



SmartPartner Software
2014 Entire Year
New Features, Enhancements and Fixes

Hello SmartPartners,

Our commitment to continual improvement brings the SmartPartner Software another step closer to perfection.

We encourage you to upgrade now and read the Current Revision Document to take advantage of the new features.

View the SCPS Yearly Revision History

http://www.horizon-software.com/download/SCPS_Revisions_2014.pdf

http://www.horizon-software.com/download/SCPS_Revisions_2013.pdf

http://www.horizon-software.com/download/SCPS_Revisions_2012.pdf

http://www.horizon-software.com/download/SCPS_Revisions_2011.pdf

http://www.horizon-software.com/download/SCPS_Revisions_2010.pdf

http://www.horizon-software.com/download/SCPS_Revisions_2009.pdf

http://www.horizon-software.com/download/SCPS_Revisions_2008.pdf

http://www.horizon-software.com/download/SCPS_Revisions_2007.pdf

http://www.horizon-software.com/download/SCPS_Revisions_2006.pdf

http://www.horizon-software.com/download/SCPS_Revisions_2005.pdf

http://www.horizon-software.com/download/SCPS_Revisions_2004.pdf

http://www.horizon-software.com/download/SCPS_Revisions_2003.pdf

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SCPS 11.6v2 Upgrade

New Features, Enhancements and Fixes

12-31-2014

Fix – Proposal/Pricing/Labor: Enable Labor Screen Access

Access to the Proposal Labor screen is has now been fixed.

The screenshot shows the FileMaker Pro interface. At the top, the title bar reads "FileMaker Pro - [Main.fp!]. Below the title bar is a navigation bar with buttons for "Utilities", "Home", "Pricing", "Invoicing", and "Leave". Two red arrows point to the "Pricing" and "Invoicing" buttons. Below the navigation bar is a script definition window titled "Script Definition for '\$postProp.discountableEqTot'". The script contains the following steps:

- ◆ If ["pref~one::zf.propTotalsPostingMessage"]
- ◆ Show Message ["\$postProp.discountableEqTot"]
- ◆ End If
- ◆ Set Field ["zxi.sbt1.sell.noDisct", "mLine~mProp::zs.pd.sellAdjExtOptNoDisct"]
- ◆ If ["0"]
- ◆ Pause/Resume Script ["0:00:01"]
- ◆ Exit Record/Request
- ◆ End If
- ◆ Set Field ["zxi.sbt1.sell.noDisct", "mLine~mProp::zs.pd.sellAdjExtOptNoDisct"]
- ◆ If ["0"]

A red arrow points to the "Show Message" step in the script definition.

Script Definition for "nav.propPrice"

main

"nav.propPrice"



```
◆ End If
◆ If ["zc.coStatus = 'F'"]
◆   Go to Layout ["projFinCO Pricing"]
◆   Set Field ["pref~one::zxn.layNumPrint.g", "Status( CurrentLayoutNumber)"]
◆   Halt Script
◆ Else
◆   Clear ["zxi.sbt1.sell.noDisc't"]
◆   Go to Field [Select/per..., "zc.curserNav"]
◆   Go to Layout [Ref... window, "propPricing"]
◆   Set Field ["pref~one::zxn.layNumPrint.g", "Status( CurrentLayoutNumber)"]
◆ If ["0"]
◆   Pause/Resume Script ["0:00:05"]
◆ End If
◆ Exit Record/Request
◆ Halt Script
◆ End If
◆ Set Field ["pref~one::zxn.layNumPrint.g", "Status( CurrentLayoutNumber)"]
◆ End If
```



Options

SCPS 11.6v1 Upgrade
New Features, Enhancements and Fixes
12-21-2014

- **Enhancement: Project and Final Change Orders:** Improve Admin Edit Functions
- **Enhancement: Master Prefs/Lists:** Pop Up Value Lists for Proposal Subtotals
- **Enhancement: POS/All Invoices:** Auto Paste POS Number Name into PDF's
- **Enhancement: Contacts/Print Menu:** Export Email address for All Contacts
- **Enhancement: Contacts/Print Menu/Pick Contacts:** Option to Tag All or Selected Contacts
- **Enhancement: Project Manager and Project List:** Show All Change Orders
- **Enhancement: Product Library/Utility Lists:** Price Detail, Value List and Entity screens
- **Enhancement: Proposal & Project Work Order Install Notes:** Redesign this screen for better clarity.
- **Enhancement: Final CO/Utility/Admin:** CO Title & Number option
- **Enhancement: Final CO/Utility/Admin:** Delete Change Order
- **Enhancement: Project/Change Order List screens:** Sort by CO number
- **Enhancement: POS/Project Service Ticket:** Auto Enter Tracker Appointment Date and Time
- **Enhancement: Proposal/Print Menu:** Eagle Sentry Print Cues
- **Enhancement: Proposal/Print Menu:** Cutting Edge Print Cues
- **Fix: Proposals/Print Menu/Product Summary with Prices Report:** Show Ext Price
- **Fix: Proposals/Products:** Changing Product Qty retains List View
- **Fix: Proposals/Print Menu/Contact:** Remove coma from Contract Signature
- **Fix: Log in and Logo screen:** Horizon Screen: Revision List button

Enhancement: Project and Final Change Orders: Improve Admin Edit Functions

The ability for Administrators to Edit a Project or Final Change Order, instead of Converting it back to a Proposal is proving to be a valuable feature.

This second generation of this feature builds upon the Editing Features and Functions for enhanced and smoother usage.

Each screen that you can Edit will display the red "Project Edit" message, so that you know you are in the Edit mode.

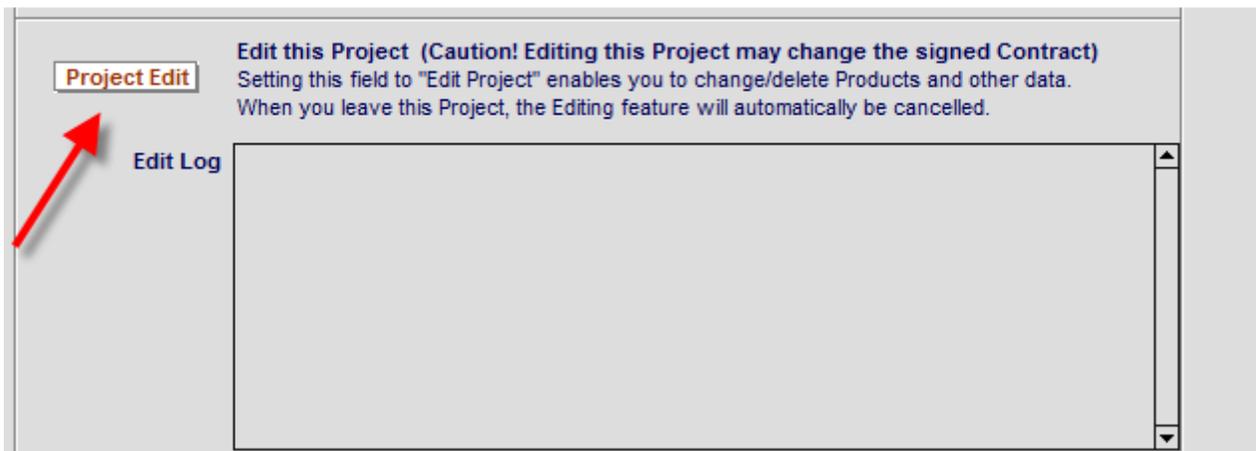
When you leave the Project or Final Change Order the Edit mode is automatically turned off and the message is removed.

Discipline	Area	Phase	Project - Detail by Area			Utilities	?	Home
Client	Areas	Overviews	Mike & Jessica Potter			Pricing	Invoicing	Leave
Project	Info	Products	Home Theater System			Payments	Purchasing	Tracker
Contact	Log	Supplements	1272.2-1.100			Project Fees	Work Orders	Print Menu
Client Mode <input type="checkbox"/>	Labor Details	Super Views	Project Edit			Wire Manager	Change Orders	Grand Total
Discipline : Category : Type		CO Status	Qty	Make : Model	Description	Area & Product Totals		
Home Theater System								
Zone 1 - Home Theater								27,146.98
Audio : Amplifier : Multi-channel			1 ea	Linn : 5125	Five channel power amplifier (Black) :	2,750.00		
Audio : Speaker : Bookshelf			5 pr	Linn : Katan	Bookshelf loudspeakers: pair : Black	4,975.00		
Audio : Speaker : Powered Subwoofer			1 ea	Linn : Melodik	Active isobarik bass extension	4,950.00		

Project Edit

Edit this Project (Caution! Editing this Project may change the signed Contract)
Setting this field to "Edit Project" enables you to change/delete Products and other data.
When you leave this Project, the Editing feature will automatically be cancelled.

Edit Log



Enhancement: Master Prefs/Lists: Pop Up Value Lists for Proposal Subtotals

The Pop Up value lists in Master Prefs/Proposal/Contracts screen can now be entered in the Master Prefs/Lists/Proposal screen and they will appear in the Contact Subtotals and be retained when you upgrade SCPS.



Populate these fields and they will appear in in the Pop up fields below.

Proposal Pricing - Subtotal Labels			
Header	Proposal Totals.....		No Tax Subtotal Total (Tax not included).....
	Products & Labor.....		
	Equipment & Installation.....		
	Electronics & Installation.....		
Prices quoted text	Prices quoted are good for.....	SubTotal Before Discount	Discount
	Product prices are good for.....	List Price:.....	Courtesy Discount.....
	Product prices are good (or.....	Original Price.....	System Discount.....
	guaranteed) for:.....	Before Discount.....	Professional.....
			Discount.....

Master Proposal Prefs - Contract Pricing Page				?	Home	
Cover Page	Text & Fees	Contracts	Proposal Print Options	<i>Headers 11 Point Text Fields 10 Point Text Please stay within field borders</i>		Done
Client Intro	Overviews	Terms				Preliminary Contract Disclaimer
Shop Intro	Extra Pages	Pricing				
Subtotal Labels						
Header		Electronics & Installation				
Show Number of Subtotals <input type="text" value="5 Subtotals"/>		Products <input type="text" value="Equipment"/> Labor <input type="text" value="Installation"/> Misc. Parts <input type="text" value="Misc. Parts"/> Wire & Cable <input type="text" value="Wire & Cable"/> Additional Fees <input type="text" value="Additional Fees"/>	<input type="text" value="No Tax Subtotal"/>			
5 Subtotals = All 5 separate Subtotals 3 Subtotals = 1 (Products), 2 (Wire + Parts), 3 (Labor + Fees) 2 Subtotals = 1 (Products + Wire + Parts), 2 (Labor + Fees) 1 Subtotal = Combines All and Shows only 1 Subtotal		Subtotal <input type="text" value="Total"/> Tax A <input type="text" value="PST Tax"/> Tax B <input type="text" value="GST Tax"/> Tax Total <input type="text" value="Tax"/> Grand Total <input type="text" value="Grand Total"/>	<input type="text" value="Total (Tax not included)"/>			
Price Expiry Notice						
<input type="checkbox"/> Do not show Price Expiry <input type="checkbox"/> Show Expiry without Date		Prices quoted are guaranteed for <input type="text" value="60"/> Days		Prices quoted text <input type="text"/>		
Discount Notice						
<input type="checkbox"/> Show Discount on Contract <input checked="" type="radio"/> Yes <input type="radio"/> No		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 Sell price and the original Sell Price.		Labels SubTotal Before Discount <input type="text" value="List Price"/> Discount <input type="text" value="Courtesy Discount"/> SubTotal After Discount <input type="text" value="Total"/>		
Extra Contract Message						
Message		<input type="text"/>				

Enhancement: POS/All Invoices: Auto Paste POS Number Name into PDF's

When printing any POS Invoice you will get a notice reminding you that you can now place your cursor in the File Name field and press Control & V and paste the POS Invoice number and Client Name.

You can suppress this notice in the Master Preferences/POS/POS1 screen.

Print Setup Delete Duplicate Add New POS - Quotation Sold

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

QUOTATION
QT #7195
3 of 19

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

Label Address 2: Show Hide

Cecilia Christenson Wade Realty
567 58TH Street Oakland, CA 94607
Home 808-262-2614 Work: 808-263-3313 Fax: 808-261-1074
Cecilia Christenson Wade Realty
4/25/2007

Message

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

OK

Sales Rep
Jim Engandela

Pick	Qty	unit		Install (h:m:s)	Unit Price	Ext Price	Tax
1	ea	Linn : Classik Music-B		0:30:00	1,550.00	1,550.00	T T
2	ea	Crestron : AADS : Ac		0:45:00	2,500.00	5,000.00	T T

Print Setup Delete Duplicate Add New POS - Quotation Sold

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

QUOTATION
QT #7195
3 of 19

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

Label Address 2: Show Hide

Cecilia Christenson Wade Realty
567 58TH Street Oakland, CA 94607
Home 808-262-2614 Work: 808-263-3313 Fax: 808-261-1074
Cecilia Christenson Wade Realty
4/25/2007

PDF reDirect Pro v2

Registered to: Jim Engandela Register Preferences Forum Help

Printer Output Settings

Picture Quality Good (Default)
Color Model Force all to RGB (Default)
Page Rotation Automatic (Default)
Add Web Links

Security

Encrypt PDF File
Password
Lock PDF File

Stamps

APPROVED.pdf
COMPLETED.pdf
CONFIDENTIAL - Yellow URH.txt
CONFIDENTIAL.pdf
CONFIDENTIAL-Text.txt

Attachments

PDF Information

Preview Pg 1/1

PDF Output Filenames v2.5.2

View in PDF Reader after saving
Filename QT #7195 Christenson, Ceclia - Wade Realty
View Style Window (Default) 100% Zoom (De)
Startup Page 1 Fast Web View

You can suppress this notice in the Master Preferences/POS/POS1 screen.

Master Prefs - POS Defaults

? Home

POS 1 POS 2 Alternate PS Ticket Done

POS Options

Override Sort Order Do Not Sort POS Lists screens

POS List screens Sort Order

Show Product Cue Notes when Picking Products into a POS Invoice

Show Print Dialog when Printing all POS Invoices

Hide Labor Matrix Detail when Printing all POS Invoices

Suppress "Copy File Name" Notice when Printing



Enhancement: Contacts/Print Menu: Export Email address for All Contacts

You can now export either All of the Contacts or only the ones you have selected (Picked) to a file that can be imported into Excel or other applications.

Find Contacts **Contacts - Print & Mail Merge** Printer Setup ? Home

Pick Contacts for Mail Merging **Contacts Picked 51** Pick the Contacts you want, then create your Letter or Fax. Done

Letter Library

Create Merged Letters, Faxes and Emails

Merged Letters View

Merged Faxes View

Merged Emails

Print Merged Envelopes or Labels

Contacts Picked 51

Envelopes View

Mailing Labels View

Mailing Label Tag Line

Do not exceed field size

Contact Reports

	View	Print	Export
Contact Line List			
Contact Line List 2			
Contact Line List 3 <i>Contact : Address : Email</i>			
Contact Full Detail			
Category List			
Phone List			
Address List			
Misc. Info List			
Follow-Up List			
Vendor Contacts with assigned Makes			
Export Email Address for All Contacts			
Export Email Address for Picked Contacts			



Enhancement: Contacts/Print Menu/Pick Contacts: Option to Tag All or Selected Contacts

When leaving the Find and Tag Contacts screen you now and choose to either Tag only the Contacts you have Selected (Picked) or All of the Contacts.



Enhancement: Project Manager and Project List: Show All Change Orders

Besides using the CO arrow to view CO's for a single Project, you can now View All CO's for All Projects. All CO's can be viewed from either the Project Manager and Project List screens.

The screenshot shows the 'Projects' interface. A red arrow points to the 'All Change Orders' option in the 'Access Levels' menu. The main table displays project details including Status, Dup, View, CO, Number, User, Client, Company, Project Title, Sold, Total, and Fav.

