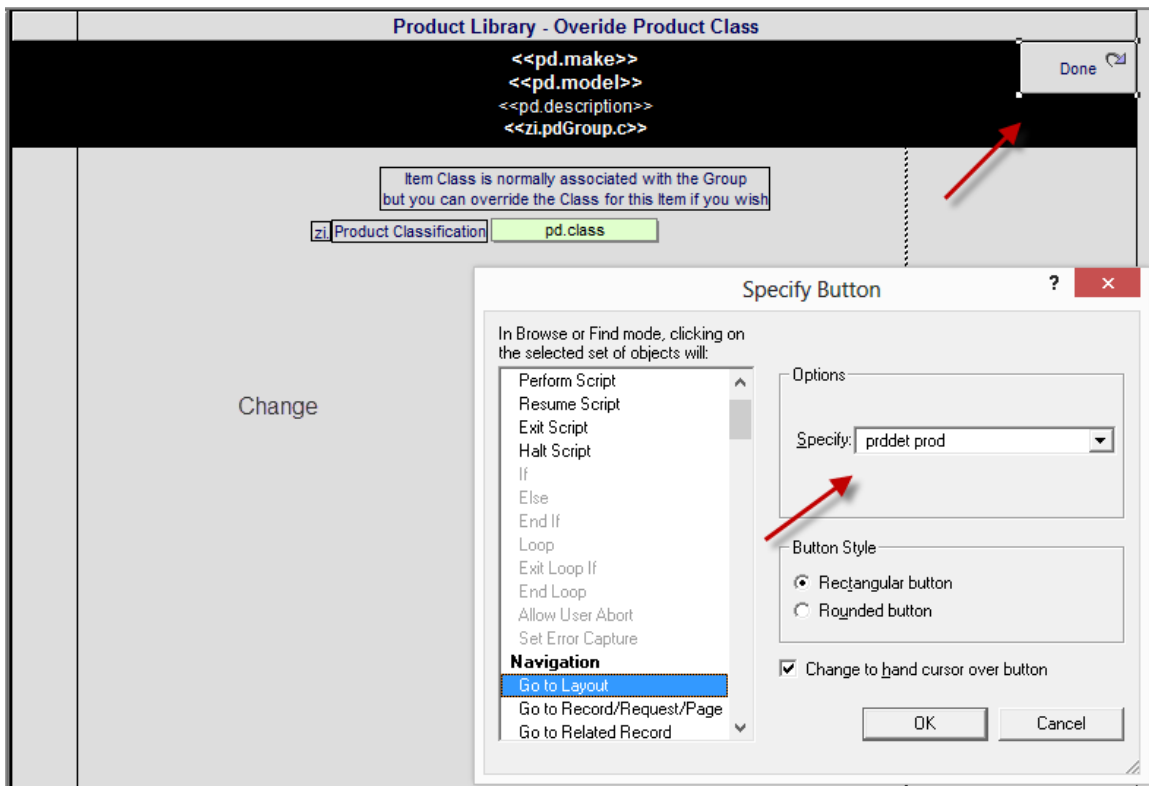


Fix – Proposal/Print Menu/Shop: Staging Reports Printing (Show All Records)

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.

All Supplements				Proposal - Wire Supplements				Phantom =		Adjust Bulk Wire - Home Runs					
				LeRoy Asher				Wire Detail		10,000 Sq Ft		Done			
Areas		Text						Wire Summary		120 ft per Home Run		Wire Manager			
Labor		Parts		Wire				Tasks		Adjust Bulk Wire - Room Runs		50% %			
				Not Itemized 1296.1-1.100											
All Areas				Wire Supplements				Itemized Wires = No				Wire Total: \$840.00			
Wire assigned to				View Edit		Class Sort		Bulk Run Type		Total Wire Qty		Wire & Cable Make : Model		No Labor Phz A B Tax Unit Sell Ext Sell	
Zone - Area		Qty		Make : Model											
Atrium		4		AAAA : 1234				Bulk		Home		480 ft		Linn : Bulk Analog 1 T T \$1.00 \$480.00	
Atrium		1		AAAA : 1234				Bulk		Home		120 ft		Linn : Bulk Analog 1 T T \$1.00 \$120.00	
Atrium		1		Supplemental Wire				Bulk		Home		240 ft		Linn : Bulk Analog 1 T T \$1.00 \$240.00	

Reset Project to Master Prefs **Proposal - Project Details**

Client **Project** **Tom Burke** **Sunbelt Business Brokers** **Home Theater System** **1298.1-1.100** **Done**

Info **Contacts** **Com Log** **Project Approval**

Proposal-Project Title **Home Theater System**

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

Hourly Labor Rates

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

Proposal Due Date Proposal Due **10/19/2006**

Install Phase Dates

Start Dates

1 - Prewire

2 - Trim **2/1/0001**

3 - Final **3/6/0001**

Completion Date Target Completion Date

Installation Notes

Labor Degree of Difficulty

Building Type **Frame**

Number of Floors **1**

Project Difficulty **0%**

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

Degree of Difficulty is changed by Building Type, Floors and Client Difficulty and is applied to Labor Time.

Supplemental Bulk Wire Lengths

Building Size **10,000** square feet

Bulk Home Run - Avg Wire Length: 120 per Home Run

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

Itemize each Wire & Cable entry: ☒ Yes ☐ No

Home Run Wire Length is changed by Building Size.
Room Run Wire Length is fixed. Wire Units come from Wire Product.
Itemize Wire & Cable only affects newly added 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.

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.

Proposal - Project Details

Client: Rick Schwamb

Project: Home Automation
1290.1-1.100

Proposal-Project Title: Home Automation

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

Proposal Due Date: 8/24/2011

Hourly Labor Rates:

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

Labor Degree of Difficulty: Building Type: Adobe, Number of Floors: 2, Project Difficulty: 3 %

Supplemental Bulk Wire Lengths: Building Size: 10,000 square feet

Bulk Home Run - Avg Wire Length: 270 per Home Run

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

Itemize each Wire & Cable entry: ☒ Yes ☐ No

Installation Notes:

Message: Updating Installation & Payment Type

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 be 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

Proposals
Projects
Costing
Custom

Home Automation
1290.1-1.100
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)

Product Staging

Print All

Part Staging

Print All

Wire Staging

Print All

Staging by Zone-Area (Total Qty)

Product Staging

Print All

Part Staging

Print All

Wire Staging

Print All

Staging by Discipline (Total Qty)

Product Staging

Print All

Part Staging

Print All

Wire Staging

Print All

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

5/28/2013

EME Audio & Video Systems - Confidential Report

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	<input type="checkbox"/>			
		Reference Subwoofer	Rc'vd	<input type="checkbox"/>			
		\$525.00 \$1,000.00	Stock	<input type="checkbox"/>			
			Delivered	<input type="checkbox"/>			
		#					
1 Prewire	1 ea	Middle Atlantic : ASR-42-HD : ASR-42-HD : Black	Order	<input type="checkbox"/>			
			Rc'vd	<input type="checkbox"/>			
		6 shelf adjustable slide out rotating	Stock	<input type="checkbox"/>			
		\$720.00 \$1,050.00	Delivered	<input type="checkbox"/>			
		#					
2 Trim	1 ea	Sonance : CR801 : 91807	Order	<input type="checkbox"/>			
		8" In-Ceiling CR801 Speaker	Rc'vd	<input type="checkbox"/>			
		\$75.00 \$162.50	Stock	<input type="checkbox"/>			
			Delivered	<input type="checkbox"/>			
		#					

5/28/2013

EME Audio & Video Systems - Confidential Report

Staging Document - Products

Page 1

Total Qty

Sorted by Make-Model

Rick Schwamb

Home Automation

1290.1-1.100

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	<input type="checkbox"/>				
		Reference Subwoofer	Rc'd	<input type="checkbox"/>				
			Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						
1 Prewire	1 ea	Middle Atlantic : ASR-42-HD : ASR-42-HD :	Order	<input type="checkbox"/>				
		Black	Rc'd	<input type="checkbox"/>				
		6 shelf adjustable slide out rotating	Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						
2 Trim	1 ea	Sonance : CR801 : 91807	Order	<input type="checkbox"/>				
		8" In-Ceiling CR801 Speaker	Rc'd	<input type="checkbox"/>				
			Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						

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.

Product Library - Product Entities

9 of 28 ?

Show All Items in Entities

Show only Un-Hidden Products in Entities

Linn

C2N-DB8

Audio : Speaker : Powered Subwoofer

Product

Done

Prev Next

Entity Types

Proposals

Projects and Change Orders

Completed

Archives

Entities this "Product" is attached to

Proposal	1269.1-1.10
Proposal	1270.1-1.10
Proposal	1271.1-1.10
Proposal	1272.1-1.10
Proposal	1272.2-1.10
Proposal	1274.1-1.10
Proposal	1276.1-1.10
Proposal	1277.1-1.10
Proposal	1279.1-1.10
Proposal	1280.1-1.10
Proposal	1281.1-1.10
Proposal	1282.1-1.10
Proposal	1282.1-1.10
Proposal	1283.1-1.10
Project	1268.1-1.10
Project	1273.1-1.10
Project	1275.1-1.10
Project	1284.1-1.10
Project	1284.1c2-1. Change Order: c2
Project	1285.1-1.10
Change Order	1284.1c1-1. Change Order: c1
Completed	1287.1-1.10

Entity Validity

Valid Product 1

No Delete 0

Valid Proposal/Project 1

Valid Part Group

Valid Part Manual

Valid Wire Group

Valid Wire Manual

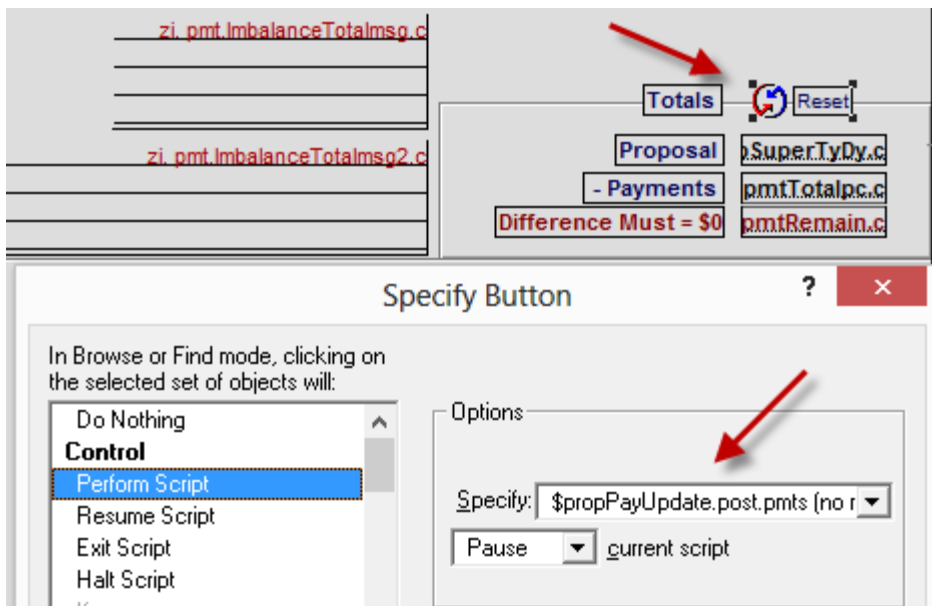
Enhancement – POS Service Order: Add Activity Log section to Printed SO Invoice

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.