Status	Dup	View	CO	Number	User	Client	Company	Project Title	Sold	Total	Fav	
●	□	□	▶	1303.1-1.100	Engandela, Jim	Engandela, Jim	Home Entertainment			\$2,811	□	□
●	□	□	▶	1298.1-1.100	Asher, LeRoy	Asher, LeRoy	Home Entertainment	7/2/2014		\$42,170	□	□
●	□	□	▶	1297.1-1.100	Asher, LeRoy	Asher, LeRoy	Home Entertainment	6/30/2014		\$50,033	□	□

Global Project Manager

Sunday
December 12, 2014

? Home
Done



Project Costing

Project Job Costing Project Payments






Project Install Trackers

Percent of Completion Installation Progress Install Gantt Chart








Project Invoices

Change Orders Purchase Orders Work Orders Sales Invoices








Use these buttons to Find All CO's, All Finalized CO's, or only Pending CO's.

Use the Sort Arrow to change the Sort Order of all of the Underlined columned header names from Ascending to Descending order.

View	Entity	Number	User	CO Status	Finalized	Client	Company	CO Total	Balance Due
	Project	1272.1c1-1.100		Pending		Potter, Mike & Jessica			
	Completed	1273.1c2-1.100		Pending		Hawn, Dr.	Chippewa Valley Eye Clinic	\$4,059.56	
	Completed	1273.1c1-1.100		Final	8/9/2011	Hawn, Dr.	Chippewa Valley Eye Clinic	-\$763.57	-\$763.57
	Project	1284.1c3-1.100		Final	4/25/2007	Smith, John & Mary		-\$1,427.78	-\$1,463.77
	Project	1284.1c2-1.100		Final	9/12/2006	Smith, John & Mary		\$26,492.37	\$25,602.37
	Project	1284.1c1-1.100		Final	11/28/2014	Smith, John & Mary		\$13,805.86	\$13,805.86
	Project	1285.1c2-1.100		Pending		Potter, Mike & Jessica		\$2,811.33	
	Project	1285.1c1-1.100		Pending		Potter, Mike & Jessica		\$0.00	
	Project	1298.1c2-1.100		Final	7/2/2014	Asher, LeRoy		\$14,056.63	\$14,056.63
	Project	1298.1c1-1.100		Final	7/2/2014	Asher, LeRoy		\$14,056.63	\$17.00
	Project	1303.1c2-1.100		Pending		Engandela, Jim			
	Project	1303.1c1-1.100		Pending		Engandela, Jim			

Enhancement: Product Library/Utility Lists: Price Detail, Value List and Entity screens

The Product Library Utility List screens are now all consolidated. Go to them by clicking on the Utility Lists button from the either the Product Library Line or Detail screens.

Product Library - Line List

AlphaFinder Show Makes ? Home

Show Products
 Hidden Products
 Utilities
 Detail List
 Leave

Part Phantom
 All Suppliments
 Lab Wire
 Product Sets

Bulk PreCut
 Discontinued Products
 Utility Lists
 New Product
 Inventory Control
 Print Menu

448 Items
451 Total

Show All Groups

Displin	Cat	Type	Class	View	Make	Model : SKU	Description	Finish	Sell Price	Cue	Auto Tag
Audio	Ampli	Stereo Receiver	Product	Yamaha	RX-396	Stereo Receiver	Black	299.00 ea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Audio	Ampli	Stereo Receiver	Product	Yamaha	RX-496	Stereo Receiver		349.00 ea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Audio	Ampli	Stereo Receiver	Product	Yamaha	RX-596	Stereo Receiver		449.00 ea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Video	Displ	DLP Video Projec	Product	Yamaha	DPX-1000	DLP Projection System		5,999.00 ea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Select either the Prices, Value Lists or Entities screens. You can also Assign Product Groups to Many Products from this screen.

Product - Utility Lists - Prices

AlphaFind: Make Hidden ? Home

448 of 451 Done

Show Products
 Hidden
 Show All
 Sort by Dates
 Replace Data

Part Phantom
 Discontinued
 Prices
 Value Lists
 Entities
 Assign Groups to Many Products

All Product Groups Discontinued

Dept	Cat	Type	View	Class	Make : Model : Description	Finish	Fav Hide
Audio	Ampli	Stereo Receiver	Product	Yamaha : RX-396 : Stereo Receiver	Black	<input type="checkbox"/>	<input type="checkbox"/>
Product Created: 10/30/2001		List	Adjustment Type	%	Loaded Price		
Sell Price Updated: 8/8/2011		Unit ea	Sell	\$299.00		Sell	\$299.00 39.5% GP
Cost Price Updated: 8/8/2011		Minimum Sell	Min GP	%	\$	Cost	\$181.00
		Cost	\$181.00				
Audio	Ampli	Stereo Receiver	Product	Yamaha : RX-496 : Stereo Receiver		<input type="checkbox"/>	<input type="checkbox"/>
Product Created: 10/30/2001		List	Adjustment Type	%	Loaded Price		
Sell Price Updated: 8/8/2011		Unit ea	Sell	\$349.00		Sell	\$349.00 39.5% GP
Cost Price Updated: 8/8/2011		Minimum Sell	Min GP	%	\$	Cost	\$211.00
		Cost	\$211.00				
Audio	Ampli	Stereo Receiver	Product	Yamaha : RX-596 : Stereo Receiver		<input type="checkbox"/>	<input type="checkbox"/>
Product Created: 10/30/2001		List	Adjustment Type	%	Loaded Price		
Sell Price Updated: 8/8/2011		Unit ea	Sell	\$449.00		Sell	\$449.00 39.9% GP
Cost Price Updated: 8/8/2011		Minimum Sell	Min GP	%	\$	Cost	\$270.00
		Cost	\$270.00				

Find Products		Fav A		B	C	Product - Utility Lists - Value Lists																				AlphaFind: Make	Hidden	?		Home
All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z				
Show Products	Hidden		All Supps		Show All	Replace Data																				448 of 451	Done			
Part	Phantom		Discontinued																											
Bulk	PreCut		Prices		Value Lists		Entities																							
Find Duplicate Keys		Key	Make	Model	Unit	Make ID	Type ID	Alternate PO	Vendor ?	Purchasing Lead Days	Tax A	Tax B	Fav	Place																
<input checked="" type="radio"/>	298	Yamaha	RX-396	ea						5	T																			
<input checked="" type="radio"/>	749	Yamaha	RX-496	ea																										
<input checked="" type="radio"/>	750	Yamaha	RX-596	ea						5	T																			
<input checked="" type="radio"/>	798	Yamaha	DPX-1000	ea						15	T																			
<input checked="" type="radio"/>	799	Yamaha	RAV-2000	ea						5	T																			
<input checked="" type="radio"/>	803	Yamaha	RX-777	ea						5	T																			
<input checked="" type="radio"/>	2592	Linn	Akito	ea						7	T	T		m																
<input checked="" type="radio"/>	2612	Linn	5125	ea						7	T	T	A	m																
<input checked="" type="radio"/>	2615	Linn	LK 140	ea						7	T	T		m																
<input checked="" type="radio"/>	2621	Linn	Melodik	ea						7	T	T		m																

Find Products		Fav A		B	C	Product - Utility Lists - Value Lists																				AlphaFind: Make	Hidden	?		Home
All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z				
Show Products	Hidden		All Supps		Show All	Replace Data																				448 of 451	Done			
Part	Phantom		Discontinued																											
Bulk	PreCut		Prices		Value Lists		Entities																							
Find Duplicate Keys		Key	Make	Model	Unit	Make ID	Type ID	Alternate PO	Vendor ?	Purchasing Lead Days	Tax A	Tax B	Fav	Place																
<input checked="" type="radio"/>	298	Yamaha	RX-396	ea						5	T																			
<input checked="" type="radio"/>	749	Yamaha	RX-496	ea																										
<input checked="" type="radio"/>	750	Yamaha	RX-596	ea						5	T																			
<input checked="" type="radio"/>	798	Yamaha	DPX-1000	ea						15	T																			
<input checked="" type="radio"/>	799	Yamaha	RAV-2000	ea						5	T																			
<input checked="" type="radio"/>	803	Yamaha	RX-777	ea						5	T																			
<input checked="" type="radio"/>	2592	Linn	Akito	ea						7	T	T		m																
<input checked="" type="radio"/>	2612	Linn	5125	ea						7	T	T	A	m																
<input checked="" type="radio"/>	2615	Linn	LK 140	ea						7	T	T		m																
<input checked="" type="radio"/>	2621	Linn	Melodik	ea						7	T	T		m																

Enhancement: Final CO/Utility/Admin: CO Title & Number option

Administrators can now go into the Final Change Order/Utility/Admin screen and modify the CO Title or CO number.

1297	Final Change Order Utility - Administration	?
John & Mary Smith		
Commercial Security System 1284.1c17-1.100		
Done		

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

1 Title

Final Change Order Lock Out

Lockout All Users Except this User
If the Master User Lockout checkbox is marked in Master Prefs/Other/Misc 2, and a User is entered into this User field, then only this User will be able to enter this Proposal.

User Name
Title

Click the Clear icon to remove the user name.

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.

Edit this Final Change Order (Caution! Editing this CO may change the signed Contract)
Setting this field to "Project Edit " enables you to change/delete Products and other data. When you leave this CO, the Editing feature will automatically be cancelled.

Edit Log

2 **Change CO Number**
Caution: Be carefull not to change the CO number to a CO number that already exists for this Master Project.

3 **Delete Final Change Order**
Caution: Deleting this Change Order cannot be undone.

Enhancement: Final CO/Utility/Admin: Delete Change Order

Administrators can now go into the Final Change Order/Utility/Admin screen and Delete that specific Final Change Order.

3

Delete Final Change Order

Caution: Deleting this Change Order cannot be undone.

Enhancement: Project/Change Order List screens: Sort by CO number

The Change Orders are now sorted by Project number and the CO number, even if the CO number has 2 or more digits.

View	Entity	Number	User	CO Status	Finalized	Client	Company	CO Total	Balance Due
	Project	1272.1c1-1.100		Pending		Potter, Mike & Jessica		\$0.00	
	Project	1273.1c1-1.100		Final	8/9/2011	Hawn, Dr.	Chippewa Valley Eye Clinic	-\$763.57	-\$763.57
	Project	1284.1c1-1.100		Pending		Smith, John & Mary		\$13,805.86	
	Project	1284.1c2-1.100		Final	9/12/2006	Smith, John & Mary		\$15,218.19	\$25,602.37
	Project	1284.1c3-1.100		Final	4/25/2007	Smith, John & Mary		-\$1,427.78	-\$1,463.77
	Project	1285.1c1-1.100		Pending		Potter, Mike & Jessica		\$0.00	
	Project	1298.1c1-1.100		Final	7/2/2014	Asher, LeRoy		\$14,056.63	\$17.00
	Project	1298.1c2-1.100		Final	7/2/2014	Asher, LeRoy		\$14,056.63	\$14,056.63
	Project	1303.1c1-1.100		Pending		Engandela, Jim		\$0.00	
	Project	1303.1c2-1.100		Pending		Engandela, Jim		\$0.00	

Enhancement: POS/Project Service Ticket: Auto Enter Tracker Appointment Date and Time

When creating a Tracker Appointment in a POS Project Service Ticket, the Date and Time of the Appointment will be automatically created if they have been entered into the Ticket Appointment. You have an option to do this, as well as to modify the time and date on the Tracker Appointment.

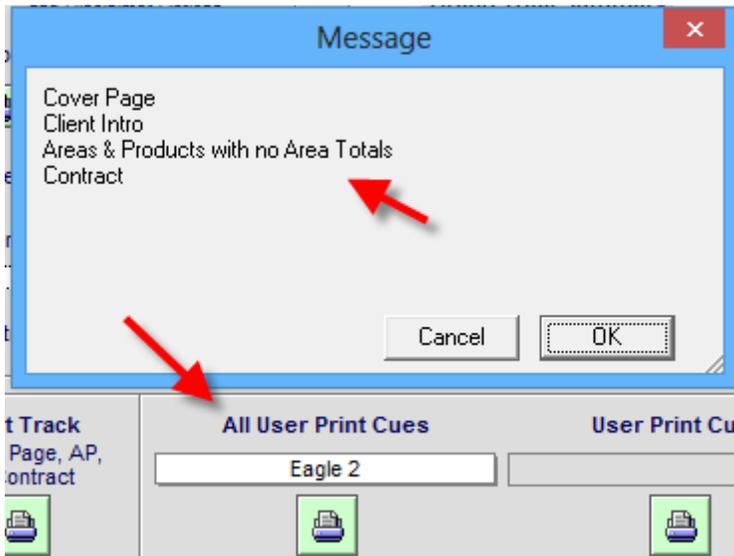
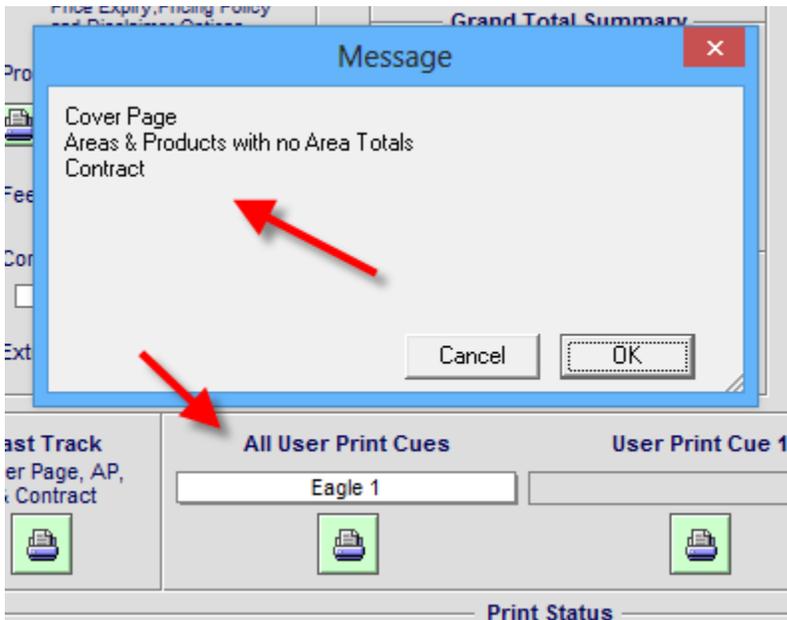
The screenshot displays a software interface for a "Project Ticket" (PST #7223). The interface includes a top navigation bar with options like "Print Setup", "Delete Ticket", and "Add New". Below this, there are sections for contact information (Dennis Goss), project details (Project # 1275.1-1.100), and appointment scheduling. A "Ticket Appointment" section shows a date of 12/24/2014 and a time of 8:30 AM. A "Message" dialog box is overlaid on the interface, asking: "This Ticket has an Appointment Date and Time. Do you want to use this Date and Time for the Tracker Appointment." The dialog has "No" and "Yes" buttons. A red arrow points from the "Ticket Appointment" date and time fields to the message dialog.

Enhancement: Proposal/Print Menu: Eagle Sentry Print Cues

Print Cues have been created based on User Specs

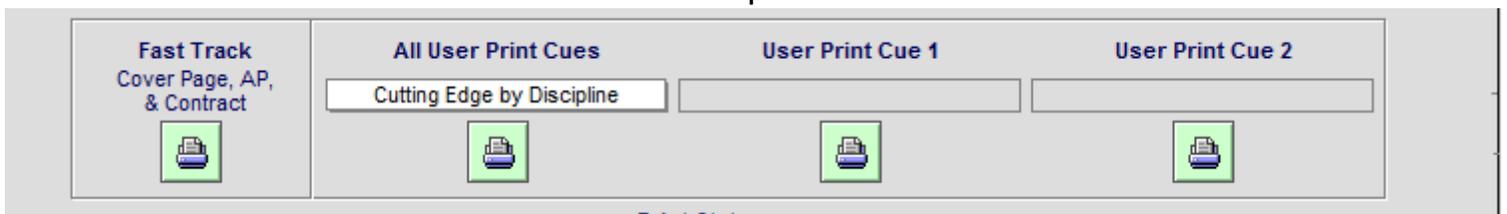
The screenshot shows a print menu interface with four buttons, each with a printer icon. The buttons are labeled: "Fast Track Cover Page, AP, & Contract", "All User Print Cues", "User Print Cue 1", and "User Print Cue 2". Below the "All User Print Cues" button, the text "Eagle 1" is visible. Below the other three buttons, there are empty input fields.