Date	Specialist	Activity Log Notes
5/1/2013	Dave Dowling	1nonfaonfoaneioeioanoieifnonfienfienfiniweninfiwenfiwnpfn'inansinseisnfinisneine9

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.

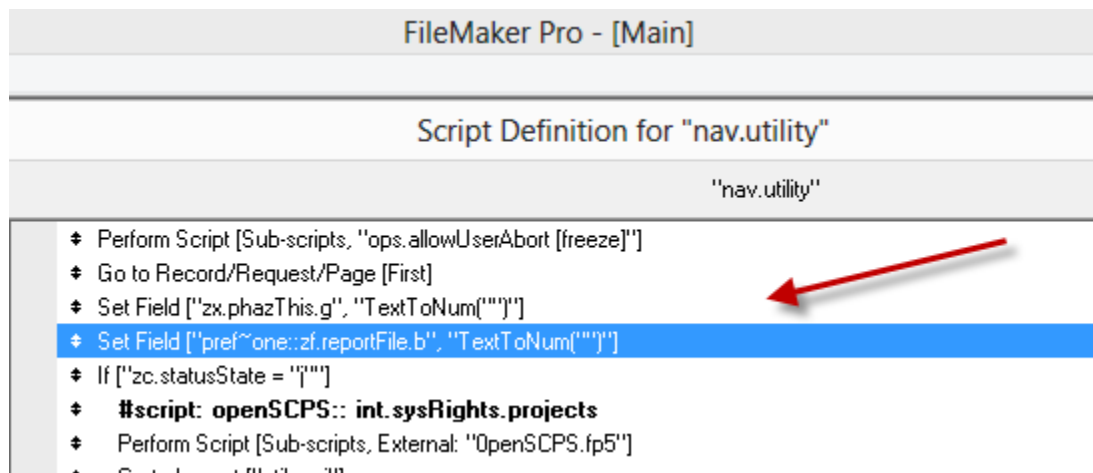


Fix – Proposal-Project: Wire Manager: Remove script messages

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.

POS - Find Invoice

Enter all of your desired Find criteria and then click Done

Invoice PO #7187

Client Barb

Company Precor

Date 9/28/2005

Specialst

Invoice Amount \$48.00

Amount Due


P.O. Status Open

P.O. Buyer Chad Trude

Quote & Sales Invoice Reference

PO Reference Lipson

Done ☐ Show All Including Done Invoices

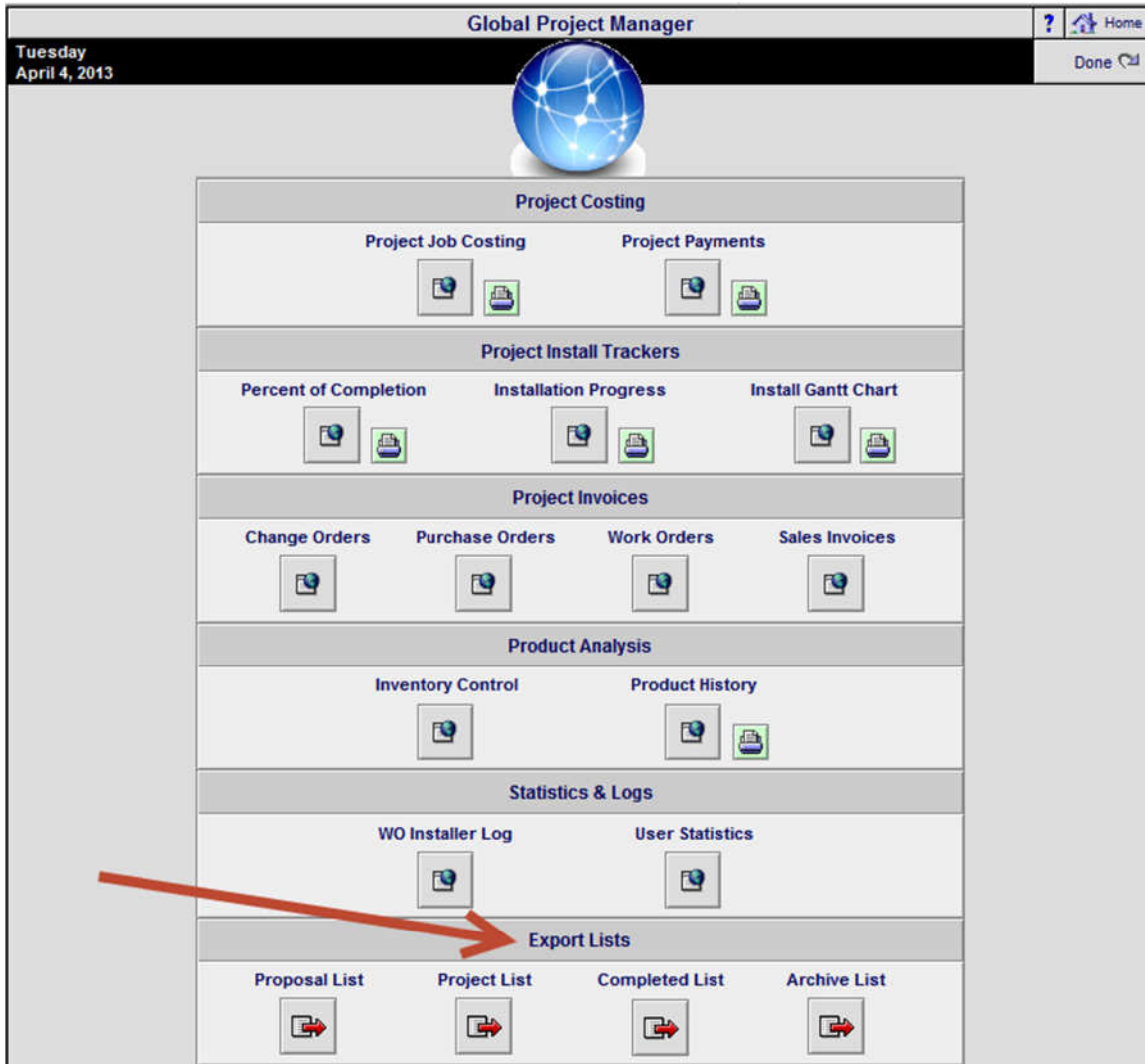


SCPS Version 10.1v1

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.

User Sales Commissions | Sort Users | Prev/Next | ? | Home

Jim Engandela
President

Done | Access Rights

Sales Commission Rates for this User

Commission based on Commission %

☒ Profit ☐ Gross Equipment % of Profit

☐ Profit ☒ Gross Labor % of Gross

☒ Profit ☐ Gross Parts % of Profit

☐ Profit ☒ Gross Wire % of Gross

☒ Profit ☐ Gross Fees % of Profit

- Shop Overhead % added to Total Costs (Commission based on Profit Only)

Commission screens are located in the Proposal, Project and Change Order Pricing/Commissions screens

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

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

Reset Comm to Master Prefs | **Proposal - Sales Commissions** | Printer Setup | ? | Print

Hayes Callahan

Done

Home Theater System
1283.1-1.100

Commissions for:
Jim Engandela
President

	Gross	Profit	- Overhead (Comm on Profit Only)	Commission Percent	Commission based on	Commission Amount
Equipment	\$22,909.95	\$9,203.55	<input type="text"/> %	10.0 %	<input checked="" type="radio"/> Profit <input type="radio"/> Gross	\$920.36
Installation	\$995.83	\$457.50	%	1.0 %	<input type="radio"/> Profit <input checked="" type="radio"/> Gross	\$99.58
Misc. Parts	\$200.00	\$81.00	%	10.0 %	<input checked="" type="radio"/> Profit <input type="radio"/> Gross	\$8.10
Wire & Cable	\$3,041.20	\$1,252.48	%	2.0 %	<input type="radio"/> Profit <input checked="" type="radio"/> Gross	\$304.12
Additional Fees	\$2,006.61	\$1,003.30	%	10.0 %	<input checked="" type="radio"/> Profit <input type="radio"/> Gross	\$100.33
Totals	\$29,153.59	\$11,997.83			Total Commission	\$1,432.49

Split Commissions

Proposal Salesman: Jim Engandela % **\$1,432.49**

Split Commission with: % **\$0.00**

When Splits are used, Total must equal 100%

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.

4/18/2013 **EME Audio & Video Systems - Confidential Report** Page 1
Staging Document - Products
Rick Schwamb
Home Automation
1290.1-1.100
RCMS ID: SCH49701

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	<input type="checkbox"/>			
		Reference Subwoofer		Rc'vd	<input type="checkbox"/>			
		\$525.00 \$1,000.00		Stock	<input type="checkbox"/>			
				Delivered	<input type="checkbox"/>			
		#						
1 Prewire	1 ea	Middle Atlantic : ASR-42-HD : ASR-42-HD :		Order	<input type="checkbox"/>			
		Black		Rc'vd	<input type="checkbox"/>			
		6 shelf adjustable slide out rotating		Stock	<input type="checkbox"/>			
		\$720.00 \$1,050.00		Delivered	<input type="checkbox"/>			
		#						
2 Trim	1 ea	Sonance : CR801 : 91807		Order	<input type="checkbox"/>			

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

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

Pricing Labor Commissions Labor Summary
Tax Summary Product Tax Fees Tax

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

POS - Find Invoice

Enter all of your desired Find criteria and then click Done

Invoice

Client

Company

Date

Specialst

Invoice Amount

Amount Due

P.O. Status

P.O. Buyer

Reference

Done ☐

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.

Delete All Wire Restore Wire Prices Proposal - Product Detail - Wire Supplements 1 of 3

Rick Schwamb
1290.1-1.100
Klipsch : RSW-10
Audio : Speaker : Powered Subwoofer

Degree of Difficulty
1 - Prewire 13%
2 - Trim 13%
3 - Final 13%

Proposal Detail

Prev Next

Product Specs Ptx - PDF's Labor Parts Wire Tasks 1 - Playroom

Wire Make Model Wire & Cable

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

Class	Bulk Run Type	Total Qty	Wire Make	Model/Description	No Labor	Install Phase	Unit Lab	Ext Labor	Unit Cost	Unit Sell	Ext Sell
Bulk	Room	75 ft	Linn	Bulk Analog interconnect	<input type="checkbox"/>	1	0:00:15	0:18:45	2.55	4.25	318.75
Bulk	Room	75 ft	Linn	Bulk Analog interconnect	<input checked="" type="checkbox"/>	1	0:00:15	0:18:45	2.55	4.25	318.75

Proposal - Pure Wire Supplements Refresh ? Done

Rick Schwamb
Home Automation
1290.1-1.100

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

Areas Text Products
Labor Parts Wire Tasks

Pure Labor Pure Parts Pure Wire

Pick an Area to view Disciplines
Pick Zone - Area
Zone 1 - Playroom

Pick a Discipline to view Wires
Pick Discipline
Wire & Cable

Disciplines in Zone 1 - Playroom
Delete
Supplemental : Items

Products in Zone 1 - Playroom
Make Model Phase
Klipsch : RSW-10
Audio : Reference Subwoofer 3
Sonance : CR801
Audio : 8" In-Ceiling CR801 Speaker 2
Middle Atlantic : ASR-42-HD
Furniture : 6 shelf adjustable slide out rotating 1

Pure Supplement Wire in : Discipline
Zone 1 - Playroom : Wire & Cable
Wire Make Model Add Wire

Qty	Make	Model	Phase	Unit Sell (h.m.s) Labor	Ext Sell Ext Labor	Discipline Assigned to...
270 ft	Linn	Bulk Analog interconnect	1	4.25	1,147.50	Wire & Cable Supplement
Bulk	Home	Analog interconnect	1	0:00:30	2:15:00	

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.

1280 **Proposal Utility - Administration** ? Done

Mr. & Mrs. Christenson
North American Fly LTD
Commercial Security System
1280.1-1.100

Change Proposal Number
This utility should be used with discretion.
This administration utility enables you to change the proposal numbers on existing proposals.
Entity numbers do not have to be unique to function properly.
New Entity Numbers must be higher than than the Highest Proposal Number.

Highest Proposal Number
1293

Proposal Number
1280

Proposal Version
1

Store Location
1

User Number
100

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.

Find Quote POS - Quotation List

Click on Quotation to view 53 Quotations

Done

View	Invoice	Client	Company	Specialist	Date	Amount Sold	Archive
QT #7202	Engandela, Jim	Horizon Software	Jim Engandela	3/29/2013			
QT #7199	Asher, LeRoy		Jim Engandela	3/27/2013			
QT #7195	Christenson, Cecilia	Wade Realty	Jim Engandela	4/25/2007	1,675.25		
QT #7190	Pryde, Laura & Robbie		Robert	9/29/2005	14,823.63		
QT #7172	Salter, Jamie & Sheryl	Gen-x Sports Inc.		9/22/2005	4,952.11		
QT #6991	Menkes, Peter &				10.27		
QT #7149	Kennedy, Bob				4.15		
QT #7138	Charette, Ginett				5.49		
QT #7119	Menkes, Alan				10.23		
QT #7099	Giampaolo **, T				5.00		
QT #6901	Pryde, Laura &				7.50		
QT #7010	Swadron, Wayn				14.91		
QT #7008	Swadron, Wayn				8.91		
QT #6966	Sapera, Matthe				6.54		
QT #6967	Glaser, Don & C				14.16		
QT #6960	Greenwald, Howard	HL Line Mfg. Co. Ltd.	Robert	8/10/2005			

Message

Sort Date in Ascending or Descending Order?

Descending Ascending

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

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

Print Setup Delete PO Duplicate PO POS - Purchase Order

Print Store Copy Preview

OPEN PO #7203 1 of 59 Set Up Done

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

Home 715-287-3337
Work: 715-287-3335
Mobile 715-695-0898
Fax: 715-287-4464

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

3/29/2013
Open

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]

Master Prefs - Product Group Utility

Done

Convert Case This utility will change the case of all of the product groups from CAPITALS to Normal case.

Trim Groups This utility will remove all of the carriage returns and blank spaces at the end of the product groups.

Change Groups on Multiple Products This utility enables you to find multiple Products and Assign a Product Group to all of them at one time.

Delete Groups Unassigned to Products This 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.

Clean
DeleteReset
UpdateFind
ChangeGeneral
ImportUser
ImportRCMS
ImportDistributor
ImportExport
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 Library 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

Clean
DeleteReset
UpdateFind
ChangeGeneral
ImportUser
ImportRCMS
ImportDistributor
ImportExport
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 - Override Product Labor to Group Labor**Reset - Products

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

Reset
Override
LaborReset - Parts & Wire

This will reset all the Override 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.

Update
Prices

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 - 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

Product Library Utility - Find & Change							451 of 451 ?
Done							
Clean Delete	Reset Update	Find Change	General Import	User Import	RCMS Import	Distributor Import	Export Products

Find Duplicate Products

Use this utility will find all products that have the same Make and Model number

Find Duplicates

Find Models with ()

Find Products with Orphaned Groups

Use this utility will find all products that do not have a group in Master Prefs. Please reassign them to Valid Groups.

Find Orphaned Groups

Find Products with Pictures and Pdf's

This utility will find all products that Pictures assigned to them.

Find All Products with Pix

This utility will find all products that have Embedded vs Linked Pix

Find Embedded vs Linked Pix

This utility will find all products that have PDF's attached to them.

Find All Products with PDF's

Change Groups on Multiple Products

This utility enables you to find multiple Products and Assign a Product Group to all of them at one time.

Change Groups on Multiple Products

Change Make Names

This utility enables you to Change the Make Names on Products in the Product Library

Change Make Names

Change Product Text Case

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

Change to Normal Case

Convert the Make, Description, Warranty, Group, Class and Install Notes to CAPS. Features will stay as entered.

Change to CAPS

Convert only Descriptions to CAPS.

Change to CAPS

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

Change Make to ALL CAPS

Change - Pix & PDF from Embedded to Linked

This Utility will take you to a screen where you will be able to change your Product Pix from embedded to linked references.

Change to Linked

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.

Find Products
Replace Data

Product Library - Product Detail
4 of 14
Home

Duplicate Product
Delete Product


Created: 1/8/2002
Sell Updated: 3/28/2013
Cost Updated: 8/8/2011
Product is in a Proposal/Project

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

New Product
Done
Prev
Next

Product
Specs
Pix
PDF
Labor
Parts
Wire
Tasks

Make Linn
Model 5101 Personal Handset
SKU
Finish Black

Sell Price \$500.00 ea


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

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

Unit ea
Net Price
Loading Calculator
Update

List \$700.00
Adjustment Type %

Sell \$500.00
Minimum Sell \$300.00
Net Cost \$234.00

Loaded Price
Sell \$500.00
Cost \$234.00
GP% 53.2%

Product & Supplements

	Product	Parts	Wire	Installed Price Total
Sell	\$500.00	\$1,385.00	\$1,380.00	\$3,265.00
Labor	\$90.00	\$62.50	\$277.50	\$430.00
Total	\$590.00	\$1,447.50	\$1,657.50	\$3,695.00

View Product, Parts, Wire & Labor Costs
GP% 44.1%

Group Audio : Multi-room : Keypad
Class Product
Phase 2 Trim

Status
Favorite A
Tax A T
Phantom Product
Fee SKU
Tax B T
Proposal Sort Order m

Options
New Item
Hide this Item
Discontinued Item
Display Installed Price
Do not Hide
Do not Delete
Do not Discount
Issue Staple Up Card

Inventory
Qty
Cost Value
Quantity On-Hand 0
Optimum Qty 6 \$1,404.00
Order Now - Order Qty 6 \$1,404.00
Delivery Lead Time 7 Days

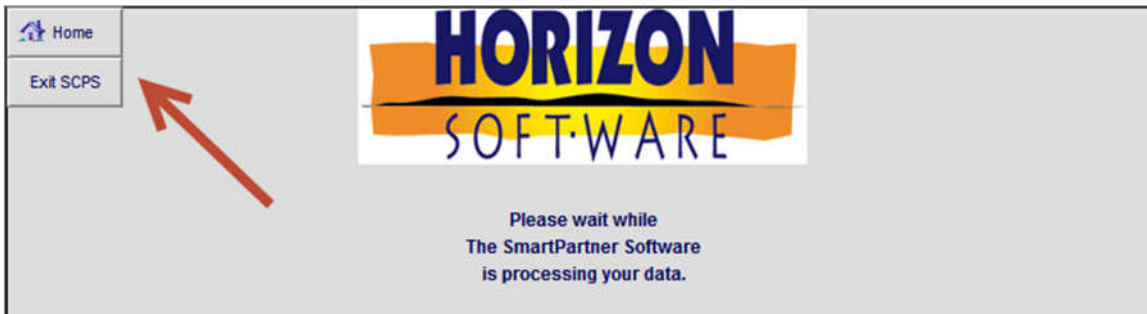
Purchasing
Product Description (Purchase Order)
Alternate PO Vendor
Optional Product Cost
Optional Vendor
Buy Package Option
Buy Pkg
Buy Pkg Qty

Work Orders
Alternate Product Listing (Work Order & Wire Mgr)
Product Installation Notes (Work Order)

Linn
5101 Personal Handset
Universal learning remote
Black
LinnsonalHandsetBla
Validation = MakeModelFinish and should not exceed 25 characters.