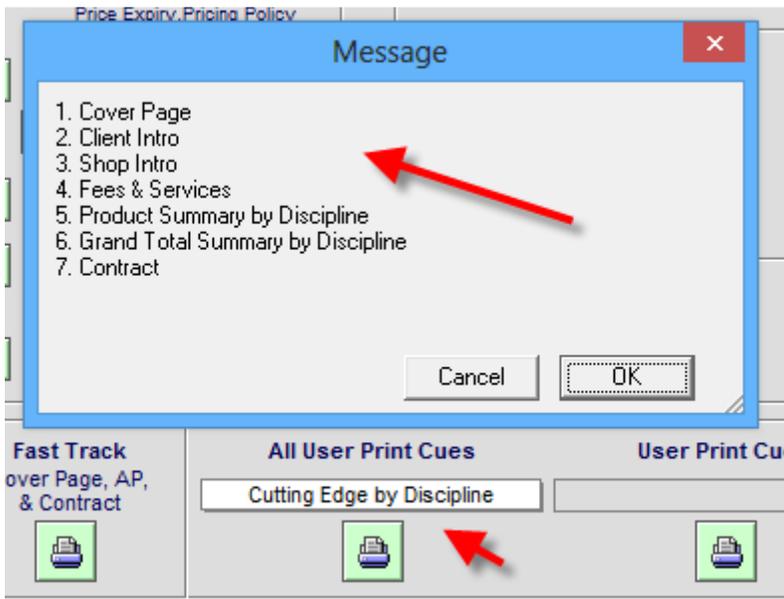
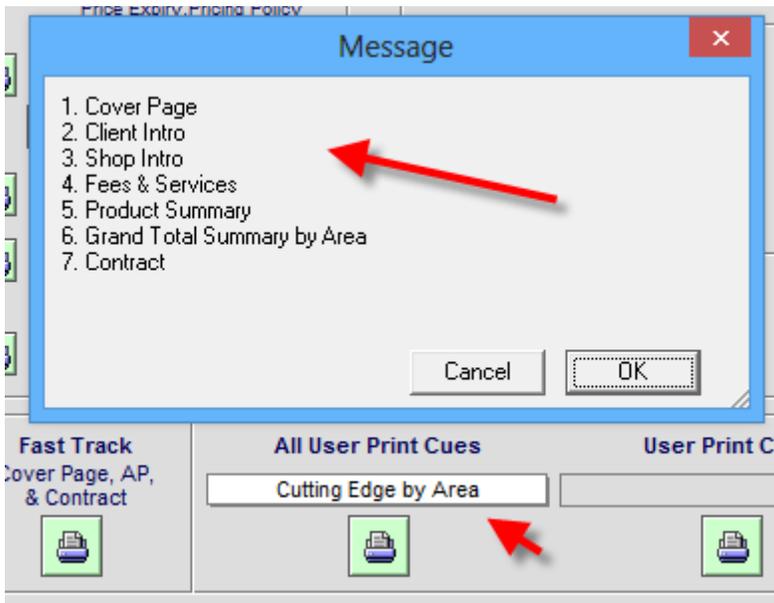
Print Cues have been created based on User Specs



Enhancement: Proposal/Print Menu: Cutting Edge Print Cues

Print Cues have been created based on User Specs





Fix: Proposals/Print Menu/Product Summary with Prices Report: Show Ext Price

Regardless of the Print Option Price settings (Hide Prices) the Product Summary with Prices Report now shows the Extended Price. Also fixed on the Custom Reports module 11.4v1.

Product Summary

Audio

2 ea Klipsch : RC-35 : Center Channel Speaker : Black Ash

Unit Price

Ext Price

\$3,995.00

\$7,990.00

This center channel has been engineered to deliver all the detail, subtleties and dynamics required for the ultimate home theater experience. It delivers detailed, subtle and thrilling sounds through dual 6.5-inch woofers and a 1-inch tweeter that has a light titanium-dome diaphragm and a high-energy, video-shielded Neodymium magnet. The tweeter is coupled to an exclusive Klipsch square Tractrix® Horn that



Fix - Proposals/Products: Changing Product Qty retains List View

When changing the Product Qty, the screen now stays in the List View, instead of reverting to Form view, which only shows 1 Product.

Super & Sum Views		Product Phases		<input type="checkbox"/> Clint Mode		Proposal - Products				Total \$8,380.00		Home		
Areas		Text		Products		Jim Engandela				Update All Products		Delete All Options		
Labor		Parts		Wire		Tasks		Show Tagged		Auto Price Adjuster		Update Tagged Products		
View		Option		Qty		Zone - Area		Make		All 2 Products		Product Labor		
Tag		No \$		Switch		Discipline		Category		Parts Labor		Unit List		
Del		No Disc		Product Group		Phase		Type		Description		Unit Cost		
										Hide Printed Price		Unit Sell		
										Wire Labor		Ext Sell		
										Updated		Ext Installed		
										GP%		Ext Discount		
				2	ea	Atrium		Klipsch	RC-35		100.00	399.00	3,995.00	7,990.00
						Audio		Speaker	Center Channel Speaker :			210.00	3,995.00	8,090.00
						3 Final	1312.1	Center Channel	Black Ash	<input type="checkbox"/>	164.40	8/8/2011	94.7%	7,192.00
				1	ea	Atrium		Linn	5101 Personal Handset		3,160.00		390.00	390.00
						Audio		Multi-room	Universal learning remote :		2,855.00	234.00	390.00	3,550.00
						2 Trim	1312.1	Keypad	Black	<input type="checkbox"/>	702.00	8/8/2011	40.0%	

Fix: Proposals/Print Menu/Contact: Remove coma from Contract Signature

In Master Prefs/Proposals/Contract Options you can enter an alternate name and title to show up on your Proposal Contracts. Some users enter something besides a name in the Alt Name field and a name in the Alt Title.

This is fine, but now the coma placed in the actual Contract signature will be in the right spot.

Alternate Signature

Use Alternate Contract Signature name, instead of Salesman's name.

This is a Global feature and affects all Proposals in SCPS. Custom Reports Users should upgrade to Reports 11.1v1

Alt Name	Alt Title
Athorized Signature	Fred Sturm

Please Authorize & Return

Date: _____
Karen & Andy Nelson or authorized signature on clients behalf

Date: _____
Athorized Signature, Fred Sturm

Fix: Log in and Logo screen: Horizon Screen: Revision List button

Clicking on the Horizon logo from the Log in or Logo screen, brings you to the Horizon Info screen.

Clicking on the Revision List button will open you Browser and open the SCPS Revision List pdf for the Current Revision and the Past Revisions.

Sunday
December 21, 2014

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



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Horizon
SmartPartner
Software License



Done

President/Developer
Jim Engandela

Office Manager
Sandy Engandela

Programming
Jim Engandela
Dave Dowling

Technical Support
Jim Engandela
Dave Dowling
Joel Roberts

Upgrade SCPS Software

Revision List
New Features
Enhancements & Fixes

Upgrade Guides

Download Upgrade

Educational Video



SCPS Overview

Send Email

Send to Horizon

Email Bug Report

Send to Horizon

Send Large Files

Send to Horizon

SCPS 11.5v1 Upgrade
New Features, Enhancements and Fixes
11-12-2014

- **Enhancement - Proposals/Print Menu:** User Print Cue 1 & 2 and screen Redesign
- **Enhancement - Master Project & Final Change Order/Utility/Admin:** Edit Functions
- **Enhancement - Proposals/Pricing/Product Taxes:** Labor Tax Flags
- **Enhancement - Product Library/Utilities/Export Products:** Include Product Labor
- **Enhancement - Task Manager:** Go Directly into Proposal-Project-Change Orders
- **Enhancement - Project/Payments/Payment Report:** Refine layout for better clarity
- **Enhancement - Proposal/Supplements:** Increase All Portals to 100 Records
- **Enhancement - Proposal/Labor Detail:** Add Labor Supplements with Phase Times
- **Enhancement - Project List:** Add "All Change Orders" button
- **Enhancement - Product Library/Product Detail:** Automatically display Default Vendor
- **Enhancement - Contacts/Contact Detail:** Client, Info and Map Text Block Redesign
- **Enhancement - Proposals/Projects:** Client, Project, Info screen and Text Block Redesign
- **Enhancement - Product Library/Find Products:** Redesign Find Products Screen
- **Fix: Project/Change Order:** Fix Totals Posting on CO List screen
- **Fix - Proposals/Print Menu:** Product Summary with Prices Report: Show Ext Price
- **Fix - Proposals/Products:** Changing Product Qty retains List View Status

Enhancement – Proposals/Print Menu: User Print Cue 1 & 2 and screen redesign

The Proposal Print Menu layout has been enhanced for better clarity.

User Print Cues enable SmartPartners to create Proposals that contain specific sections in the order they want them to print.

SmartPartners should contact Horizon Software if they want to create Custom User Print Cues for their company.

The Fast Track Print Cue, prints only the Cover Page, the Areas & Products section and the Contract.

The All User Print Cues can be changed in the Print Menu with the pop up list selection.

The User Print Cue 1 and 2 default uses can be set in the Master Preferences/Other/Proposals 1 screen.

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

PDF reDirect Pro v2,winspool,Ne01: **Jim Engandela**
Hoizon Software
Home Entertainment System
1313.1-1.100

Send Email Client Manager
 Salesman Engineer

Done Prefs Print Options

Proposals Projects Costing Purchasing

Main Proposal

Print All Sections

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 Sections

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

Proposal Supplements

Print All Sections

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

Master Proposal & Supplements

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

Fast Track
Cover Page, AP, & Contract

All User Print Cues

Cover-AP-Contract

User Print Cue 1

Cutting Edge by Area

User Print Cue 2

Cutting Edge by Discipline

Print Status

Shop Location: EME Audio & Video Systems Proposal Status

Contract: 1 - Contract 1 Report Date Date Lock

Product Listing Option: A1 Make-Model-Description-Finish Show "Cover Page & Contract" Watermark

Product & Supplement Pricing Option: Product : Ext Sell Show Print Dialog when printing

Area Subtotal Pricing Option: Show Area Totals Use Custom Proposal Layouts
Version SCPS 11.4v1

Subtotal Option: 5 Subtotals

Printer Name: PDF reDirect Pro v2,winspool,Ne01:

File Name: 1313.1-1.100 Jim Engandela Hoizon Software

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

Master Prefs - Other - Proposals 1						?	Home
Proposal 1	Projects 1	Products 1	Misc 1	3rd Party 1	Counter	FileMaker	Done
Proposal 2	Projects 2	Products 2	Misc 2	3rd Party 2	Graphics	Networking	

Entering Proposal/Project/Completed/Archive Lists

No Proposal "New or View" Prompt

Sort Proposals & Projects Descending = Highest to Lowest number
Ascending = Lowest to Highest number

Proposal & Project Sort Order

New Proposals - Contact Sort

Do Not Sort Contacts
to increase the speed of entering the Contact Module
when creating New Proposals.

Product Supplements

Labor Supplements Do not add Labor Supplements when picking products

Parts Supplements Do not add Parts Supplements when picking products

Wire Supplements Do not add Wire Supplements when picking products

Yes **Wire Itemization** (recommended)
 No

Task Supplements Do not add Task Supplements when picking products

Product Sets

Display Sets in Proposal (Under Development)

Proposal Printing

Show Print Dialog When printing Proposal Sections

PDF Printing Delay between sections seconds

Print Cue - All Users

Print Cue - Default 1

Print Cue - Default 2

Enhancement - Master Project & Final Change Order/Utility/Admin: Edit Functions

Instead of Converting a Master Project back into a Proposal, in order to make changes...Administrators can now put a Master Project or Final Change Order into the Edit Mode. This will enable Administrators to make changes to a Master Project just like it was a Proposal or Pending Change Order.

Remember that Master Project Contracts and Final Change Order Contracts usually have been signed by the Client, so use this Editing feature with caution.

After enabling the Edit Mode a red "Project Edit" label will appear on all of the screens you can Edit.

When you exit the Master Project or Final Change Order, the Edit Mode will automatically be turned off.

A Log keeps track of each time the Edit Mode has been enabled by an Administrator.

Discipline	Area	Phase	Master Project - Detail by Area			Utilities	?	Home
Client		Areas	John & Mary Smith			Pricing	Invoicing	Leave
Project	Info	Products	Home Entertainment System			Payments	Purchasing	Tracker
Contact	Log	Supplements	1284.1-1.100			Project Fees	Work Orders	Print Menu
Client Mode <input type="checkbox"/>	Labor Details	Super Views	QV			Wire Manager	Change Orders	Grand Total
Discipline : Category : Type		CO Status	Qty	Make : Model	Description	Area & Product Totals		
Home Entertainment System								
Zone 1 - Home Theater								42,855.73
Audio : Amplifier : Multi-channel			1 ea	Linn : 5125	Five channel power amplifier (Black) :	2,750.00		
Audio : Source : CD Player		A c2	1 ea	Linn : Classik Music-S	Integrated CD	1,550.00		
Audio : Speaker : Bookshelf			5 pr	Linn : Katan	Bookshelf loudspeakers: pair : Black	4,975.00		

Client Mode Hide <input type="checkbox"/>	Project Utility			?	Home
John & Mary Smith					
Home Entertainment System					
1284.1-1.100					
Project	Export	Admin			
 Complete this Project Convert this Project into a Completed Project					

Project Edit Edit this Project (Caution! Editing this Project may change the signed Contract)
 Setting this field to "Edit Project" enables you to change/delete Products and other data.
 When you leave this Project the Editing feature will automatically be cancelled.

Edit Log

10/31/2014	1284.1-1.100	User: Jim Engandela	100
10/31/2014	1284.1-1.100	User: Jim Engandela	100
10/31/2014	1284.1-1.100	User: Jim Engandela	100
10/31/2014	1284.1-1.100	User: Jim Engandela	100
10/31/2014	1284.1-1.100	User: Jim Engandela	100

Discipline	Area	Phase	Master Project - Detail by Area			Utilities	Home
Client			John & Mary Smith			Pricing	Invoicing
Areas			Home Entertainment System			Payments	Purchasing
Area Text			1284.1-1.100			Project Fees	Work Orders
Products			Project Edit			Wire Manager	Change Orders
Overviews			QV			Grand Total	
Install Notes							
Supplements							
Super Views							
Labor Details							
CO Status							
Qty							
Make : Model							
Description							
Area & Product Totals							
Home Entertainment System							
Zone 1 - Home Theater							42,855.73
Audio : Amplifier : Multi-channel			1 ea	Linn : 5125	Five channel power amplifier (Black) :		2,750.00
Audio : Source : CD Player			1 ea	Linn : Classik Music-S	Integrated CD		1,550.00
Audio : Speaker : Bookshelf			5 pr	Linn : Katan	Bookshelf loudspeakers: pair : Black		4,975.00
Audio : Amplifier : Stereon			1 ea	Linn : Klimax Chakra 500 Twin_BindPnst	Klimax two-channel power amplifier :		7,995.00

Enhancement - Proposals/Pricing/Product Taxes: Add Labor Tax Flags

Adding a Product to a Proposal now automatically sets the Labor Tax A and Tax B Flags with the Default Labor Tax Flag settings for that Proposal.

You now have the option to Change (Reset) the Proposal Default Labor Tax setting using the "Auto Set Labor Tax Flag" utility from the Proposal - Product Tax screen. (This is the same as changing it from the Tax Summary screen..see pix below). This will reset All of the Product Labor in your Proposal.