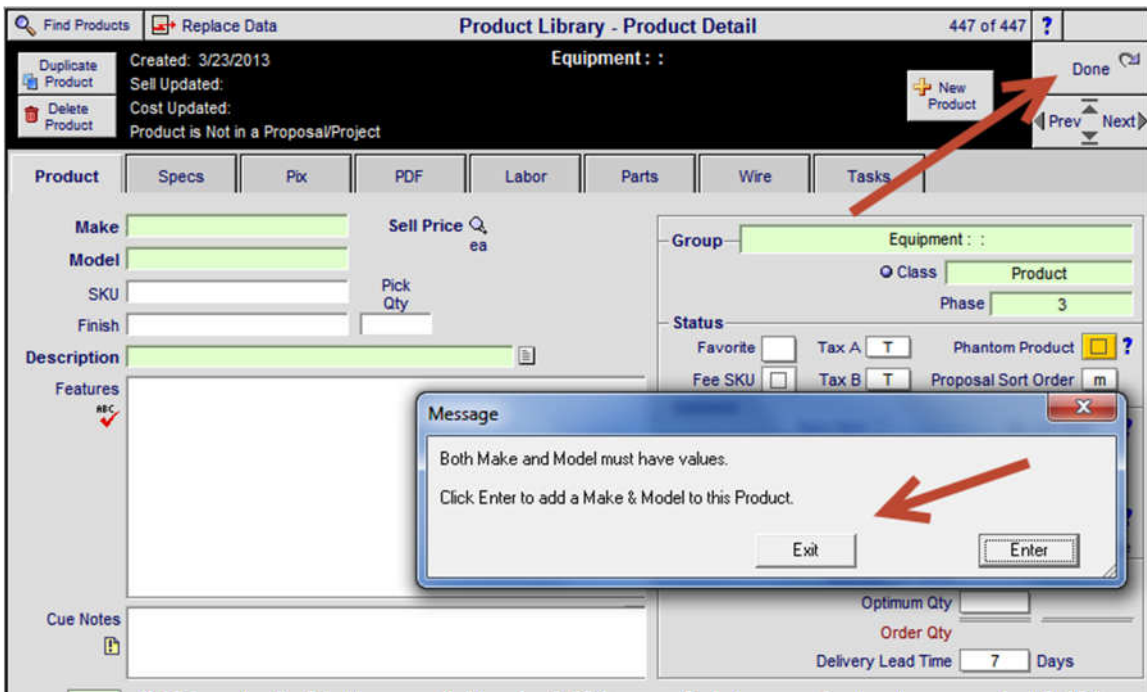
Enhancement – Master Preferences/POS Defaults: Hide Labor Matrix on POS Invoices

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.



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		EME audio & video
	Directed to Parts Subtotal	Directed to Labor Subtotal
Audio Distribution Diagram <input type="checkbox"/> <input checked="" type="checkbox"/> \$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 <input checked="" type="checkbox"/> <input type="checkbox"/> \$25.00 Digital Photos of the prewire and final installation taken, cataloged and stored on 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 <input type="checkbox"/> <input type="checkbox"/> \$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.

Proposal - Pure Wire Supplements

Refresh ?

Rick Schwamb

Home Automation
1290.1-1.100

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

Done

Areas Text Products

Labor Parts Wire Tasks

Pure Labor Pure Parts Pure Wire

Pick an Area to view Disciplines

Areas

Pick Zone - Area

Zone 1 - Playroom

Pick a Discipline to view Wires

Disciplines in Zone 1 - Playroom

Pick Discipline

Wire & Cable

Supplemental : Items

Delete

Products in Zone 1 - Playroom

Make Model Phase

Klipsch : RSW-10

Audio : Reference Subwoofer 3

Sonance : CR801

Audio : 8" In-Ceiling CR801 Speaker 2

Middle Atlantic : ASR-42-HD

Furniture : 6 shelf adjustable slide out rotating 1

Pure Supplement Wire in : Discipline

Zone 1 - Playroom : Wire & Cable

Wire Make Model

Add Wire

Qty	Make	Model	Phase	Unit Sell (h:m:s)	Labor	Ext Sell	Ext Labor
270 ft	Linn	Bulk Analog interconnect	1	4.25	1,147.50		
Bulk	Home	Analog interconnect	1	0:00:30	2:15:00		

Message

Select Install Phase 1, 2 or 3

3 2 1

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.

All Supplements Delete All Wire
 Proposal - Wire Supplements
 Phantom = Adjust Bulk Wire Home Runs
 Home

Rick Schwamb
 Home Automation
 1290.1-1.100

Wire Detail 10,000 Sq Ft Update
 270 ft per Home Run

Wire Summary Adjust Bulk Wire Room Runs 100 % Update

Done

Wire Manager

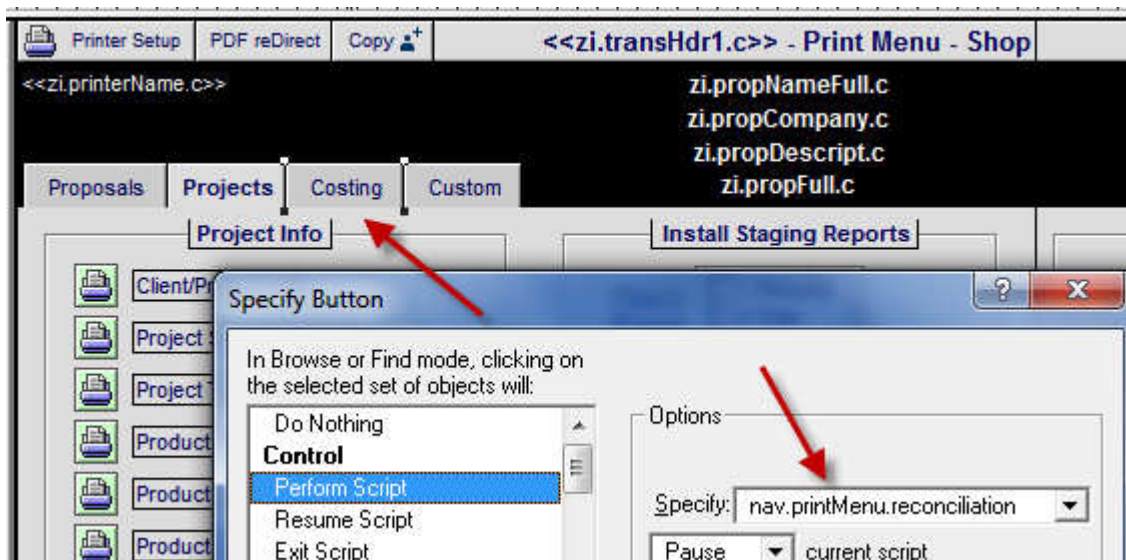
All Areas Wire Supplements Itemized Wires = Yes Wire Total: **\$1,506.50**

Zone - Area	Qty	Make : Model	View Edit	Class Sort	Bulk Run Type	Wire Qty	Wire & Cable Make : Model	No Labor	Phz	Tax A B	Unit Sell	Ext Sell
1 - Playroom	1	Klipsch : RSW-10		Bulk	Room	75 ft	Linn : Bulk Analog		1	T T	\$4.25	\$318.75
1 - Playroom	1	Klipsch : RSW-10		Bulk	Room	75 ft	Linn : Bulk Analog		1	T T	\$4.25	\$318.75
1 - Playroom	1	Sonance : CR801		Bulk	Home	270 ft	Monster : 16/2 Spkr Wire		1	T T	\$0.45	\$121.50
1 - Playroom	1	Supplemental Wire		Bulk	Home	270 ft	Linn : Bulk Analog		1	T T	\$4.25	\$1,147.50

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.

Print Menu <<mPref~mProp::zi.shopName.c>> - Confidential Report									
Staging Document - Products									
<<main~mProp::zi.propNameCompany.cc>>									
<<main~mProp::zi.propDescript.c>>									
<<mPref~mProp::zi.propFull.cc>>									
Total Qty Sorted by Make-Model									
Phase-Class	Qty	Make-Model-SKU-Finish-Unit Cost-Unit Sell	Ck	InStock	OnOrder	Date	Initial		
pd phase	zt pdQty.s	zi.mProdMakeModelSKUfinish.cc	Order						
			Rc'vd						
		pd.description.lo	Stock						
		pd.unit.cost.lo	Delivered						
		zt.pd.sellAdj.c							
#									

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.



SmartPartner SOFTWARE

High Definition Proposal & Project Management System

Master Tracker	Contacts	Proposals	Product Library	Project Manager
Utilities	Info	Projects	Sets Library	CPS
Preferences	Forms	Completed	Text Library	Archive
GraphicsDraw	Follow-Up	Point of Sale	Letter Library	User Login

Thursday
February 28, 2013

User: Jim Engandela - 100
Level: Administrator Fav: Global
Location: 1 - EME Audio & Video Systems



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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.

Discipline				Area				Phase				Proposal - Detail by Area				Utilities				Home							
Client				Areas				Prefs				Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100				Pricing				Invoicing				Leave			
Project				Info				Products				Area Text				Payments				Purchasing				Tracker			
Contact				Log				Supplements				Overviews				Project Fees				Work Orders				Print Menu			
Client Mode				<input type="checkbox"/> Wire Manager				Super View								Labor Meter				Change Orders				Grand Total			
Discipline : Category : Type												Qty Make : Model				Description											
Home Entertainment System																											
Zone 1 - Home Theater																						12,173.23					
Video : Display : DLP Video Projector												1 ea Runco : CL-610				DLP Projector				7,995.00							
Video : Source : DVD Player												1 ea Sony : DVD NS900ES				Progressive Scan DVD Player				1,099.95							
Automation : Remote : Handheld Remote																				390.00							
Automation : Control : Keypad																				750.00							
																						12,433.75					
Audio : Speaker : Center Channel																				399.00							
Audio : Speaker : Floor																				998.00							
Audio : Speaker : Bookshelf																				900.00							
Audio : Speaker : Powered Subwoofer																				1,000.00							
Audio : Amplifier : Surround Receiver												1 ea Linn : Classik Movie Di				Integrated multi-channel DVD-CD				3,995.00							
Audio : Speaker : Floor												1 pr Linn : Ninka				Floor-standing loudspeakers: pair				1,850.00							

Message

Do you want to Quickly View your Contacts or Products?