You also have the option to set the Labor Tax Flag to E-Tax Exempt on any individual Products.

Auto Set Product Tax Flags		Auto Set Labor Tax Flags		Proposal - Product Tax				Refresh	Printer Setup	?	Print		
Jim Engandela													
Pricing		Labor		Commissions									
Tax Summary		Product Tax		Fees Tax		Home Entertainment System				Change Supplement Taxes from the Supplement Screens			
						1312.1-1.100							
Zone-area	Make Model	Product Tax Flag	Tax	Tax Flag	Labor Tax	Parts Tax	Bulk Wire Tax	Precut Wire Tax	Total Tax				
Atrium	Linn 5101 Personal Handset	Tax A:	<input type="text" value="T"/>	15.60	<input type="text" value="E"/>	15.80	10.20	18.48	9.60	157.88			
		Tax B:	<input type="text" value="T"/>	1.95	<input type="text" value="T"/>					1.28	2.31	1.20	35.54
		Total:		17.55						11.48	20.79	10.80	193.42
Atrium	Klipsch RC-35	Tax A:	<input type="text" value="T"/>	15.96	<input type="text" value="E"/>	0.25				22.54			
		Tax B:	<input type="text" value="T"/>	2.00	<input type="text" value="T"/>					0.82		3.07	
		Total:		17.96						7.40		25.60	

Auto Set Product Tax Flags		Auto Set Labor Tax Flags		Proposal - Tax Summary & Rates				Refresh	Printer Setup	?	Print
Jim Engandela											
Pricing		Labor Rates		Commissions							
Tax Summary		Product Tax		Fees Tax		Home Entertainment System				Change Supplement Taxes from the Supplement Screens	
						1312.1-1.100					
<i>Includes Both Bulk & Pre-Cut Wire & Cable</i>	Tax Summary		Sell	Tax A	Tax B	Total Tax					
	Equipment	\$789.00	\$31.56	\$3.95	=	\$35.51					
	Installation	\$3,210.00	\$0.00	\$16.05	=	\$16.05					
	Misc. Parts	\$2,855.00	\$114.20	\$14.28	=	\$128.48					
	Wire & Cable	\$866.40	\$34.66	\$4.33	=	\$38.99					
	Additional Fees	\$161.74			=						
	Total	\$7,882.14	\$180.42	\$38.60	=	\$219.02					
Tax Rate											
Location		A Tax Rate	+	B Tax Rate	=	Total Tax Rate					
Menomonie		4.000%		0.500%		4.500%					
Tax Status by Subtotal											
		A Tax Rate		B Tax Rate							
Products	<input type="text" value="T Taxable"/>			<input type="text" value="T Taxable"/>							
Labor	<input type="text" value="E Exempt"/>			<input type="text" value="T Taxable"/>							
Misc Parts	<input type="text" value="T - Taxable"/>			<input type="text" value="T Taxable"/>							
Bulk Wire & Cable	<input type="text" value="T - Taxable"/>			<input type="text" value="T Taxable"/>							
Pre-Cut Wire & Cable	<input type="text" value="T Taxable"/>			<input type="text" value="T Taxable"/>							

Enhancement - Product Library/Utilities/Export Products: Include Product Labor

When Exporting Products from the SCCPS product library, the Product Labor is now included in the Exported data.

The Export Map now pops up if you want to add or delete fields from the Product Export data or you can simply click in the Export button to leave the map as is.

Product Library Utility - Export Products

Click buttons 1-6 to Select & Export desired Products

1 Update Make List 2 Show Make List 3 Omit Undesired Makes 4 Show Product List 5 Omit Undesired Products 6 Export 18 Products

18 Items 451 Total

Displin	Cat	Type	Class	Make	Model	SKU	Description	Finish	Sell Price	Hidden
Audio	Ampli	Integrated Ampli	Crestron	Crestron	AADS	SKU1	Adagio Audio	Black	2,500.00 ea	
Audio	Multi	Switcher	Crestron	Crestron	AADS	XM	Adagio Audio	Black	2,900.00 ea	
Audio	Multi	Switcher	Crestron	Crestron	AAE		Adagio Audio	Black	1,800.00 ea	
Autom	Contr	Keypad	Crestron	Crestron	C2N	DB12_	Decorator Keypad 12	Specify	260.00 ea	
Autom	Contr	Keypad	Crestron	Crestron	C2N	DB6_	Decorator Keypad 6	Specify	260.00 ea	
Autom	Contr	Keypad	Crestron	Crestron	C2N	DB8_	Decorator Keypad 8	Specify	260.00 ea	
Audio	Ampli	Multi-channel	Crestron	Crestron	CNAMPX	12X60	12 Channel Multi-Room Black		2,800.00 ea	
Audio	Ampli	Multi-channel	Crestron	Crestron	CNAMPX	16X60	16 Channel Multi-Room Black		3,900.00 ea	
Audio	Ampli	Multi-channel	Crestron	Crestron	CNAMPX	2X60	2 Channel Amplifier Black		1,000.00 ea	

Product Library - Group Labor Supplements

1 of 451

Crestron AADS
Adagio Audio Distribution System
Audio : Amplifier : Integrated Amplifier

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

Group Assigned Labor

Audio : Amplifier : Integrated Amplifier

Classification: Product
Primary Install Phase: 3 Final

Labor Categories	Default Labor Rate	Group Labor Time (hrs:min:sec)		
		Phase 1 Prewire	Phase 2 Trim	Phase 3 Final
1 - Installation	\$60.00	0:00:00	0:00:00	0:30:00
2 - Programming	\$80.00	0:00:00	00:05:00	0:00:00
3 - Training	\$100.00	00:05:00	0:00:00	0:00:00
Total Labor Time		0:05:00	0:05:00	0:30:00 =
Total Labor Amount		\$8.33	\$6.67	\$30.00 = \$45.00 Amount

Do not use Group Labor

Engage Manual Labor Override

Apply DOD 2 Avg 10%

Apply DOD 3 Avg 50%

Enhancement - Task Manager: Go Directly into Proposal-Project-Change Orders

You can now go into a Proposal or Project directly from the Master Tracker by clicking on the view icon next to the Proposal or Project number.

Find Items		Show All		Proposals		Projects & CO's		Change Orders		Completed		Tasks		Appointments		Master Tracker		Milestones		Utilities	
New Task		Today		Proposals		Projects & CO's		Change Orders		Completed		Tasks		Appointments		Friday October 31, 2014 User: Jim Engandela 10 Items 845 Total		Proposals Due		Gantt	
New Appointment		This Week		Proposals		Projects & CO's		Change Orders		Completed		Tasks		Appointments				Install Phases		Leave	
		This Month		Proposals		Projects & CO's		Change Orders		Completed		Tasks		Appointments				Payments Due		Calendar	
		Next Month		Proposals		Projects & CO's		Change Orders		Completed		Tasks		Appointments				Purchasing Due		Email All	
		Past Items		Proposals		Projects & CO's		Change Orders		Completed		Tasks		Appointments				All Milestones		Tracker	
				Proposals		Projects & CO's		Change Orders		Completed		Tasks		Appointments						Print Menu	
Adm View Task		Due Date		Tracker Item		Proposal Project		Item Owner		Total Labor		Auto-Tag									
Mgr Real Date		Month - Day		Item Name		Client - Company		Email		Total Pymts		Info Email Print									
User Done		Appoint Time		Description		Proposal/Project Title		Status/Notes		\$9,220.31		Tag Hide Delete									
11/1/2014		Nov - Sat		Proposal Task - Review		1311.1-1.100		Jim Engandela		0:00											
11/1/2014		Nov - Sat		Proposal Task - Review		1312.1-1.100		Jim Engandela		No email											
11/6/2014		Nov - Thu		Proposal Milestone - Proposal Due		1311.1-1.100		Jim Engandela		No email											
11/6/2014		Nov - Thu		Proposal Milestone - Proposal Due		1312.1-1.100		Jim Engandela		No email											

When clicking the Leave button you will return to the Master Tracker, Click Home to go to the main logo screen instead.

Discipline		Area		Phase		Proposal - Detail by Area		Utilities		Home	
Client		Areas		Area Text		Jim Engandela		Pricing		Leave	
Project		Info		Products		Home Entertainment System		Payments		Tracker	
Contact		Log		Supplements		1311.1-1.100		Project Fees		Print Menu	
Client Mode		Labor Details		Super Views		QV		Wire Manager		Grand Total	
Discipline : Category : Type		Qty		Make : Model		Description		Change Orders		Area & Product Totals	
						Home Entertainment System					
						Atrium				7,042.00	
Audio : Multi-room : Keypad		1 ea		Linn : 5101 Personal Handset		Universal learning remote : Black				390.00	

Enhancement - Project/Payments/Payment Report: Refine layout for better clarity

The Project/Payment Report has been redesigned for better clarity.

Store Report Master Project Payment Summary		Katrina Polaski Home Entertainment System 1592.2-1.4				Page 1 6/13/2013
Actual	Deposit Deposit Due when the proposal is accepted and signed.	Phase 1 Payment Payment 1 Due 60 days before the installation trim phase.	Phase 2 Payment Payment 2	Phase 3 Payment Payment 3	Holdback Hold Back Due at the completion of the installation.	Totals
Original Project						
Project Totals		822.78	4,204.35	4,000.68		9,027.81
Pymt Date Due						
Date Invoiced	3/12/2013					
1 Payment Amt Made	4,000.00	3,500.00				7,500.00
Pymt Made Dates	2/8/2013	6/11/2013				
Pymt Notes						
2 Payment Amt Made						
Pymt Made Dates						
Pymt Notes						
3 Payment Amt Made						
Pymt Made Dates						
Pymt Notes						
- Total Payments	4,000.00	3,500.00				7,500.00
Balance Due	-4,000.00	-2,677.22	4,204.35	4,000.68		1,527.81
All Final Change Orders						
CO Totals	72.45	57.96	0.00	0.00	7.25	137.66
- Payments Made						
Balance Due	72.45	57.96	0.00	0.00	7.25	137.66
Master Project Includes Project & All CO's						
Master Proj Totals	72.45	880.74	4,204.35	4,000.68	7.25	9,165.47
- Payments Made	4,000.00	3,500.00				7,500.00
Total Balance Due	-3,927.55	-2,619.26	4,204.35	4,000.68	7.25	1,665.47

Enhancement - Proposal/Supplements: Increase All Portals to 100 Records

The Labor, Parts, Wire and Task Supplement Portals have been increased to display 100 records to make it easier for you to see all of your data.

All Supplements		Delete All Labor		Proposal - Labor Supplements				Phantom Supplement =		Print	?	Home	
Areas			Text			Products			Jim Engandela				
Labor			Parts			Wire			Tasks			Home Entertainment System 1312.1-1.100	
Labor assigned to			View			Labor Type			Install			Total Time with DOD	
Zone - Area	Qty	Make : Model	Edit	Sort	Note	A	B	Phases	(h:m:s)	Hourly Rate	Ext Sell	Tax A B	
Atrium	2	Klipsch : RC-35	Q					3	0:40:00	\$60.00	\$40.00	T	T
Atrium		Klipsch : RC-35	Q					1	1:00:00	\$60.00	\$60.00	T	T
Atrium		Linn : 5101 Personal Handset	Q					1,2,3	6:00:00	\$60.00	\$360.00	T	T
Atrium		Linn : 5101 Personal Handset	Q					1,2,3	9:00:00	\$80.00	\$720.00	T	T
Atrium		Linn : 5101 Personal Handset	Q					1,2,3	18:00:00	\$100.00	\$1,800.00	T	T
Atrium		Linn : 5101 Personal Handset	Q					1,2,3	3:00:00	\$50.00	\$150.00	T	T
Atrium		Linn : 5101 Personal Handset	Q					1	2:00:00	\$60.00	\$120.00	T	T
Atrium	1	Linn : 5101 Personal Handset	Q					3	0:10:00	\$60.00	\$10.00	T	T

Increase Portal to 100 Labor Records

Enhancement - Proposal/Labor Detail: Add Labor Supplements with Phase Times to screen

The Labor Detail Summary screen now includes the Phase 1, 2 and 3 Labor Times to help you see how much labor has been assigned to each Labor record and related product.

Proposal - Labor Details - Phase - Labor Category by Phase										Print	?	Home			
Labor Categories by Phase			Labor Categories by Areas			Labor Categories by Discipline			Jim Engandela				Proposal Detail		
									Home Entertainment System 1312.1-1.100				Labor Meter		
Installation Type: New-3 Phase Pre-Trim-Final													Labor Supplements		
Hourly Labor Rates															
Labor Category		Sell	Cost	Degree of Difficulty											
Installation		60.00	30.00	1 - Prewire	0%										
Programming		80.00	40.00	2 - Trim	0%										
Training		100.00	50.00	3 - Final	0%										
Parts Labor		50.00	30.00	Parts Time - per each	0:15:00 h:m:s										
Wire Labor - Bulk		60.00	35.00	Bulk Wire Time - per foot	0:00:30 h:m:s										
Wire Labor - Precut		60.00	40.00	Precut Wire Time - per pair	0:05:00 h:m:s										
Time = hrs:min:sec															
Labor Categories by Phase															
Labor Category	Phase 1 Prewire		Phase 2 Trim		Phase 3 Final		Total								
	Time	Amount	Time	Amount	Time	Amount	Time	Amount	GP%						
1 - Installation	1:00:00	\$60.00	2:00:00	\$120.00	3:40:00	\$220.00	6:40:00	\$400.00	50.0%						
2 - Programming	2:00:00	\$160.00	3:00:00	\$240.00	4:00:00	\$320.00	9:00:00	\$720.00	50.0%						
3 - Training	5:00:00	\$500.00	6:00:00	\$600.00	7:00:00	\$700.00	18:00:00	\$1,800.00	50.0%						
4 - Parts Labor	0:15:00	\$12.50	1:30:00	\$75.00	1:15:00	\$62.50	3:00:00	\$150.00	40.0%						
5 - Wire Labor - Bulk	3:00:00	\$180.00					3:00:00	\$180.00	41.7%						
6 - Wire Labor - Precut					0:10:00	\$10.00	0:10:00	\$10.00	33.3%						
Total	11:15:00	912.50	12:30:00	1,035.00	16:05:00	1,312.50	39:50:00	\$3,260.00	49.0%						
All Areas															
Labor Supplements															
Labor assigned to			View			Labor Type			Install			Total Time with DOD			
Zone - Area	Qty	Make : Model	Edit	Sort	Note	A	B	Phases	Phase 1	Phase 2	Phase 3	(h:m:s)	Hourly Rate	Ext Sell	Tax A B
Atrium	2	Klipsch : RC-35	Q					3	0:00:00	0:00:00	0:20:00	0:40:00	\$60.00	\$40.00	T T
Atrium	2	Klipsch : RC-35	Q					1	0:30:00	0:00:00	0:00:00	1:00:00	\$60.00	\$60.00	T T
Atrium	1	Linn : 5101 Personal Handset	Q					1,2,3	1:00:00	2:00:00	3:00:00	6:00:00	\$60.00	\$360.00	T T
Atrium	1	Linn : 5101 Personal Handset	Q					1,2,3	2:00:00	3:00:00	4:00:00	9:00:00	\$80.00	\$720.00	T T
Atrium	1	Linn : 5101 Personal Handset	Q					1,2,3	5:00:00	6:00:00	7:00:00	18:00:00	\$100.00	\$1,800.00	T T
Atrium	1	Linn : 5101 Personal Handset	Q					1,2,3	0:15:00	1:30:00	1:15:00	3:00:00	\$50.00	\$150.00	T T
Atrium	1	Linn : 5101 Personal Handset	Q					1	2:00:00	0:00:00	0:00:00	2:00:00	\$60.00	\$120.00	T T
Atrium	1	Linn : 5101 Personal Handset	Q					3	0:00:00	0:00:00	0:10:00	0:10:00	\$60.00	\$10.00	T T

Enhancement - Project List: Add "View All Change Orders" button

You can now View all of the Pending and Final Change Orders for All Projects from the Project List screen.