Products Contacts Cancel

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

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.

Enable All		Disable All		User Access Rights				Sort Users		Prev/Next		Home	
User Assignable Favorites		No "Add Product" Prompt		Jim Engandela President				PC Screen Size		Horizon Screen		Done	
<input type="checkbox"/>		<input type="checkbox"/>		Checked boxes have Access Rights Unchecked boxes do not have Rights				Screen Magnification		100%		Commissions	
Module/Screen Access				Access Level				Projects					
<input checked="" type="checkbox"/> Preferences <input checked="" type="checkbox"/> Project Manager <input checked="" type="checkbox"/> Module Utilities <input checked="" type="checkbox"/> Proposal & Project Admin Utility <input checked="" type="checkbox"/> Proposal & Project Commissions <input checked="" type="checkbox"/> Proposal Custom Print Layouts <input checked="" type="checkbox"/> CPS Custom Proposal System access <input type="checkbox"/> Do not allow SCPS access Allow only CPS access				Administrator Administrators see all Proposals & Projects Managers see their Proposals & Projects and the users that they manage Users only see their Proposals & Projects				<input checked="" type="checkbox"/> Change Orders <input checked="" type="checkbox"/> Purchase Orders <input checked="" type="checkbox"/> Work Orders <input checked="" type="checkbox"/> Sales Invoices <input checked="" type="checkbox"/> Override Print Menu Prefs & Print Options Project Lockout					
Proposals & Change Orders				Proposals - Projects - Completed Archives - Change Orders				Point of Sale					
<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Archive <input checked="" type="checkbox"/> Add Supplements (Labor, Parts, Wire) <input checked="" type="checkbox"/> Delete Supplements <input checked="" type="checkbox"/> Add New Tax Codes Edit				<input checked="" type="checkbox"/> Convert Proposals - Projects Conversions Proposal > Project > Completed Archived Proposals <input checked="" type="checkbox"/> Restore Text Library				<input checked="" type="checkbox"/> Delete/Archive Invoices Edit <input checked="" type="checkbox"/> Sell Price					
								Product Library					
								<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Duplicate <input checked="" type="checkbox"/> Hide Including Labor, Parts, Wire Supplements Edit <input checked="" type="checkbox"/> List Price					

Find Products Replace Data Product Library - Product Detail 2 of 6 ? Home

Duplicate Product Created: 4/6/2006 Crestron
Delete Product Sell Updated: 8/8/2011 AADS
Cost Updated: 8/8/2011 Adagio Audio Distribution System
Product is Not in a Proposal/Project Audio : Multi-room : Switcher

Product Specs Pix PDF Labor Parts Wire Tasks

Make: Crestron Sell Price: \$2,500.00 ea
Model: AADS
SKU:
Finish: Black

Description: Adagio Audio Distribution System

Features: Sources 1-4: (16) RCA female, Tuner Out-A: (2) RCA female, Tuner Out-B: (2) RCA female, Net 1-6: (6) 4-pin 3.5mm detachable terminal blocks, IR Out 1-4: (4) 3.5mm TRS mini-phone jack, IR/Serial port, COM A: (1) DB9 male, bidirectional RS-232 port, Computer: (1) 6-pin RJ11 female, bidirectional RS-232 computer console port, LAN: (1) 8-wire RJ45 w/ 2 LED indicators, Net: (2) 4-pin 3.5mm detachable terminal blocks, Rooms 1-6: (12) 2-pin 7.62mm detachable terminal blocks, power amplifier outputs; FM Ant: (2) IEC 169-2 coaxial, AM Ant: (2) 2-pin spring-loaded terminals

Cue Notes

Unit: ea Net Price Loading Calculator
List Adjustment Type %

Group: Audio : Multi-room : Switcher
Class: Product
Phase: 2 Trim

Status: Favorite ☐ Tax A: T Phantom Product ☐ ?
Fee SKU ☐ Tax B: T Proposal Sort Order: m

Options: New Item ☐ Do not Hide ☐ ?
Hide this Item ☒ Do not Delete ☐
Discontinued Item ☐ Do not Discount ☐
Display Installed Price ☐ Issue Staple Up Card ☐ ?

Message: Your access rights do not allow you to Hide this Product. Please check your Rights in the Master Prefs/Users/Access Rights screen. OK

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.

Discipline	Area	Phase	Proposal - Phase Subtotals				Print	Home
Subtotals	Subtotals	Subtotals	Karen & Andy Nelson				Done	
Grand Totals	Grand Totals	Grand Totals	Telephone System 1271.1-1.100				Show Sales Tax <input checked="" type="radio"/> yes <input type="radio"/> no	Client Mode <input type="checkbox"/>
Phase			Sell	Cost	Gp%	Labor (h:m:s)		
Telephone System	Equipment		51,734.72	23,671.40	54.2%			
	Installation		2,643.33	1,409.17	46.7%			
	Misc. Parts		400.00	238.00	40.5%			
	Wire & Cable		6,531.65	3,837.69	41.2%			
	Additional Fees		3,601.99	1,800.99	50.0%			
	Total		\$64,911.69	30,957.25	52.3%	41:35:00		
	Tax		\$3,372.03					
	Grand Total		\$68,283.72					
1 - Prewire	Equipment							
	Installation		855.00	490.00	42.7%			
	Misc. Parts							
	Wire & Cable		4,171.75	2,421.75	41.9%			
	Additional Fees		1,124.69	562.35	50.0%			
	Total		6,151.44	3,474.10	43.5%	14:15:00		
	Tax		276.47					
	Phase 1 Total		6,427.92					

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

Products - Supplement
No Fees included

Product - Make - Model Part Wire	Qty	Unit Cost	Average Unit Sell	Ext Sell
Labor (h:m:s) 6:45:00 Installation Phase: 1				
Products, Parts & Wire Total:				\$2,341.25
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
Labor (h:m:s) 0:45:00 Installation Phase: 2				
Products, Parts & Wire Total:				\$770.00
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
Labor (h:m:s) 7:50:00 Installation Phase: 3				
Products, Parts & Wire Total:				\$23,039.90
Labor Total:				\$548.33
Phase Total without Fees:				\$23,888.57
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.

Clear All Entries **Find Proposal - Utility**

Populate Pop Up Lists

Enter find criteria and click the Done/Find button

Done Find 

Cancel

Entity Number


Date Range
creation date from proposal list
Today 3/5/2013

Start Date to

Shop Location

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

Payment Director **Master Prefs - Installation Type** Print ? Home

Install Type **Phases** Install Types determine which products, labor, parts & wire are directed to what install phases Done

New

Installation Type			Install Phase Director														
Default			Phase 1				Phase 2				Phase 3						
Type	Number of Phases	Description	Director				Director				Director						
			Equip	Labor	Part	Wire	Phase Label	Equip	Labor	Part	Wire	Phase Label	Equip	Labor	Part	Wire	Phase Label
New	1	Prewire	1	1	1	1	Prewire	2	No	No	No		3	No	No	No	
New	2	Pre-Trim	1	1	1	1	Prewire	2	2	2	2	Trim	3	No	No	No	
New	3	Pre-Trim-Final	1	1	1	1	Prewire	2	2	2	2	Trim	3	3	3	3	Final
Retro	1	Pre plus Trim plus Final	1	1	1	1	Pre+Trim+Fin	1	1	1	1		1	1	1	1	
Retro	2	Pre plus Trim-Final	1	1	1	1	Pre+Trim	1	1	1	1	Final	2	No	No	No	
Retro	2	Pre-Trim plus Final	1	1	1	1	Prewire	2	2	2	2	Trim+Final	2	No	No	No	

Message

This Install Type is currently being used in a Proposal or Project and should not be deleted.
The Install Type, Number of Phases and Description should also not be changed.

OK

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.

Reset Project to Master Prefs **Proposal - Project Details** Printer Setup ? Print

Client **Project** Done

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

Proposal-Project Title
Home Entertainment System

Hourly Labor Rates

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

Labor Degree of Difficulty Update

Building Type **Frame**

Number of Floors **1**

Project Difficulty **10** %

1 - Prewire	2 - Trim	3 - Final
10%	10%	10%

Degree of Difficulty is changed by Building Type, Floors and Client Difficulty and is applied to Labor Time.

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

Proposal Due Date Update
Proposal Due 5/11/2007

Install Phase Dates

Start Dates

1 - Prewire	2 - Trim	3 - Final
	2/1/0001	3/6/0001

Completion Date
Target Completion Date

Installation Notes

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.

Define Fields for "MainPref.fp5"

1287 field(s)

Field Name	Type	Options
zf.hideFooterInitial...	Number	Indexed, Lookup
zi.intitals.u	Calculation	Unstored, = Case(zf.hideFooterInitials.lo <> 1,"Initials____","")

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.