The screenshot shows the 'Projects' screen with a table of project entries. A red arrow points to the 'All Change Orders' button in the 'Access Levels' menu. The user is identified as Jim Engandela, Administrator, at EME Audio & Video Systems.

Status	Dup	View	CO	Number	User	Client	Company	Project Title	Sold	Total	Fav	
				1303.1-1.100		Engandela, Jim		Home Entertainment		\$0	<input type="checkbox"/>	<input type="checkbox"/>
				1298.1-1.100		Asher, LeRoy		Home Entertainment	7/2/2014	\$42,170	<input type="checkbox"/>	<input type="checkbox"/>
				1297.1-1.100		Asher, LeRoy		Home Entertainment	6/30/2014	\$50,033	<input type="checkbox"/>	<input type="checkbox"/>
				1288.1-1.100				Home Entertainment	4/25/2007	\$6,959	<input type="checkbox"/>	<input type="checkbox"/>

Enhancement - Product Library/Product Detail: Automatically display Default Vendor

The Product Library now automatically displays Default Vendor from the Contact library.

The screenshot shows the 'Product Library - Product Detail' screen for a Crestron AADS product. A red arrow points to the 'Default PO Vendor' field, which is set to 'Crestron LTD'. The product is an 'Audio : Amplifier : Integrated Amplifier' with a net price of \$2,500.00.

Product Information:
 Make: Crestron, Model: AADS, Sell Price: \$2,500.00 ea.
 Description: Adagio Audio Distribution System1234567891234567
 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.

Purchasing Information:
 Default PO Vendor: Crestron LTD
 Default PO Cost: \$1,250.00
 Net Price: \$2,500.00
 Loaded Price: \$2,500.00
 Minimum Sell: \$1,250.00
 Net Cost: \$1,250.00
 GP: 50.0%

Find Products		Fav A		B	C	Show Hidden		Product Library - Detail List												AlphaFinder Show Makes		Home				
All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Show Products		Hidden Products		Line List														Phan Part		Utilities		Done				
Part Phantom		All Suppliments		Recent Products														Lab Wire		448 Items		New Product		Product Sets		
Bulk PreCut		Discontinued Products																		451 Total				Print Menu		
All Product Groups				Class View		Make Vendor		Model : SKU Phase		Description		Finish Notes		Price		Tag All										
Dept		Cat		Type		Created						Q (Installed)		Fav		Hide										
Audio	Multi	Switcher		Crestron		AADS-XM : 222		Adagio Audio		Black																
Prewire		Trim		Final		Total		Product		Parts		Wire		Product Sell		\$2,900.00 ea										
0:00:00		0:30:00		0:15:00 =		0:45:00		\$2,900.00						Parts & Wire		50.0%										
		\$30.00		\$15.00 =		\$45.00		\$45.00						Labor Total		\$45.00										
4/6/2006				Crestron LTD		2		\$2,945.00						Installed Total		\$2,945.00 50.0%										
Audio	Multi	Switcher		Crestron		AAE : 333		Adagio Audio		Black																
Prewire		Trim		Final		Total		Product		Parts		Wire		Product Sell		\$1,800.00 ea										
0:00:00		0:30:00		0:15:00 =		0:45:00		\$1,800.00						Parts & Wire		50.0%										
		\$30.00		\$15.00 =		\$45.00		\$45.00						Labor Total		\$45.00										
4/6/2006				Crestron LTD		2		\$1,845.00						Installed Total		\$1,845.00 50.0%										

Enhancement - Contacts/Contact Detail: Client, Info and Map Text Block Redesign

The Contact Detail Text Blocks are redesigned to indicate the ones that are Global to all Proposals and Projects.

Contacts - Contact Detail

Engandela, Jim
Hoizon Software

Category: Vendor

Fav	Print	Title	First Name	Last Name	Info	Email Address
<input checked="" type="radio"/>	<input checked="" type="radio"/>		Jim	Engandela	President	
<input type="radio"/>	<input type="radio"/>					
<input type="radio"/>	<input type="radio"/>					
<input type="radio"/>	<input type="radio"/>					
<input type="radio"/>	<input type="radio"/>					
<input type="radio"/>	<input type="radio"/>					
<input type="radio"/>	<input type="radio"/>					
<input type="radio"/>	<input type="radio"/>					

Address 1
Address 1: S15700 County Road U
City: Strum
State: WI Zip: 54770

Phone Numbers
Home Phone: 715-287-3335
Work Phone:
Mobile Phone: 715-287-3335
Favorite Phone (H) 715-287-3335

Global - Contact Notes
Global Contact Library Notes
This Note is Global and stored in the Contact Library and will appear in every Proposal or Project for this Client

Proposal & POS Entity Label
Jim Engandela
Hoizon Software
S15700 County Road U
Strum, WI 54770

Contact Print Merge Label
Jim Engandela
Hoizon Software
S15700 County Road U
Strum, WI 54770

This Note is Global and stored in the Contact Library and will appear in every Proposal or Project for this Client

The Contact Info Text Blocks are redesigned to indicate the ones that are Global to all Proposals and Projects and which ones are Specific to only the Contact.

? Home

Jim Engandela
 Hoizon Software

Maps and Directions

Done

Date Stamp
Print Notes

Global - Contact Notes

Global Contact Library Notes

This Note is Global and stored in the Contact Library and will appear in every Proposal or Project for this Client.

This Note is Global and stored in the Contact Library and will appear in every Proposal or Project for this Client.

Charge Card

Card Type

Name on Card

Card Number

Code

Expire Date

Pay Terms

Credit Limit

Credit Notes

This Note is Global and stored in the Contact Library and will appear in every Proposal or Project for this Client.

Specific - Contact Notes

Library Specific - Contact Notes

This Note is stored in the Contact Library and will not show up in Projects.

This Note is stored in the Contact Library and will not show up in Projects.

Labels	Other Info	Misc Info	Misc Info
Misc:			
Special Terms:			
Guides:			
ID#:			
Proposal			
Project			
Misc			
Referred By			

Contact Info	Other Info	Project PO Label
Hoizon Software - Jim Engandela	RCMS Customer ID	Hoizon Software
Address 1: S15700 County Road U Strum, WI 54770	Employee Number 100	S15700 County Road U
Address 2:	Record ID.c 122	Strum, WI 54770
(H)715-287-3335 (C)715-287-3335	Creation Date: 12/1/2001	
	Modified Date: 11/11/2014	

The Contact Map Text Blocks are redesigned to indicate the ones that are Global to all Proposals and Projects.

Jim Engandela
Hoizon Software

Get Internet Map

Done

Details

Info

Com Log

Entities

Transactions

Prop Prefs

Prev Next
1 of 132

These Maps are Global and stored in the Contact Library and will appear in every Project for this Client

Paste Text Directions

Global - Site Directions

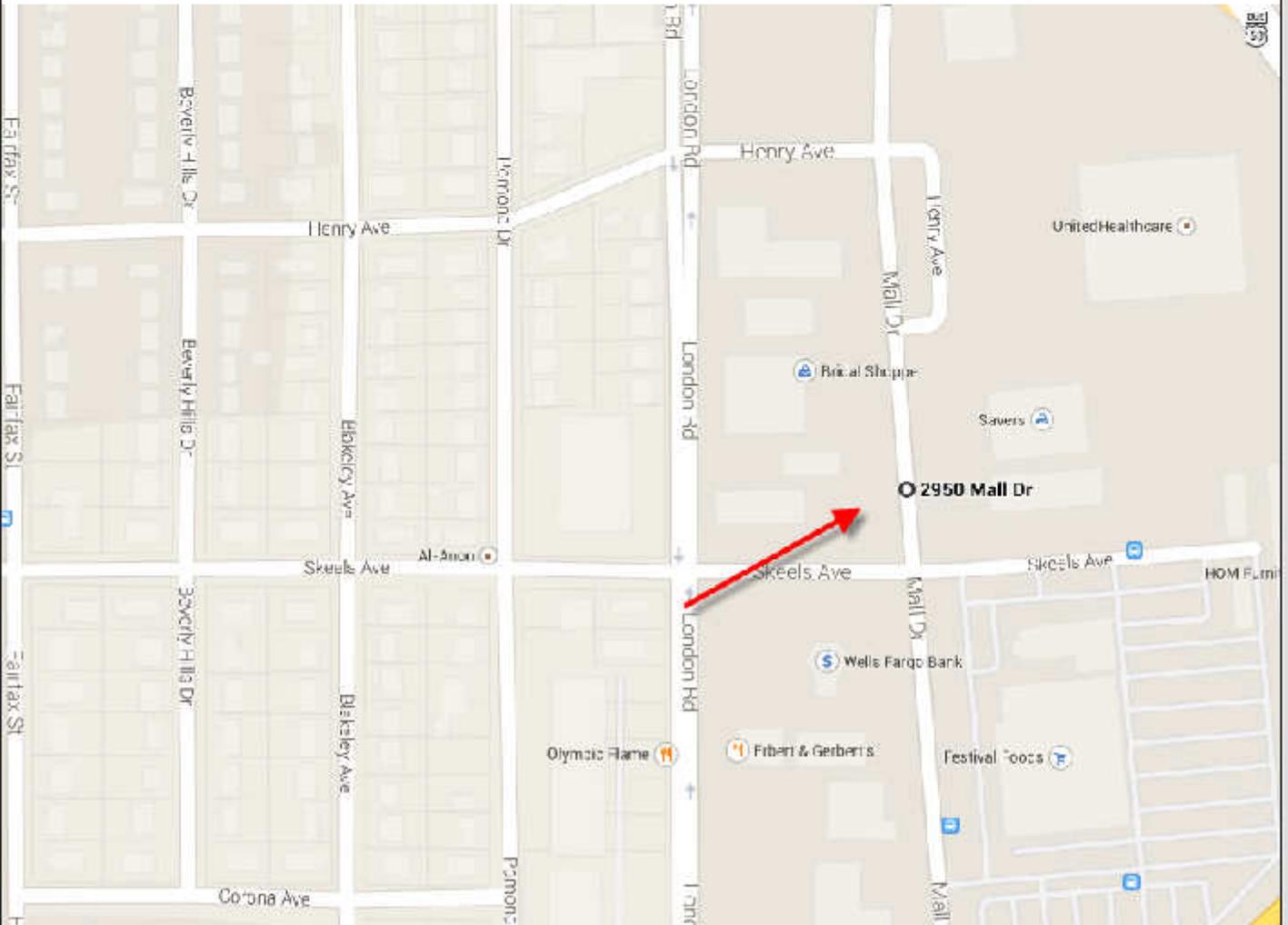
Global - Site Direction Notes

These Maps are Global and stored in the Contact Library and will appear in every Project for this Client

Paste Map Pix Clear

Global - Site Map

Insert File Pix



Enhancement - Proposals/Projects: Client, Project, Info screen and Text Block Redesign

It is important to know that some of the Text blocks in a Proposal or Project actually reside on the Contact record in the Contact Library.

These are now labeled as Global fields so you know that text that you enter into these fields will appear on all Proposals and Projects for that Contact.

Other Text fields are Specific to a particular Proposal or Project and these are labeled as Specific.

Other Text fields in a Proposal or Project appear on Project Work Orders and these are Labeled as such.

The Proposal/Project - Client screen now has the Global Contact Text field that is tied to all Proposals and Projects for that Client.

Use Alt Billing Client Mode **Proposal - Client** 122

Client **Project**

Jim Engandela
Hoizon Software
Home Entertainment System
1313.1-1.100

Done

Info **Contacts** Com Log **Follow-Up Letters**

Client Modify or Switch Contact

First Name: Jim
Last Name: Engandela
Company: Hoizon Software
Proposal Name: Jim Engandela
Fav Format: First Name + Last Name

Address

Address 1: S15700 County Road U
Cross Street:
City: Strum
State: WI Zip: 54770
County:
Country:

Address 2:
Copy 1>2
Cross Street:
City:
State: Zip:
County:
Country:

Email
eMail Address:

Label
Jim Engandela
Hoizon Software
S15700 County Road U
Strum, WI 54770
(H) 715-287-3335

Numbers

Home Phone: 715-287-3335 Ext:
Work Phone: Ext:
Ext:
715-287-3335
Fax 1:

Select Tax: New Tax Update

Tax: Yes No
Tax Region: Menomonie Tax A: 4.000%
Location ID: Tax B: 0.500%
Location #: Total Tax: 4.500%

Pick	Region	Location ID	Tax A	Total
	Zip Code	Location #	Tax B	Tax
	Eau Claire		5.500%	5.500%
	54770			
	Menomonie		4.000%	4.500%
	54701		0.500%	

Global - Contact Notes

Global Contact Library Notes

This Note is Global and stored in the Contact Library and will appear in every Proposal or Project for this Client

This Note is Global and stored in the Contact Library and will appear in every Proposal or Project for this Client.

The Proposal/Project - Project screen now has the Work Order - Install Overview Text that appears on the Printed Project Work Orders.

The Project screen also has the Maps and Directions button to add Site Directions and Maps to the Project.

Reset Project to Master Prefs Printer Setup ? Print

Proposal - Project Details

Jim Engandela
Hoizon Software
Home Entertainment System
1313.1-1.100

Project Approval Done
Maps and Directions

Proposal-Project Title
Home Entertainment System

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

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 Update
Proposal Due 11/25/2014

Install Phase Dates

Start Dates

1 - Prewire

2 - Trim

3 - Final

Completion Date
Target Completion Date

Work Order - Install Overview

These are Install Notes that appear on the Project Installation Notes for this Project.

This Note is Specific to this Project and is on the Work Orders for this Client

Labor Degree of Difficulty

Building Type

Number of Floors

Project Difficulty %

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 square feet

Wire Length Change Factor: 100 %

Bulk Home Run - Avg Wire Length: 60 per Home Run

Bulk Room Run - Avg Wire Length: 60 per Room Run

Itemize each Wire & Cable entry: Yes ?
 No

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

Home Run Wire Length is changed by Building Size. Room Run Wire Length is fixed. Itemize Wire & Cable only affects newly added wire.

The Proposal/Project - Info screen now has Project Specific - Shop Notes and buttons to go to the Project File Attachment and Project Pictures screens.

Proposal - Info

Printer Setup ? Print

Client Project

Jim Engandela
Hoizon Software
Home Entertainment System
1313.1-1.100

Done

Info Contacts Com Log

Project File Attachments Project Pictures

Proposal-Project Info

Project Reference
Blueprint Reference
Where did you hear?
Client Referred By

Reasons Lost Proposal

Specialist Info

Update

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

Sales Specialist Jim Engandela
Title President
Email No Contact Email

Project Manager
Email No Contact Email

Project Engineer Jon Oster
Email horizonjon@trivest.net

Project Engineer
Email

Project Engineer
Email

Additional "Client Intro Letter" Signature

Name
Title
Company

Send Email
 Client Manager
 Salesman Engineer

Request to Review Proposal from Salesman to Project Manager
 Proposal Reviewed & Approved Reply from Project Manager to Salesman

Project Specific - Shop Notes

These are Shop Notes that are Specific to This Proposal-Project.

This Note is Specific to this Project and is on the Info Report

Project Info Summary

Created 11/10/2014
Modified 11/11/2014
Sold
Completed

Original Proposal/Project Title
Home Entertainment System

Shop Location: 1
Alt Shop Location: 01
Salesman's Number : 100
User Access Level : Administrator

New-3 Phase Pre-Trim-Final
1 - Prewire 2 - Trim 3 - Final

The Maps & Directions screen enables you to enter Site Directions and Maps and these are Global so they reside with the Contact in the Contact Library and will appear in all Proposals and Projects for that Client.