9.9

If importing SCPS version
is after to 8.6 this
should = 1

za.version_8.6_flag.n

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

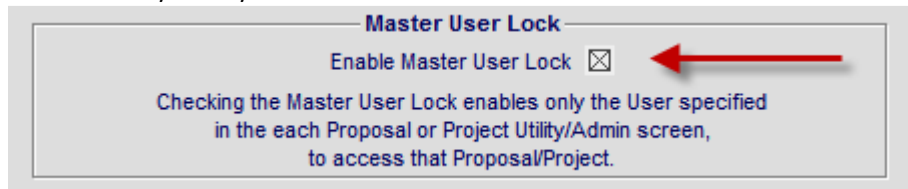
Released: 2/13/2013

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

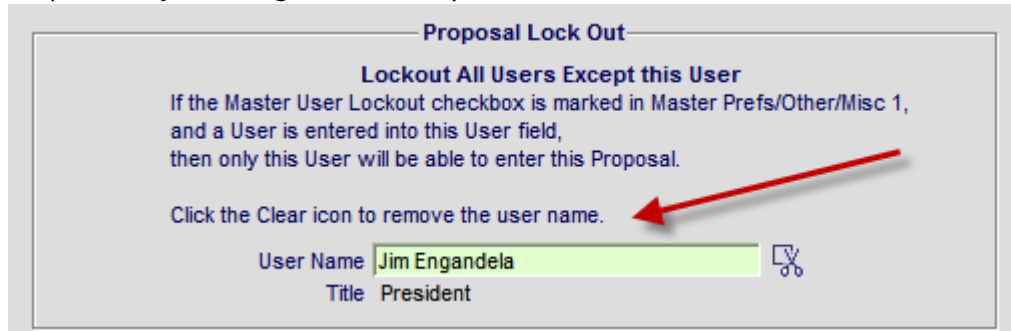


Master User Lock

Enable Master User Lock ☒ 

Checking the Master User Lock enables only the User specified in the each Proposal or Project Utility/Admin screen, to access that Proposal/Project.


Proposal-Project-Change Order/Utility/Admin screen




Proposal Lock Out

Lockout All Users Except this User

If the Master User Lockout checkbox is marked in Master Prefs/Other/Misc 1, and a User is entered into this User field, then only this User will be able to enter this Proposal.

Click the Clear icon to remove the user name. 

User Name 

Title President

Proposal-Project-Completed-Archived/List screens

Find Proposals Fav A B C Proposals Sort Print ? Home

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

Access Levels
 Administrator
 Manager
 User

EME audio & video
 User: Jim Engandela - 100 - Level: Administrator
 Location: 1 - EME Audio & Video Systems
 5 Proposals

Leave Projects Archive

■ = Global Proposal

Status	Dup View	Number	User	Client	Company	Proposal Title	Created	Total	Fav
		1283.1-1.100		Callahan, Hayes		Home Theater System	9/12/2006	\$21,614	
		1282.1-1.100		Potter, Mike & Jessica		Security System	9/12/2006	\$60,553	
		1274.1-1.100			Sunbelt Business Brokers	Home Theater System	9/12/2006	\$24,590	
		1273.1-1.100		Hawn, Dr.	Chippewa Valley Eye Clinic	Home Entertainment	9/12/2006	\$65,666	
		1267.1-1.100		Engandela, Jim	Horizon Software	Home Entertainment	9/11/2006	\$43,945	

Dave Dowling

This Proposal/Project can only be entered by this User. The User Lock is specified in the Utility/Admin screen. Please contact your SCPS administrator.

OK

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.

PDF Creator Plus 5.0, winspool, NUL

Printer Setup Proposal - Print Menu - Shop Refresh Reports ? Home

Jim Engandela
Horizon Software
Home Entertainment System
1267.1-1.100

Approval Form Approval Package Project Approval Done Wire Manager

Proposals Projects Costing Custom

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

- Purchase Order Products
with serial numbers
- Sales Invoice Products
with serial numbers

Product Labor Sub Categories

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

Install Staging Reports

Select Phases ☒ 1 Prewire ☒ 2 Trim ☒ 3 Final

Staging by Make-Model (Total Qty)

- Product Staging
- Part Staging
- Wire Staging

Staging by Zone-Area (Total Qty)

- Product Staging
- Part Staging
- Wire Staging

Staging by Discipline (Total Qty)

- Product Staging
- Part Staging
- Wire Staging

Export Product Staging Items

Staple Up Cards & Labels

Staple Up Cards Labels

Select Wire & Cable to show on Cards & Labels ☐ Bulk ☐ PreCut

There will be 1 Card/Label for Each Unit Qty

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

Project Products

Project Parts

Project Wire

Project Summary & Export

- Product Sum List
Qty Sum of Project Items and CO's
- Wire Sum List
Qty Sum of Project Items and CO's
- Parts Sum List
Qty Sum of Project Items and CO's
- All Sum List
Qty Sum of Project Items and CO's

Product Summary Reports

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

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.

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*

Project Products



Project Parts



Project Wire



EME Audio & Video Systems - Reconciliation Report

Page 1

Product Line List

John & Mary Smith
Home Entertainment System
1284.1-1.100

Sum Mode Quantities include Change Order Additions & Deletions

Sum Mode

Make : Model

<u>Zone - Area</u>	<u>CO#</u>	<u>Qty</u>	<u>Finish - Description</u>	<u>PO On Back Order</u>	<u>WO Left to Install</u>	<u>SI Left to Invoice</u>
	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						
Make : Model						
<u>Zone - Area</u>	<u>CO#</u>	<u>Qty</u>	<u>Finish - Description</u>	<u>PO On Back Order</u>	<u>WO Left to Install</u>	<u>SI Left to Invoice</u>
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

2/7/2013

EME Audio & Video Systems - Reconciliation Report


Page 1

Parts Line List

John & Mary Smith
Home Entertainment System
1284.1-1.100

Sum Mode Quantities include Change Order Additions & Deletions

Proj Mode



<u>Zone - Area</u>	<u>CO#</u>	<u>Qty</u>	<u>Make : Model</u>	<u>PO</u> <u>On Back</u> <u>Order</u>	<u>WO</u> <u>Left to</u> <u>Install</u>	<u>SI</u> <u>Left to</u> <u>Invoice</u>
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

Page 2

John & Mary Smith
Home Entertainment System
1284.1-1.100

Sum Mode Quantities include Change Order Additions & Deletions

Proj Mode

<u>Zone - Area</u>	<u>CO#</u>	<u>Qty</u>	<u>Make : Model</u>	<u>PO On Back Order</u>	<u>WO Left to Install</u>	<u>SI Left to Invoice</u>
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	Print	Home
Areas	Text	Products	Show All	Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100				Update All Products	Delete All Options	Done
Labor	Parts	Wire	Tasks	Show Tagged	Orphan =	Phantom =	Auto Price Adjuster	Update Tagged Products	Switch Tagged Products	Install Location Notes
Tag	View	Qty	Zone - Area	Make	All 24 Products	Product Labor	Unit List	Adjusted Sell	Extended Sell	
Delete	Option	Switch	Change	Discipline	Category	Parts Labor	Unit Cost	Unit Sell	Ext Installed	
No Discnt	No \$	Product	Group	Phase	Type	Wire Labor	Updated Sell	GP%	Ext Discount	
<input type="checkbox"/>	<input type="checkbox"/>	1	ea	1 - Home Theater	Runco	CL-610	110.00	7,995.00	7,995.00	
<input type="checkbox"/>	<input type="checkbox"/>	3	1267.1	Video	Display	DLP Projector	4,797.00	7,995.00	8,105.00	
<input type="checkbox"/>	<input type="checkbox"/>	3	1267.1	DLP Video Projector		99.95	8/2/2011	40.0%		
<input type="checkbox"/>	<input type="checkbox"/>	1	ea	1 - Home Theater	Sony	DVP-NS999ES	35.00	1,199.95	1,099.95	
<input type="checkbox"/>	<input type="checkbox"/>	3	1267.1	Video	Source	Progressive Scan DVD	620.40	1,099.95	1,134.95	
<input type="checkbox"/>	<input type="checkbox"/>	3	1267.1	DVD Player	Black	120.00	8/2/2011	43.6%	-100.00	
<input type="checkbox"/>	<input type="checkbox"/>	1	ea	1 - Home Theater	Linn	5101 Personal Handset	73.33	390.00	390.00	
<input type="checkbox"/>	<input type="checkbox"/>	3	1267.1	Automation	Remote	Universal learning remote :	234.00	390.00	463.33	
<input type="checkbox"/>	<input type="checkbox"/>	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.

Super View Area Sum Prod Sum ☐ Client Mode **Proposal - Products** Total \$3,595.00

Areas Text Products Hayes Callahan

Labor Parts Wire Tasks Show Tagged Home Theater System 1283.1-1.100 Orphan = Auto Price Adjuster

Tag	View	Qty	Zone - Area	Make	All 3 Products	Product Labor	Unit List	Adjusted Sell	Extended Sell
No Discnt	No \$		Discipline Phase	Category Type	Model Description	Parts Labor Wire Labor	Unit Cost	Unit Sell GP%	Ext Installed Ext Discount
<input type="checkbox"/>	<input type="checkbox"/>	1	ea 1 - Home Theater	Klipsch	RS7	63.25	450.00	465.00	465.00
<input type="checkbox"/>	<input type="checkbox"/>		Audio	Speaker	Reference Surround		236.50	465.00	528.25
<input type="checkbox"/>	<input type="checkbox"/>	3	1283.1 Bookshelf		Matte Black	205.50	2/5/2013	49.1%	15.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	ea 1 - Home Theater	Linn	5125	167.75		2,765.00	2,765.00
<input type="checkbox"/>	<input type="checkbox"/>		Audio	Amplifier	Five channel power	255.00	1,650.00	2,765.00	2,932.75
<input type="checkbox"/>	<input type="checkbox"/>	3	1283.1 Multi-channel		Silver	672.45	2/5/2013	40.3%	
<input type="checkbox"/>	<input type="checkbox"/>	1	ea 1 - Home Theater	Linn	5101 Personal Handset	596.93		365.00	365.00
<input type="checkbox"/>	<input type="checkbox"/>		Automation	Remote	Universal learning remote :	900.00	234.00	365.00	961.93
<input type="checkbox"/>	<input type="checkbox"/>	3	1283.1 Handheld Remote		Black	739.95	2/5/2013	35.9%	

Message

This Utility will either Check or Clear All Product Tag or Delete Boxes. Cancel if you want to first Find desired Underlined Products.

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.

2738

Proposal - Client & Project - Alternate Billing

Check to use this Contact info on all Project Sales Invoices

Done

**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

Last Name

Company

Proposal Name

Fav Format

Billing Numbers

Home Phone Ext.

Work Phone Ext.

Chris mobile Ext.

Cell Phbee

Fax 1

Billing Address

City

State Zip

Country

Select Tax Update

Tax ☒ Yes ☐ No New Tax

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

eMail

Click eMail button to send eMail to Client

eMail Address

Cover Page Billing Label

Select Proposal Cover Page Option

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

(H) 4144250186

Cover Page Billing Label

Select Proposal Cover Page Option

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

(H) 4144250186

Cover Page Billing Label

Select Proposal Cover Page Option

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

Cover Page Billing Label

Select Proposal Cover Page Option

3 Show Client Address and Billing Address

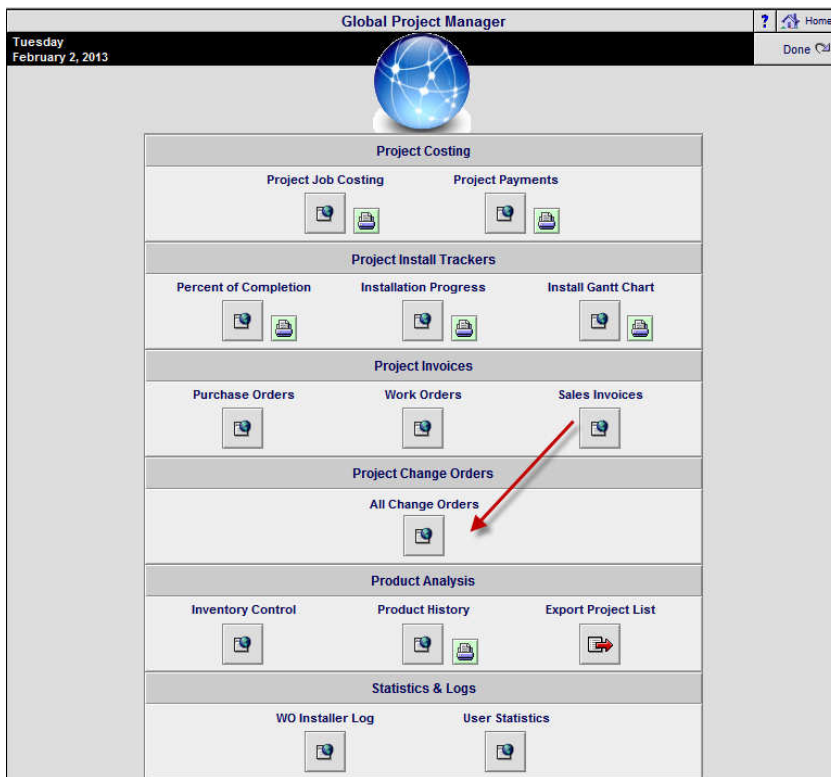
Mr. & Mrs. Christenson
North American Fly LTD
567 58TH Street
Oakland, CA 94607

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

(H) 4144250186

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.



		Master Project - Current Change Orders						Print		?		Home
<div>All Project Change Orders</div>		John & Mary Smith						All Projects				
								This Project				
		Home Entertainment System 1284.1-1.100										
Current Change Orders												
View	Status	Date Created	CO Number	Change Order Title			CO Total	Pymts Made	Balance Due	Del		
	Pending	9/12/2006	1284.1c1-1.100	Home Entertainment System			\$95,624.37					
	Final	9/12/2006	1284.1c2-1.100	Home Entertainment System			\$26,492.37		\$26,492.37			
	Final	4/25/2007	1284.1c3-1.100	Home Entertainment System			\$95,624.37		-\$1,427.78			

All Project Change Orders									
Sorted by Pending Change Orders/CO Number, then Final Change Orders/CO Number									
View	Status	Date Created	CO Number	Client Name	Client Company	Change Order Title	CO Total	Pymts Made	Balance Due Del
	Pending	9/12/2006	1268.1c1-1.100	Dana Berkow	Company Name	Home Entertainment System	\$945.25		
	Pending	9/12/2006	1284.1c1-1.100	John & Mary Smith		Home Entertainment System	\$95,624.37		
	Final	9/12/2006	1284.1c2-1.100	John & Mary Smith		Home Entertainment System	\$95,624.37	\$26,492.37	
	Final	9/12/2006	1284.1c3-1.100	John & Mary Smith		Home Entertainment System	\$95,624.37		

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 Change Order.

The screenshot shows the 'Proposal - Areas & Products' interface. The 'Area Sum' tab is selected. A message dialog box is displayed with the text 'There are no Areas in this Entity.' and an 'OK' button. The background interface includes fields for 'Loc', 'Zone', 'Area', and 'Products in the'.

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.

Add Pure Labor Supplement - Type & Time

Eileen Back Done

Home Entertainment System Cancel

1290.1-1.100

Atrium
Audio

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

Labor Type	Labor Rate	Labor Time			Total (h.m.s)
		Phase 1 Prewire (h.m.s)	Phase 2 Trim (h.m.s)	Phase 3 Final (h.m.s)	
1 - Installation	\$60.00	3:18:00	1:50:00	0:00:00	5:08:00

Labor Note:

Please stay within field border

Convert Dollar Amounts to Labor Time Utility
AutoSet Install Time ... based on Dollar Amounts

1. Add a Labor Type above
2. Enter Dollar Amounts to the right
3. Click the Set Install Time buttons

\$180.00 \$100.00

DOD 10% 10% 10%

Amount with DOD \$198.00 \$110.00 \$308.00

Set Phase 1 Install Time Set Phase 2 Install Time Set Phase 3 Install Time Set All Phases Install Time

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.

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
Proposal: 1282.1-1.100 Jan 29, 2013 Areas & Products Page: 1 Initials ____

Areas & Products Report - "Formatting"

☒ Yes ☐ No Page Break after each Area

☐ Products - Do not Sort products by Discipline

☐ Products - Show Product Install Location

☐ Hide Area Text

☐ Show Area Text - No Products

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

☒ Hide Footer Initials

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
Proposal: 1282.1-1.100 Jan 29, 2013 Areas & Products Page: 1

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.

Reset Rates to Master Prefs

Proposal - Labor Rates

Dr. Hawn
Chippewa Valley Eye Clinic
Home Entertainment System
1273.1-1.100

Done

Pricing Labor Commissions

Tax Summary Product Tax Fees Tax

Labor Summary

Hourly Labor Rate Selector		Labor Categories		Proposal Labor Rates	
			Sell	Cost	
Blank = Default 1		1 - Installation	60.00	30.00	
1 Basic Rate		2 - Programming	80.00	40.00	
2 Inner City Rate		3 - Training	100.00	50.00	
3 Prewire only		4 - Parts Labor	60.00	30.00	
4		5 - Wire Labor - Bulk	60.00	35.00	
5		6 - Wire Labor - Precut	60.00	40.00	

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

Default Labor Time

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

h:m:s

Parts Time - per each 1:00:00

Bulk Wire Time - per foot 0:10:00

Pre Cut Wire Time - per pair 0:30:00

Reset after changing Install Time

Reset Parts

Reset Bulk Wire

Reset Pre Cut Wire

To change the labor time for this proposal: Change the Master Prefs Labor Time, then Update the Product library and then Repick products. This is because the Labor Time used when picking products comes from the default labor time on the products themselves.

Labor Meter

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

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

Labor Percentage of Equipment %

Labor Meter

Enhancement – Proposal/Project: Pricing Screen Printer Setup button

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

Client Mode

Proposal - Pricing

Printer Setup Print ? Home

Dr. Hawn
Chippewa Valley Eye Clinic
Home Entertainment System
1273.1-1.100

Done

Pricing Labor Rates Commissions

Tax Summary Product Tax Fees Tax

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	\$44,781.91	34.6%	\$29,297.40	\$15,484.51		
Installation	\$4,390.83	46.4%	\$2,354.79	\$2,036.04		
Misc. Parts	\$1,448.33	40.3%	\$864.00	\$584.33		
Wire & Cable	\$8,432.90	43.5%	\$4,760.94	\$3,671.96		
Additional Fees	\$3,363.81	50.0%	\$1,681.90	\$1,681.90		
Total	\$62,417.78	37.6%	\$38,959.04	\$23,458.75		
Tax						
Grand Total	\$62,417.78					

\$86,946.78 List Price

-\$4,528.98 Courtesy Discount

\$62,417.78 Total (Tax not included)

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.

Super View		Area Sum		Prod Sum		Proposal - Products				Client Mode <input type="checkbox"/>							
						Mike & Jessica Potter				Phantom = <input type="checkbox"/>		Update All Products		Auto Price Adjuster		Done	
Areas		Text		Products		Security System 1282.1-1.100				Install Location Notes		Switch Many Products		Delete All Options		Product Total \$45,819.90	
Labor		Parts		Wire						Tasks		Show All					
No Discount		Exclude \$		View Switch Product		Qty Option		Change Group		Zone - Area Discipline Phase		Make Category Type		All 14 Products Model Description		Product Labor Parts Labor Unit List Adjusted Unit Sell Extended Sell Ext Installed	

Discipline		Area		Phase		Proposal - Detail by Area			Q View		Utility		Home		
Client		Areas		Prefs		Eileen Back			Pricing		Purchasing		Leave		
Project		Info		Products		Home Entertainment System			Payments		Work Orders		Change Orders		
Contact		Log		Supplements		1306.1-2.101			Master Tracker		Invoicing		Print Menu		
Client Mode		Wire Manager		Super View					Labor Meter		Labor Total		Grand Total		
Discipline		Category		Type		Make : Model			Description		Area Totals				
Home Entertainment System															
Atrium														29,870.95	
Audio : Multi-room : Keypad		1 ea		Linn : 5101 Personal Handset		Universal learning remote : Black				390.00					
Audio : Amplifier : Multi-channel		1 ea		Linn : 5125		Five channel power amplifier (Black) :				2,750.00					

Printer Setup		PDF reDirect		Proposal - Print Menu		Refresh Reports		Home	
hp LaserJet 1320 PCL 5,winspool,Ne04:		Eileen Back		Done					
Home Entertainment System		1306.1-2.101		Send Email		Preferences		Print Options	
Proposals		Shop		Custom		<input type="checkbox"/> Client <input type="checkbox"/> Manager <input type="checkbox"/> Salesman <input type="checkbox"/> Engineer			
Main Proposal		Proposal Summaries		Master Proposal & Supplements		Products, Parts, Wire & Labor			
Print All Sections		User Print Cue Sound Components		Print All		Discipline		Area	

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.