Proposal - Maps & Directions Printer Setup ? Print

Get Internet Map **Jim Engandela** **Hoizon Software** **Done**

Home Entertainment System
1313.1-1.100

Paste Text Directions **Text Directions**

Global - Site Direction Notes
These Maps are Global and stored in the Contact Library and will appear in every Project for this Client

Paste Map Pic **Clear** **Map Picture** **Insert File Pic**

The map displays a street grid with several streets labeled: Fairfax St, Beverly Hills Dr, Liberty Ave, Speck Ave, Al-Bacon, London St, London Rd, Henry Ave, Wells Ave, and Nicolls Ave. A red arrow points to a location on the map labeled "2950 Mall Dr". Other landmarks visible include "UnitedHealthcare", "Rak al Steg", "Sawers", "Wells Fargo Bank", "Festival Foods", and "Pobert & Getber's".

Enhancement - Product Library/Find Products: Redesign Find Products Screen for better clarity

The Product Library Find screen has been redesigned for easier use. The SKU field has been added to the Find Criteria as well.

Fast Find			Product Library - Find Products			Clear Find Fields				
Enter Full or Partial Make or Model or SKU or Description			Supplier			Install Phase				
<input type="text"/>			<input type="text"/>			<input type="text"/>				
			Enter Find Criteria Click the Done/Find button			Advanced Find Criteria				
Pick or Enter Product Make-Model-SKU				Pick Product Group						
Make		Model		SKU		Discipline		Category		
Crestron		> <input type="text"/>		or <input type="text"/>		<input type="text"/>		> <input type="text"/>		> <input type="text"/>
<input type="button" value="Refresh Make List"/> <input type="button" value="Find Multiple Makes"/>								First Pick a Discipline, then Category, then Type Or Pick a White Group		
Crestron	AADS	SKU1	Audio	Amplifier	Integrated Amp					
DiracTV	AADS-XM	222	Audio	Amplifier	Multi-channel					
EME	AAE	333	Audio	Amplifier	Preamplifier					
Klipsch	C2N-DB12_		Audio	Amplifier	Single Channel					
Linn	C2N-DB6_		Audio	Amplifier	Small Amp					
Middle Atlantic	C2N-DB8_		Audio	Amplifier	Stereo					
Monster	CNAMPX-12X60		Audio	Amplifier	Stereo Receive					
Runco	CNAMPX-16X60		Audio	Amplifier	Surround Proc					
Sonance	CNAMPX-2X60		Audio	Amplifier	Surround Rece					
Sony	CNAMPX-7X200		Audio	Control	Multi-channel					
Widget	CNX-B12_		Audio	Misc	Final Part					
Yamaha	CNX-B2_		Audio	Misc	Prewire Part					
	CNX-B4_		Audio	Misc	Trim Part					
	CNX-B6_		Audio	Multi-room	Amplifier					
	CNX-B8_		Audio	Multi-room	Controller					

Fix: Project/Change Order: Totals Posting

The Change Order Header that determines the Change Order total now correctly indicates the status of the Change Order.

Fix - Proposals/Products: Changing Product Qty retains List View

SCPS 11.4v4 Upgrade
New Features, Enhancements and Fixes
10-28-2014

Fix: Project/Change Orders: Fix Totals Posting

When leaving a Change Order and going to the Project Change Order screen, the posted total of the CO was incorrect, because the CO status flag was set to "J" for Project, instead of "C" for Change Order.

**SCPS 11.4v3 Upgrade
New Features, Enhancements and Fixes
10-15-2014**

Fix: Project/Change Orders: Print All not Printing Fees

When printing the entire Change Order, the Fees are now printing properly.

Fix - Proposals/Print Menu: Product Summary with Prices Report: Show Ext Price

Regardless of the Print Option Price settings (Hide Prices) the Product Summary with Prices Report now shows the Extended Price. Also fixed on the Custom Reports module 11.4v1.

Home Entertainment System
for Jim Engandela



Product Summary

		<u>Unit Price</u>	<u>Ext Price</u>
Audio			
2 ea	Klipsch : RC-35 : Center Channel Speaker : Black Ash <i>This center channel has been engineered to deliver all the detail, subtleties and dynamics required for the ultimate home theater experience. It delivers detailed, subtle and thrilling sounds through dual 6.5-inch woofers and a 1-inch tweeter that has a light titanium-dome diaphragm and a high-energy, video-shielded Neodymium magnet. The tweeter is coupled to an exclusive Klipsch square Tractrix® Horn that</i>	\$3,995.00	\$7,990.00
			

**SCPS 11.4v2 Upgrade
New Features, Enhancements and Fixes
10-1-2014**

Fix: Project/Final Change Orders: Not going to CO Print Menu

Navigation now works correct when going from a Change Order to the Print Menu.

**SCPS 11.4v1 Upgrade
New Features, Enhancements and Fixes
9-15-2014**

- **Enhancement - Proposals & Projects/Labor Details: Discipline - Labor Category by Phase**
- **Enhancement - Proposals & Projects/Labor Details: Area - Labor Category by Phase**
- **Enhancement - Proposals & Projects/Labor Details: Phase - Labor Category by Phase**
- **Enhancement - Proposals/Print Menu/Projects: Print Phase, Area & Discipline Labor - Category by Phase**
- **Enhancement - Proposals/Product Detail: Hide Printed Price**
- **Enhancement - Proposals/Areas & Products: No Pick Product Prompt (when adding Areas)**
- **Enhancement - Proposal/Fees: Improve Fees Screens, Print Options**
- **Enhancement - Proposal/Print Menu: Improve Print Options screens**
- **Enhancement - Proposal/Print Menu/Print Option: Fees & Supplement Reports: Hide Pricing**
- **Enhancement - Master Prefs/Users/Access Rights: Do Not Add Products to Proposals or Change Orders**
- **Enhancement - Product Library/Product Detail screen: Optimize screen Layout GUI**
- **Enhancement - Product Library/Detail List: Add and Sort by Creation Date**
- **Enhancement - POS/PO screen: Increase PO Number field size**
- **Enhancement - Proposal/Project: Phase Safety Check & Set Phase Screens**
- **Fix - Proposal/Print Menu: Print Labor Summary returns to Print Menu instead of Print Preview**
- **Fix - Proposal/Print Menu: Print Custom Reports returns to Print Menu instead of Payment Terms**
- **Fix - Project/Change Orders: Remove Prompt to Toggle CO**

- **Fix - POS/Purchase Orders: Hide Printed Prices on all 100 Line Items**
- **Fix - POS/Purchase Orders: Receive Qty on all 100 Line Items**

Enhancement - Proposals & Projects/Labor Details: Discipline - Labor Category by Phase

The new Discipline Labor Category by Phase screen and Report shows Grand Totals and Totals for each Discipline in your Proposal/Project.

Remember that Disciplines are a function of the Group assigned to each Product in your Product Library and Product and Supplements in your Proposal can have their Groups (Discipline:Category:Type) reassigned from the Product Detail screen within a Proposal.

Labor by Phase, Area & Discipline can be accessed from the Labor Details button on the main Proposal/Project-Detail by Area screen.

Discipline				Area				Phase				Proposal - Detail by Area				Utilities			Home		
Client				Areas				Area Text				Home Entertainment System 1267.1-1.100				Pricing	Invoicing		Leave		
Project		Info		Products		Overviews		Payments	Purchasing		Tracker										
Contact		Log		Supplements		Install Notes		Project Fees	Work Orders		Print Menu										
Client Mode		<input type="checkbox"/>		Labor Details		Super Views		QV		Wire Manager	Change Orders					Grand Total					
Discipline : Category : Type				Qty				Make : Model				Description				Area & Product Totals					
Home Entertainment System																					
Bedroom 2																38,818.65					
Audio : Multi-room : Switcher				1				Crestron : AADS				Adagio Audio Distribution System				2,500.00					
Audio : Multi-room : Switcher				2 ea				Crestron : AADS				Adagio Audio Distribution System				5,000.00					
Audio : Multi-room : Keypad				1 ea				Linn : 5100 Personal Handset				Universal learning remote				390.00					
Audio : Amplifier : Multi-channel				1 ea				Linn : 5125				Five channel power amplifier (Black)				2,750.00					
Audio : Speaker : Bookshelf				5 pr				Linn : Katan				Bookshelf loudspeakers: pair				4,975.00					
Audio : Speaker : Powered Subwoofer				1 ea				Linn : Melodik				Aktive isobarik bass extension				4,950.00					
Video : Display : DLP Video Projector				1 ea				Runco : CL-610				DLP Projector				7,995.00					
Video : Source : DVD Player				1 ea				Sony : DVP-NS999ES				Progressive Scan DVD Player				1,099.95					
Automation : Control : Keypad				1 ea				Linn : Knekt RCU				Knekt room control unit				750.00					

Labor Details - Discipline - Labor Category by Phase

Labor Categories by Phase	Labor Categories by Areas	Labor Categories by Discipline	Ace Matthews All Creative Enterprises Home Automation 1270.1-1.100	Done
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Grand Total - Labor Category by Phase

Labor Category	Phase 1 Prewire		Phase 2 Trim		Phase 3 Final		Total	
	Time	Amount	Time	Amount	Time	Amount	Time	Amount
1 - Installation	4:35:00	\$275.00	5:10:00	\$310.00	18:05:00	\$1,085.00	27:50:00	\$1,670.00
2 - Programming					4:00:00	\$320.00	4:00:00	\$320.00
3 - Training					2:05:00	\$208.33	2:05:00	\$208.33
4 - Parts Labor			1:00:00	\$50.00	2:30:00	\$125.00	3:30:00	\$175.00
5 - Wire Labor - Bulk	21:15:00	\$1,275.00			0:20:00	\$20.00	21:35:00	\$1,295.00
6 - Wire Labor - Precut					1:30:00	\$90.00	1:30:00	\$90.00
Grand Total	25:50:00	\$1,550.00	6:10:00	\$360.00	28:30:00	\$1,848.33	60:30:00	\$4,258.33

Audio Discipline - Labor Category by Phase

Labor Category	Phase 1 Prewire		Phase 2 Trim		Phase 3 Final		Total	
	Time	Amount	Time	Amount	Time	Amount	Time	Amount
1 - Installation	2:35:00	\$155.00	3:10:00	\$190.00	17:05:00	\$1,025.00	22:50:00	\$1,370.00
2 - Programming					1:30:00	\$120.00	1:30:00	\$120.00
3 - Training					1:00:00	\$100.00	1:00:00	\$100.00
4 - Parts Labor					1:30:00	\$75.00	1:30:00	\$75.00
5 - Wire Labor - Bulk	15:00:00	\$900.00					15:00:00	\$900.00
6 - Wire Labor - Precut					1:20:00	\$80.00	1:20:00	\$80.00
Audio	17:35:00	\$1,055.00	3:10:00	190.00	22:25:00	\$1,400.00	43:10:00	\$2,645.00

Video Discipline - Labor Category by Phase

Labor Category	Phase 1 Prewire		Phase 2 Trim		Phase 3 Final		Total	
	Time	Amount	Time	Amount	Time	Amount	Time	Amount
1 - Installation					1:00:00	\$60.00	1:00:00	\$60.00
2 - Programming								
3 - Training					0:45:00	\$75.00	0:45:00	\$75.00
4 - Parts Labor								
5 - Wire Labor - Bulk								
6 - Wire Labor - Precut					0:10:00	\$10.00	0:10:00	\$10.00
Video					1:55:00	\$145.00	1:55:00	\$145.00

Automation Discipline - Labor Category by Phase

Labor Category	Phase 1 Prewire		Phase 2 Trim		Phase 3 Final		Total	
	Time	Amount	Time	Amount	Time	Amount	Time	Amount
1 - Installation	2:00:00	\$120.00	2:00:00	\$120.00			4:00:00	\$240.00
2 - Programming					2:30:00	\$200.00	2:30:00	\$200.00
3 - Training					0:20:00	\$33.33	0:20:00	\$33.33
4 - Parts Labor			1:00:00	\$50.00	1:00:00	\$50.00	2:00:00	\$100.00
5 - Wire Labor - Bulk	6:15:00	\$375.00			0:20:00	\$20.00	6:35:00	\$395.00
6 - Wire Labor - Precut								
Automation	8:15:00	\$495.00	3:00:00	170.00	4:10:00	\$303.33	15:25:00	\$968.33

Enhancement - Proposals & Projects/Labor Details: Area - Labor Category by Phase

The new Area Labor Category by Phase screen and Report shows Grand Totals and Totals for each Area in your Proposal/Project.

Labor by Phase, Area & Discipline can be accessed from the Labor Details button on the main Proposal/Project-Detail by Area screen.

Discipline				Area				Phase				Proposal - Detail by Area				Utilities			Home					
Client				Areas				Area Text				Home Entertainment System 1267.1-1.100				Pricing			Invoicing			Leave		
Project		Info		Products		Overviews		Payments			Purchasing					Tracker								
Contact		Log		Supplements		Install Notes		Project Fees			Work Orders					Print Menu								
Client Mode <input type="checkbox"/>				Labor Details				Super Views								QV				Wire Manager			Change Orders	
Discipline : Category : Type				Qty				Make : Model				Description				Area & Product Totals								
Home Entertainment System																								
Bedroom 2																								
38,818.65																								
Audio : Multi-room : Switcher				1 ea				Crestron : AADS				Adagio Audio Distribution System				2,500.00								
Audio : Multi-room : Switcher				2 ea				Crestron : AADS				Adagio Audio Distribution System				5,000.00								
Audio : Multi-room : Keypad				1 ea				Linn : 5100 Personal Handset				Universal learning remote				390.00								
Audio : Amplifier : Multi-channel				1 ea				Linn : 5125				Five channel power amplifier (Black)				2,750.00								
Audio : Speaker : Bookshelf				5 pr				Linn : Katan				Bookshelf loudspeakers: pair				4,975.00								
Audio : Speaker : Powered Subwoofer				1 ea				Linn : Melodik				Aktive isobarik bass extension				4,950.00								
Video : Display : DLP Video Projector				1 ea				Runco : CL-610				DLP Projector				7,995.00								
Video : Source : DVD Player				1 ea				Sony : DVP-NS999ES				Progressive Scan DVD Player				1,099.95								
Automation : Control : Keypad				1 ea				Linn : Knekt RCU				Knekt room control unit				750.00								

Labor Details - Area - Labor Category by Phase									
Labor Categories by Phase	Labor Categories by Areas	Labor Categories by Discipline	Ace Matthews All Creative Enterprises Home Automation 1270.1-1.100						Done
Grand Total - Labor Category by Phase									
Labor Category	Phase 1 Prewire		Phase 2 Trim		Phase 3 Final		Total		
	Time	Amount	Time	Amount	Time	Amount	Time	Amount	
1 - Installation	4:35:00	\$275.00	5:10:00	\$310.00	18:05:00	\$1,085.00	27:50:00	\$1,670.00	
2 - Programming					4:00:00	\$320.00	4:00:00	\$320.00	
3 - Training					2:05:00	\$208.33	2:05:00	\$208.33	
4 - Parts Labor			1:00:00	\$50.00	2:30:00	\$125.00	3:30:00	\$175.00	
5 - Wire Labor - Bulk	21:15:00	\$1,275.00			0:20:00	\$20.00	21:35:00	\$1,295.00	
6 - Wire Labor - Precut					1:30:00	\$90.00	1:30:00	\$90.00	
Grand Total	25:50:00	\$1,550.00	6:10:00	\$360.00	28:30:00	\$1,848.33	60:30:00	\$4,258.33	
Zone 1 - Home Theater									
Labor Category	Phase 1 Prewire		Phase 2 Trim		Phase 3 Final		Total		
	Time	Amount	Time	Amount	Time	Amount	Time	Amount	
1 - Installation	0:30:00	\$30.00	1:30:00	\$90.00	4:40:00	\$280.00	6:40:00	\$400.00	
2 - Programming					1:00:00	\$80.00	1:00:00	\$80.00	
3 - Training					1:35:00	\$158.33	1:35:00	\$158.33	
4 - Parts Labor			0:15:00	\$12.50	0:30:00	\$25.00	0:45:00	\$37.50	
5 - Wire Labor - Bulk	6:15:00	\$375.00			0:05:00	\$5.00	6:20:00	\$380.00	
6 - Wire Labor - Precut					0:30:00	\$30.00	0:30:00	\$30.00	
Home Theater	6:45:00	\$405.00	1:45:00	\$102.50	8:20:00	\$578.33	16:50:00	\$1,085.83	
Zone 2 - Living Room									
Labor Category	Phase 1 Prewire		Phase 2 Trim		Phase 3 Final		Total		
	Time	Amount	Time	Amount	Time	Amount	Time	Amount	
1 - Installation					8:30:00	\$510.00	8:30:00	\$510.00	
2 - Programming					0:45:00	\$60.00	0:45:00	\$60.00	
3 - Training					0:30:00	\$50.00	0:30:00	\$50.00	
4 - Parts Labor					0:15:00	\$12.50	0:15:00	\$12.50	
5 - Wire Labor - Bulk	4:22:30	\$262.50					4:22:30	\$262.50	
6 - Wire Labor - Precut					0:30:00	\$30.00	0:30:00	\$30.00	
Living Room	4:22:30	\$262.50			10:30:00	\$662.50	14:52:30	\$925.00	

Enhancement - Proposals & Projects/Labor Details: Phase - Labor Category by Phase

All Proposal and Project Labor Details have been consolidated, such as Hourly Rates by Category, Degree of Difficulty, Labor Time - Amounts by Install Phase, Labor Meter.