Reset to Master Prefs		Spell		Proposal/Preferences - Contract			Print Contract		Home			
Cover Page		Fees		Contract		Tom Burke			Done			
Client Intro		Terms		Sunbelt Business Brokers			Headers 11 Point Text			Preliminary Contract Disclaimer		
Shop Intro		Extra Pages		Home Theater System			Fields 10 Point Text					
		Pricing		1274.1-1.100			Please stay within field borders					
							Remove blank lines after your Text					
Header		System Contract						Merge Text				
Contract 1 Name		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.			Copy and paste text strings into your Contract text. Please include << >>				
Contract 1 (default)												

Contract 5 Name	Description
Contract 5	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 will always be consulted before any unanticipated drywall cuts are made. EME Audio & Video is not responsible for painting of exposed wiring or conduit. EME Audio & Video is not responsible for re-stretching of carpet.
	Special Order Products
	All special order items must be paid for in full before they are ordered. Any items specially ordered are non-returnable and non-refundable.
	System Design

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.

Module/Screen Access

- ☒ Preferences
- ☒ Project Manager
- ☒ Module Utilities
- ☒ Proposal & Project Admin Utility
- ☐ Proposal & Project Commissions
- ☒ Proposal Custom Print Layouts
- ☒ CPS Custom Proposal System access
- ☐ Do not allow SCPS access
Allow only CPS access

Client Mode ☐ **Master Project - Pricing - View** Refresh Print ? Home

Mike & Jessica Potter

Home Theater System
1285.1-1.100

Done

Pricing	Labor Rates	Commissions
Tax Summary	Product Tax	Fees Tax

Excluded Products Totals
Labor Meter

Equipment \$22,900
Installation \$99
Misc. Parts \$20
Wire & Cable \$3,041.20

Original Price \$1,312.50
Discounted Price \$4,353.70
Discount 42.1%
Net Price \$2,522.22

Total Labor Time 26:12:30
Profit \$9,359.55
Discount -\$100.00
Net Profit \$865.62
Net Profit \$517.00
Net Profit \$1,831.48

Message

Your Access Rights do not allow you to modify Commissions. Would you like to View the Commissions?

No OK

Sales Commissions - View Only Print ?

Eileen Back

Home Entertainment System
1306.1-2.101

Commissions for:
Sandy Engandela
Office Manager

Commission Amount
Equipment \$874.34
Installation \$72.93
Misc. Parts \$27.36
Wire & Cable \$76.42
Additional Fees \$33.32
Total Commission \$1,084.37

Split Commissions

Proposal Salesman: Sandy Engandela \$1,084.37
Split Commission with: \$0.00

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.



Clean all Project Change Orders from the Project List

This Utility will clean all of the Change Orders showing in the Project List. These Change Orders will not be deleted, but they will be moved 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	Home Entertainment System				
Tax Summary	Product Tax	Fees Tax	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 Discounted Orphaned Products

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

Product Set Library - Product Subsets 2 of 4

AV Sytem - Linn Classik - Good
Classik - DVD - 5 Unik speakers & Afekt subwoofer
 Product must exist in Product Library to become a Subset

Indicates an Item in a Set no longer exists or is Hidden or Discounted in the Product Library

Set Name: AV Sytem - Linn Classik - Good Fav: ☐

Set Description: Classik - DVD - 5 Unik speakers & Afekt subwoofer

Product Subsets *Does not show Hidden Products*

Class: Product Make: Linn Model: Add Subset

Qty	Make : Model	Group & Description	Unit Sell	Total Sell
1				
1 ea	Linn : Classik Movie Di-B	Audio : Amplifier : Surround Receiver Integrated multi-channel DVD-CD	\$3,995.00	\$3,995.00
1 ea	Linn : Classik Speaker Package	Audio : Speaker : 5.1 System Complete 5 speaker surround system	\$2,250.00	\$2,250.00
1 ea	Linn : Knekt RCU	Automation : Control : Keypad Knekt room control unit	\$750.00	\$750.00

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.

Product Library - Group Labor Supplements 6 of 56

Linn
5103 System Controller
 Linn 5103 Inc DTS, no RF demodulator (Black)
 Audio : Amplifier : Surround Processor

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

Group Assigned Labor ☐ Do not use Group Labor

Audio : Amplifier : Surround Processor
 Classification: Product
 Primary Install Phase: 3 Final

Labor Categories	Default Labor Rate	Group Labor Time (hrs.min:sec)		
		Phase 1 Prewire	Phase 2 Trim	Phase 3 Final
1 - Installation	\$60.00	0:00:00	0:00:00	1:00:00
2 - Programming	\$80.00	0:00:00	0:00:00	2:00:00
<div>Engage Manual Labor Override</div> <div>Apply DOD 2 Avg 10%</div> <div>Apply DOD 3 Avg 50%</div>				
Total		Total Labor Time	Total Labor Amount	
		0:00:00 0:00:00 3:00:00 =	\$220.00 =	3:00:00 hrs.min:sec Amount

Default Labor

Labor Categories	Hourly Rate	Labor Time (hrs.min:sec)
4 - Parts Labor	\$50.00	0:15:00 Parts per Each
5 - Wire Labor - Bulk	\$60.00	0:00:30 Bulk per Foot
6 - Wire Labor - Precut	\$60.00	5:00:00 Precut per Pair

Product Library - Product Labor Notes

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.

Product Library - Line List

AlphaFinder Show Makes

Find Products Fav A B C Show Hidden

Phan Part New Product

Lab Wire Inventory Control

Detail List

Print Menu

56 Items 58 Total

Leave

Product Sets

Utility

Recent Products

EME audio & video

Show Products Show All

Part Phantom Hidden All Supps

Bulk PreCut Discontinued

Show All Groups

Displin	Cat	Type	Class View	Make	Model : SKU	Description	Finish	Sell Price	Cue	Auto Tag
Audio	Speak	Center Channel		Klipsch	RC-35	Center Channel	Black	662.00 ea		
Audio	Speak	Floor		Klipsch	RF-35 (6483)	Reference Tower	Black	862.00 ea		
Audio	Speak	Bookshelf		Klipsch	RS-7	Reference Surround	Matte	713.00 ea		
Audio	Speak	Powered		Klipsch	RSW-10	Reference Subwoofer	Black	1,543.75 ea		
Audio	Multi	Ke					Black	3,650.00 ea		
Audio	Ampli	Su						8,438.00 ea		
Audio	Speak	Or					White	556.25 ea		
Audio	Ampli	Mu					Silver	3,310.00 ea		
Audio	Ampli	Pr					Silver	8,510.00 ea		
Audio	Speak	Po					Black	5,493.75 ea		
Audio	Misc	Fi						267.50 ea		
Wire	Pre-C	Int					Black	125.00 pr		
Audio	Speak	Pat						52.50 pr		

Message

Check this to show the Installed Sell Price (i).

This setting will not be retained when you leave the Product Library.

OK

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.

Product Library - Pix

1 of 448

Home

Search Web for Pix

Other Pix Views

AV iQ Product Info Website

Open Web Browser

Copy to Clipboard

Done

Prev

Next

Product

Specs

Pix

PDF

Labor

Parts

Wire

Tasks

catalogs.infocommiq.com/AVCat/CTL1642/index.cfm

Follow Us: Facebook Twitter LinkedIn YouTube

North America

AV-iQ

powered by infoComm INTERNATIONAL

My iQ Login | Registration

AV Equipment, Providers Directory & Industry Resource Center

Powered by InfoComm International, AV-iQ offers the most comprehensive pro-AV resource in North America. Explore audio visual equipment catalogs featuring the brand-new product data comparison tool & BIM library. Get exclusive access with My iQ & sign up for product news & more. Locate local service providers with the AV Services Directory & the upcoming Unified Communications directory & check out the case studies library.

Change Regions

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"

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



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.

Reset to Master Prefs			Spell			Proposal Preferences - Cover Page			? Home	
Cover Page	Fees	Contracts	Hayes Callahan						Custom Report	
Client Intro		Terms	Home Entertainment System						Bullet Points	
Shop Intro	Extra Pages	Pricing	1283.1-1.100						& Shop Text	
Shop Tag Line >			<input type="text" value="The Quality Name in Sound and Service"/>							

Proposal/Preferences - Shop Text

Hayes Callahan

Done
with update

Home Entertainment System
1283.1-1.100

Bullets
Shop Text

Optional Shop Text

This text appears on the last page of the Proposal Shop Report
Please stay within field borders

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

Home THX Program Overview

In 1985, THX Ltd. began researching the reproduction of movie soundtracks in the home. Hollywood had announced that more people were watching movies on video than in movie theatres. Was it possible to get the same experience at home? THX engineers assembled a high performance home theatre sound consisting of matched high-end speakers, a Dolby Pro Logic decoder, high powered amplifiers, and a laser disc player. They listened to familiar soundtracks on the system and compared the quality of that sound to the mixing theatres. To their surprise, the home system sounded very different.

Initial proposal for Hayes Callahan

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

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

BANG & OLUFSEN



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									
All Areas									
Labor Supplements									
Labor assigned to		Qty		Make : Model		Labor Type		Sort	
Zone - Area						Install Phases	Tax A B	Hourly Rate	Total Time with DOD (h:m:s)
1 - Home Theater		1	Linn	5101 Personal Handset		Programming	3 T T	\$80.00	0:30:00
1 - Home Theater		1	Linn	5101 Personal Handset		Calibration	3 T T	\$100.00	0:20:00
1 - Home Theater		1	Linn	5101 Personal Handset		Wire Labor - Bulk	1 T T	\$60.00	1:15:00
1 - Home Theater		1	Linn	5125		Installation	3 T T	\$60.00	1:00:00
1 - Home Theater		1	Linn	5125		Wire Labor - Precut	3 T T	\$60.00	0:20:00
1 - Home Theater		5	Linn	Katan		Installation	3 T T	\$60.00	1:40:00
Labor Total									70:22:30 \$4,390.83
Parts Supplements									
Parts assigned to		Qty		Make : Model		Parts Qty		Parts Make : Model	
Zone - Area						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.