Labor by Phase, Area & Discipline can be accessed from the Labor Details button on the main Proposal/Project-Detail by Area screen.

Discipline				Area				Phase				Proposal - Detail by Area				Utilities		Home	
Client		Areas		Area Text		Home Entertainment System 1267.1-1.100						Pricing		Invoicing		Leave			
Project	Info	Products		Overviews								Payments		Purchasing		Tracker			
Contact	Log	Supplements		Install Notes								Project Fees		Work Orders		Print Menu			
Client Mode <input type="checkbox"/>		Labor Details		Super Views								QV		Wire Manager		Change Orders		Grand Total	
Discipline : Category : Type				Qty Make : Model				Description				Area & Product Totals							
Home Entertainment System																			
Bedroom 2 38,818.65																			
Audio : Multi-room : Switcher				1 ea Crestron : AADS				Adagio Audio Distribution System				2,500.00							
Audio : Multi-room : Switcher				2 ea Crestron : AADS				Adagio Audio Distribution System				5,000.00							
Audio : Multi-room : Keypad				1 ea Linn : 5100 Personal Handset				Universal learning remote				390.00							
Audio : Amplifier : Multi-channel				1 ea Linn : 5125				Five channel power amplifier (Black)				2,750.00							
Audio : Speaker : Bookshelf				5 pr Linn : Katan				Bookshelf loudspeakers: pair				4,975.00							
Audio : Speaker : Powered Subwoofer				1 ea Linn : Melodik				Aktive isobarik bass extension				4,950.00							
Video : Display : DLP Video Projector				1 ea Runco : CL-610				DLP Projector				7,995.00							
Video : Source : DVD Player				1 ea Sony : DVP-NS999ES				Progressive Scan DVD Player				1,099.95							
Automation : Control : Keypad				1 ea Linn : Knekt RCU				Knekt room control unit				750.00							

5 Proposal - Labor Details - Phase - Labor Category by Phase										Print		Home			
Labor Categories by Phase		Labor Categories by Areas		Labor Categories by Discipline		Ace Matthews All Creative Enterprises Home Automation 1270.1-1.100				Labor Meter		Proposal Detail			
Installation Type: New-3 Phase Pre-Trim-Final															
Hourly Labor Rates															
<u>Labor Category</u>		<u>Sell</u>		<u>Cost</u>		<u>Degree of Difficulty</u>									
Installation		60.00		30.00		1 - Prewire		0%							
Programming		80.00		40.00		2 - Trim		0%							
Training		100.00		50.00		3 - Final		0%							
Parts Labor		50.00		30.00		Parts Time - per each		0:15:00 h:m:s							
Wire Labor - Bulk		60.00		35.00		Bulk Wire Time - per foot		0:00:30 h:m:s							
Wire Labor - Precut		60.00		40.00		Pre Cut Wire Time - per pair		0:00:30 h:m:s							
Time = hrs:min:sec															
Labor Categories by Phase															
		Phase 1 Prewire		Phase 2 Trim		Phase 3 Final		Total							
Labor Category		Time		Amount		Time		Amount		Time		Amount		GP%	
1 - Installation		4:35:00		\$275.00		5:10:00		\$310.00		18:05:00		\$1,085.00		27:50:00 \$1,670.00 50.0%	
2 - Programming										4:00:00		\$320.00		4:00:00 \$320.00 50.0%	
3 - Training										2:05:00		\$208.33		2:05:00 \$208.33 50.0%	
4 - Parts Labor						1:00:00		\$50.00		2:30:00		\$125.00		3:30:00 \$175.00 40.0%	
5 - Wire Labor - Bulk		21:15:00		\$1,275.00						0:20:00		\$20.00		21:35:00 \$1,295.00 41.7%	
6 - Wire Labor - Precut										1:30:00		\$90.00		1:30:00 \$90.00 33.3%	
Total		25:50:00		1,550.00		6:10:00		360.00		28:30:00		1,848.33		60:30:00 \$4,258.33 46.7%	

Enhancement - Proposals/Print Menu/Projects: Print Phase, Area & Discipline Labor - Category by Phase

Labor by Phase, Area & Discipline Reports can also be accessed from the Labor Summary Reports section of the Proposal/Print Menu/Projects screen.

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

PDF reDirect Pro v2, winspool, Ne01: **Ace Matthews** | **All Creative Enterprises** | **Home Automation** | **1270.1-1.100** | **Done**

Proposals | **Projects** | **Costing** | **Purchasing** | **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 Purchase Order Summary

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

Project Install Notes

- Project Install Notes
-Overview
-Area Text Install Notes
-Product Install Notes

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

Items must have Phase Number/Names

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

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
- 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

Labor Summary Reports

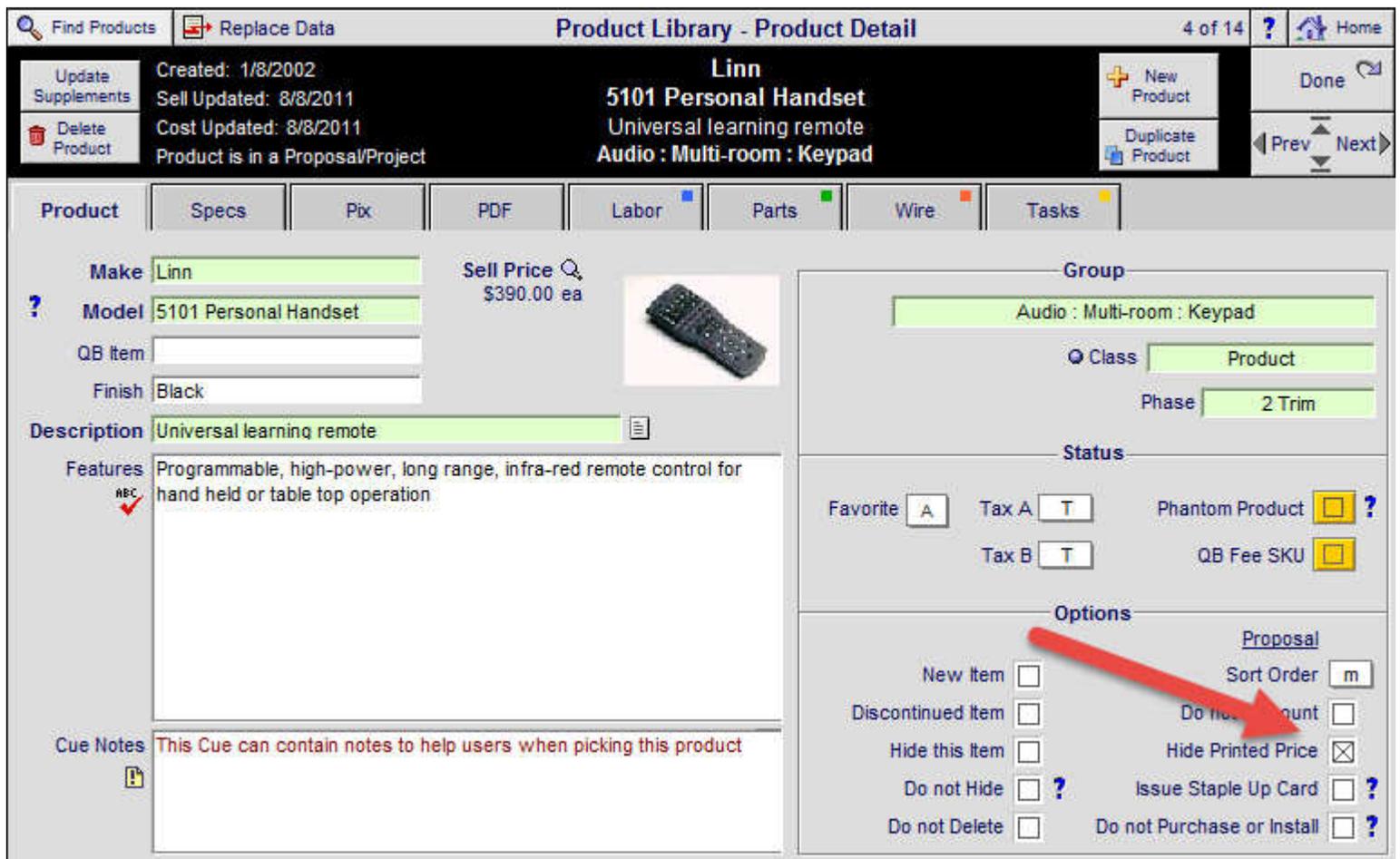
- Labor Categories by Phase
- Labor Categories by Discipline
- Labor Categories by Areas

Enhancement - Proposals/Product Detail: Hide Printed Price

You now have the ability to Hide the Printed Sell Price of Products in a Proposal from the Proposal Product Detail screen.

You can check a Product in the Product Library to Hide the Printed Price and it will be hidden when you bring that Product into a Proposal. Or you can go into a Proposal can check or uncheck this option on each Product.

The Hide Printed Price option overrides the Show Pricing Option selection in the Print Menu/Print Options screen for the checked product.



The screenshot shows the 'Product Library - Product Detail' interface for the 'Linn 5101 Personal Handset'. The product is a 'Universal learning remote' with a 'Sell Price' of \$390.00 ea. The 'Options' section is expanded, and the 'Hide Printed Price' checkbox is checked. A red arrow points to this checkbox. Other options include 'New Item', 'Discontinued Item', 'Hide this Item', 'Do not Hide', 'Do not Delete', 'Proposal Sort Order', 'Do not Purchase or Install', 'Issue Staple Up Card', 'Phantom Product', and 'QB Fee SKU'. The 'Status' section includes 'Favorite', 'Tax A', 'Tax B', and 'QB Fee SKU'. The 'Group' section includes 'Class' and 'Phase'. The 'Description' section includes 'Universal learning remote' and 'Features: Programmable, high-power, long range, infra-red remote control for hand held or table top operation'. The 'Cue Notes' section includes 'This Cue can contain notes to help users when picking this product'.

You can cycle through this screen using the Prev Next button and then check the Products you want to hide.

You can also go to the Products list screen and click on the Area you want and then click on the View icon (on a Product) to take you to this screen and cycle through all of the Products in the selected Area.

Or you can go to the Proposal/Products screen and check the items that you want to hide.

Delete Product		Client Mode <input type="checkbox"/>	Proposal - Product Detail			2 of 7	Reset Labor	Home
Areas		Text	Hayes Callahan 1283.1-1.100			Proposal Detail		
Labor		Parts	Wire	Tasks	Linn : Katan			Prev Next
		Audio : Speaker : Bookshelf						
Product		Specs	Pix - PDF's	Labor	Parts	Wire	Tasks	1 - Home Theater
Qty	5							
Make	Linn		Sell Price					
Model	Katan		\$995.00 pr					
SKU								
Finish	Black							
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		Audio : Speaker : Bookshelf						
Change Group	Original Group	Audio						
Product Classification		Product						
Primary Install Phase		3 Final						
Tax A		T	+	Tax B		T		
Do not Discount		<input type="checkbox"/>	Product Sort		m			
Exclude \$ from Totals		<input type="checkbox"/>	Discontinued Item		<input type="checkbox"/>			
Show Product as Option		<input type="checkbox"/>	Issue Staple Up Card		<input type="checkbox"/>			
Do not Purchase or Install		<input type="checkbox"/>	?	Hide Printed Price		<input checked="" type="checkbox"/>		
Purchasing								
Purchasing Days		7						
Default Vendor		Linn Products						
Alt PO Vendor		?						
Alt PO Cost								
Use Alt	<input type="checkbox"/>							

View	Option	Qty	Zone - Area	Make	All 27 Products	Product Labor	Unit List	Unit Sell	Ext Sell
Tag	No \$		Discipline	Category	Model	Parts Labor	Unit Cost	Unit Sell	Ext Installed
Del	No Disc	Switch Change Product Group	Phase	Type	Description	Wire Labor	Updated	GP%	Ext Discount
		<input type="checkbox"/>	1 ea	1 - Home Theater	Linn	5125	80.00	2,612.50	2,612.50
			3 Final 1269.1	Amplifier	Five channel		1,650.00	2,750.00	2,830.00
		<input type="checkbox"/>	5 pr	1 - Home Theater	Linn	Katan	287.50	945.25	4,726.25
			3 Final 1269.1	Speaker	Bookshelf loudspeakers:		597.00	995.00	5,262.50
		<input type="checkbox"/>	1 ea	1 - Home Theater	Linn	Melodik	130.00	4,702.50	4,702.50
			3 Final 1269.1	Powered Subwoofer	Aktive isobarik bass		2,970.00	4,950.00	5,080.00
		<input type="checkbox"/>	1 ea	1 - Home Theater	Runco	CL-610	110.00	7,595.25	7,595.25
			3 Final 1269.1	DLP Video Projector	DLP Projector		4,797.00	7,995.00	8,105.00
		<input type="checkbox"/>	1 ea	1 - Home Theater	Sony	DVP-NS999ES	35.00	1,044.95	1,044.95
			3 Final 1269.1	DVD Player	Progressive Scan DVD		620.40	1,099.95	1,134.95

Qty Ext. Price

AUDIO

Linn : 5125 : Five channel power amplifier (Black) : Silver 1 ea \$2,750.00

Linn : Katan : Bookshelf loudspeakers: pair : Black 5 pr

Linn : Melodik : Aktive isobarik bass extension loudspeaker : Black 1 ea \$4,950.00

VIDEO

Runco : CL-610 : DLP Projector 1 ea \$7,995.00

Sony : DVP-NS999ES : Progressive Scan DVD Player : Black 1 ea \$1,099.95

AUTOMATION

Linn : Knekt RCU : Knekt room control unit : White 1 ea \$750.00

Linn : 5101 Personal Handset : Universal learning remote : Black 1 ea \$390.00

Enhancement - Proposals/Areas & Products: No Pick Product Prompt (when adding Areas)

The "No Pick Product Prompt" (when adding Areas) checkbox is Proposal specific, which means it can be turned on or off and the setting will stay intact for that Proposals.

The screenshot shows the 'Proposal - Areas & Products' window for 'Mike & Judy Hammerstad'. The 'No Prompt' checkbox is checked in the top toolbar. A message dialog box is displayed, indicating that adding areas prompts the user to add products and supplements. The dialog box has a 'Prompt' button and a 'Cancel' button.

Users can also choose to have **All** of their Proposals default to "No Pick Product Prompt", when adding Areas, by checking this box in the Master Preferences/Users/Access Rights screen.

The screenshot shows the 'Do Not Allow if Checked' Access Rights screen. The checkbox 'No "Pick Product Prompt" when Adding Areas' is checked, indicating that this prompt will be disabled for all proposals.

Enhancement - Proposal/Fees: Improve Fees Screens, Print Options

All Fees screens have been improved to more clearly show the Fees Totals when Fees are Directed to the Parts or Labor Subtotals. The Option to Hide the Fees Directed to Parts and Labor on the Proposal Fees Report is also now on this screen along with the User definable Labels.

Report Header **Additional Fees**
Proposal - Project Fees
Print ? Home

Ace Matthews
All Creative Enterprises
Home Automation
1270.1-1.100

Replace All Fees with Default Fees
Done

Projects

Services

Expenses

New Project Fees

Pick	Sort	Project Fee Type	Phase	Description	Fee Type	Percentage Percent of	Flat Fee Sell Amount	Cost % of Fee	Tax Status A B	Fee Total	Direct to Parts Subtotal
<input checked="" type="checkbox"/>		Design/Engineering	1	Design and Engineering of the following electronic systems: Home	Percentage	Equipment 5.0 %		50 %	E E	\$2,052.34	<input checked="" type="checkbox"/>
<input type="checkbox"/>		Documentation	2	Digital Photos of the prewire and final installation taken, cataloged and	Flat Fee		\$25.00	50 %	E E		<input type="checkbox"/>
<input type="checkbox"/>		Misc Parts & Materials	1	Misc Parts and Materials required to complete the installation.	Percentage	Labor 5.0 %		50 %	E E		<input type="checkbox"/>
<input checked="" type="checkbox"/>		Project Management	3	Meetings designed to facilitate the seamless integration of the electronic	Percentage	Grand Total 3.0 %		50 %	E E	\$1,600.00	<input type="checkbox"/>

Projects Fees (Excluding Fees Directed to Parts)	\$1,600.00
Fees Directed to Parts	\$2,052.34
Total Projects Fees	\$3,652.35

Percentage of "Grand Total" does not include Parts, Fees or Tax.

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

Fee SKU Number comes from Products in the Product Library flagged as a Fee.

Total All Fees (Excluding Fees Directed to Parts & Labor)	\$4,992.35
Total All Fees (Including Fees Directed to Parts & Labor)	\$4,992.35

Fees Report - Fees To Parts Display

Hide Parts Total on Fees Report (show in Grand Total)

Optional Label

Part Fees: ▶ Part Fees: \$2,052.34

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All Creative Enterprises
Home Automation
1270.1-1.100

Done

Projects Services Expenses

+ New Technical Services

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



Services Fees (Excluding Fees Directed to Labor) \$600.00
 Fees Directed to Labor \$500.00
Total Services Fees \$1,100.00

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

Fees directed to the Parts or Labor Subtotals do not have Disciplines or Areas and will not be added into these Subtotals

Total All Fees (Excluding Fees Directed to Parts & Labor) \$2,940.00
Total All Fees (Including Fees Directed to Parts & Labor) \$4,992.35

Fees Report - Fees to Labor Display

Hide Labor Total on Fees Report (show in Grand Total)

Optional Label

Labor Fees: Labor Fees: \$500.00



Enhancement - Proposal/Print Menu: Improve Print Options screens

Both the Master Preferences/Print Options and the Proposal/Print Menu/Print Option screens have been improved for better clarity and they are both the same. The Fee Report options have been moved under the Areas & Products Pricing section.

Printer Setup | PDF reDirect Pro v2,winspool,Ne01: | **Proposal/Project Prefs - Print Options** | ? Home

Ace Matthews
All Creative Enterprises
Home Automation
1270.1-1.100

Push Contract Lines | Done

Company Location

EME audio & video Company Location
1
EME Audio & Video Systems

Contract

Default: Use Contract 1 Contract 1
 Use Contract 2 Contract 2
 Use Contract 3
 Use Contract 4
 Use Contract 5

Subtotals

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

Price Expiry Notice

Do not show Price Expiry Notice Do Not Show Date

List Price & Discount

Yes No Show List Price & Discount

Sales Tax

Yes No Show Sales Tax
Show Tax Totals

Warranty Terms

Factory Extended

Extended Warranty Approval - Decline

Show Extended Warranty Approve/Decline Option

Areas & Products Report - Formatting

Yes No Page Break after each Area

Products - Do not Sort products by Discipline
 Products - Show Product Install Notes
 Hide Area Text
 Show Area Text - No Products
 Sort Areas by: Zone/Location/Placement/Area
Normal Sort = Location/Zone/Placement/Area
 Hide Footer Initials Initials _____

Areas & Products and Supplement Reports - 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

Features Text

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

Pictures

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

Fees Report - Pricing

Yes No Show Fees Item Prices
 Yes No Show Fees Sub & Grand Totals
No = Parts & Labor Totals - Directed Fees will not Show

Fees Report - Parts and Labor Totals - Directed to Fees

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

Overviews - Page Breaks

Page Break after each Overview

Labor Listing

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

Report Footers

Use Salesman's Email instead of Shop Email in Footer

Project Shop - Staging Reports

Hide Pricing on Shop Staging Reports

Enhancement - Proposal/Print Menu/Print Option: Fees & Supplement Reports: Hide Pricing

If you want to **Hide the Pricing** on the **Area and Products** and the **Supplement reports**, you would check the Hide Sell Price option.

If you want to **Hide All of the Pricing** on the **Fees Report**, you would check "No" in the Fees Report - Pricing Section.

If you want to **Only Hide the Fees Directed to Parts or Labor** on the **Fees Report**, you would check "No" in the Fees Report - Pricing Section.

Printer Setup | Proposal/Project Prefs - Print Options | Home

PDF reDirect Pro v2,winspool,Ne01: | Mike & Jessica Potter | Push Contract Lines | Done

Security System 1282.1-1.100

Company Location
Company Location: 1
EME Audio & Video Systems

Contract
Default: Use Contract 1 Contract 1
 Use Contract 2 Contract 2
 Use Contract 3
 Use Contract 4
 Use Contract 5

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

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

List Price & Discount
 Yes No Show List Price & Discount

Sales Tax
 Yes No Show Sales Tax
Show Tax Totals

Warranty Terms
 Factory Extended

Extended Warranty Approval - Decline
 Show Extended Warranty Approve/Decline Option

Overviews - Page Breaks
 Page Break after each Overview

Labor Listing
 Do not show Labor Hours on Proposal Reports
 Do not show DOD on Labor Detail Report

Report Footers
 Use Salesman's Email instead of Shop Email in Footer

Project Shop - Staging Reports
 Hide Pricing on Shop Staging Reports

Company Location
EME audio & video
Company Location: 1
EME Audio & Video Systems

Areas & Products Report - Formatting
 Yes No Page Break after each Area
 Products - Do not Sort products by Discipline
 Products - Show Product Install Notes
 Hide Area Text
 Show Area Text - No Products
 Sort Areas by: Zone/Location/Placement/Area
Normal Sort = Location/Zone/Placement/Area
 Hide Footer Initials Initials _____

Areas & Products and Supplement Reports - 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

Features Text
 All Areas & Products Report
 None Product Summary Report (recommended)

Pictures
 All Areas & Products Report
 None Product Summary Report (recommended)

Fees Report - Pricing
 Yes No Show Fees Item Prices
 Yes No Show Fees Sub & Grand Totals
No = Parts & Labor Totals - Directed Fees will not Show

Fees Report - Parts and Labor Totals - Directed to Fees
 Hide - Parts Directed Fees - Label & Amount
 Hide - Labor Directed Fees - Label & Amount

Send Email 
 Client Manager
 Salesman Engineer

Prefs
Print Options

Security System
1282.1-1.100

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

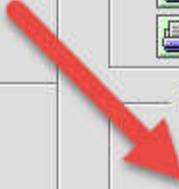
-  Discipline
-  Area
 -  Products & Only Labor
 -  Products & Supplements without Prices
-  Area by Phase
-  Phase

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



Additional Fees

Design/Engineering

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.

Project Management

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

Supplemental Parts Summary

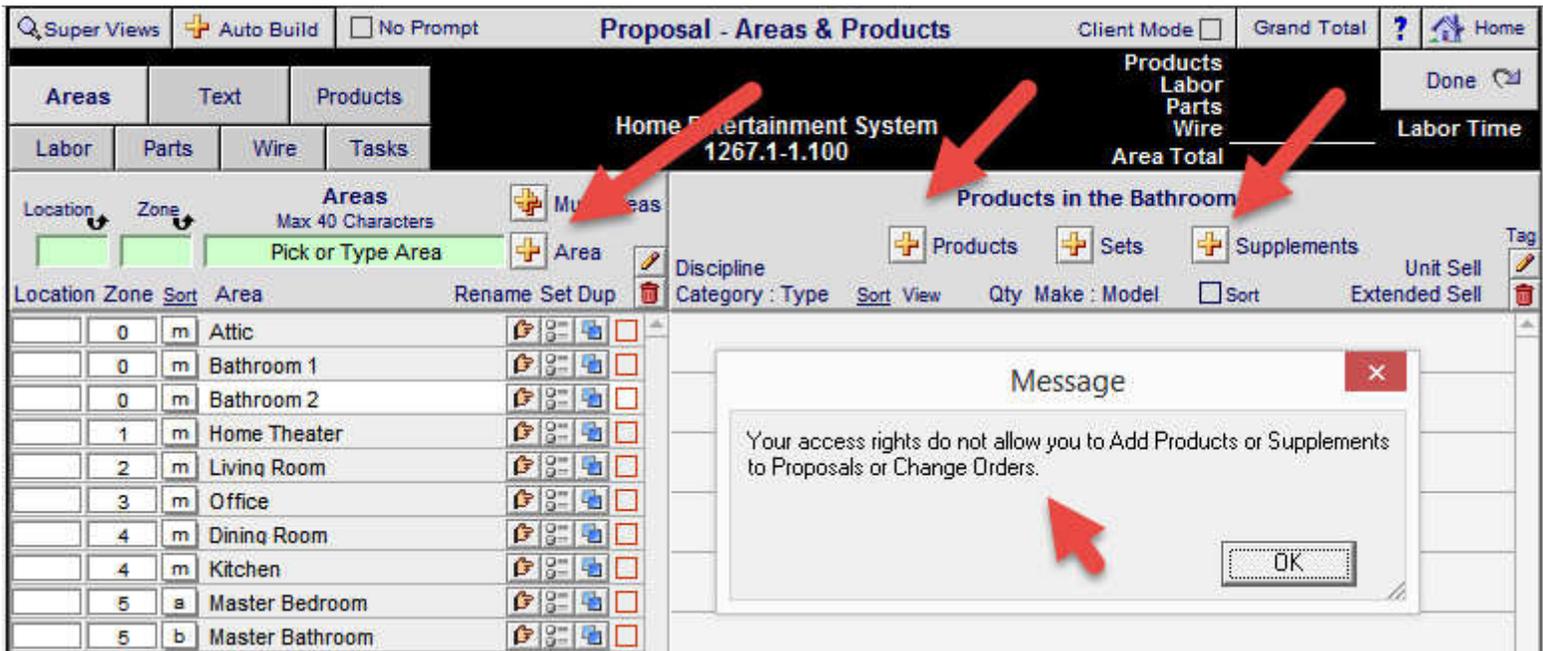
Make - Model	Description	Total Qty
Linn : IR Repeater	Infra-red extension for RCU or main system	2
Linn : Knekt RCU Metalwork	Back box	2
Linn : Phono Plugs-Standard	Pack 6 red/6 black standard phono plugs	2

Enhancement - Master Prefs/Users/Access Rights: Do Not Add Products to Proposals or Change Orders

A new User Access Rights option has been added, that prevents Users from Adding Products or Supplements to a Proposal or Change Order.

Users can still add Areas.

Check All	UnCheck All	User Access Rights		Sort Users	◀Prev/Next▶	?	Home
User Assignable Favorites <input type="checkbox"/> Empty = "Global" Fav's		No "Add Product" Prompt <input type="checkbox"/> ?	Dave Dowling CAD Operator Checked boxes have Access Rights Unchecked boxes do not have Rights	PC Screen Size <input type="text"/>		?	Done
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		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 - Projects - Completed Archives - Change Orders <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/> Duplicate		Point of Sale <input checked="" type="checkbox"/> Delete/Archive Invoices <input checked="" type="checkbox"/> Invoice Product Sell Price <input checked="" type="checkbox"/> Purchase Order Access			
"Do Not Allow if Checked" Access Rights							
<input type="checkbox"/> Do not allow Access to the Proposal Preferences screen		<input checked="" type="checkbox"/> Do not allow Adding Products or Supplements to Proposals					
<input type="checkbox"/> Do not allow Access to the Proposal Print Option screen		<input type="checkbox"/> Do not allow Sell Price Less than Minimum Sell					
<input type="checkbox"/> Do not allow Access to SCPS Allow only CP access		<input type="checkbox"/> Do not "Pick Product Prompt" when Adding Areas					



Enhancement - Product Library/Product Detail screen: Optimize screen Layout GUI

The Product Library/Product Detail screen has been re-organized for better comprehension.

Options: All option that affect the Product once it is entered into a Proposal are on the right side of the options section.

Inventory data is now under the Pricing section.

Some changes have also been made to the Specs screen. The Quickbooks and RCMS Accounts and the Product Validation information have been moved to the Specs screen.

Update Supplements Created: 1/8/2002 New Product Done

Delete Product Sell Updated: 8/8/2011 Duplicate Product Prev Next

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

Product Specs Pk PDF Labor Parts Wire Tasks

Make **Linn** Sell Price **\$390.00 ea**
 Model **5101 Personal Handset**
 QB Item
 Finish **Black**
 Description **Universal learning remote**
 Features **Programmable, high-power, long range, infra-red remote control for hand held or table top operation**
 Cue Notes **This Cue can contain notes to help users when picking this product**



Group
Audio : Multi-room : Keypad
 Class **Product**
 Phase **2 Trim**
Status
 Favorite **A** Tax A **T** Phantom Product ?
 Tax B **T** QB Fee SKU
Options
 Proposal
 New Item Sort Order **m**
 Discontinued Item Do not Discount
 Hide this Item Hide Printed Price
 Do not Hide ? Issue Staple Up Card ?
 Do not Delete Do not Purchase or Install ?

Unit **ea** Product **Linn**

Net Price	Adjustment Type	%	Loaded Price
Sell \$390.00			Sell \$390.00
Minimum Sell \$300.00	GP 22.0%	%	Cost \$234.00
Net Cost \$234.00			GP% 40.0%

Purchasing

Default PO Vendor **Linn Products Ltd** Default PO Cost **\$234.00**
 Use Alt Alternate PO Vendor ? Alt PO Cost ?
 Optional Vendor Hold ? Opt PO Cost ?
 Product Description (Purchase Order) ?

Product & Supplements

	Product	Parts	Wire	Installed Price
Sell	\$390.00	\$2,815.00	\$702.00	Sell \$3,907.00
Labor	\$520.00	\$125.00	\$130.00	Labor \$775.00
Total	\$910.00	\$2,940.00	\$832.00	Total \$4,682.00
				GP% 42.1%

[View Product, Parts, Wire & Labor Costs](#)

Package Option ? Enable Global Buy Pkg Off
 Buy Pkg Buy Pkg Cost
 Buy Pkg Qty ea

Inventory

Delivery Lead Time **7** Days
 Quantity On-Hand **10**
 Optimum Qty **6**
 Order Qty **0**

Qty	Cost Value
Quantity On-Hand 10	\$2,340.00
Optimum Qty 6	\$1,404.00

Work Orders

Alternate Product Listing (Work Order & Wire Mgr) ?
 Permanent - Product Install Notes (Work Order)

Enhancement - Product Library/Detail List: Add and Sort by Creation Date

From the Product Library/Detail List screen you can now see the Product Creation Date and if you click on the underlined label, you can choose to Sort in Ascending or Descending Order.

The screenshot shows the 'Product Library - Detail List' interface. At the top, there are search and navigation tools. Below that, a list of products is displayed with columns for Dept, Cat, Type, Created, Class, View, Make, Model, SKU, Description, Finish, Notes, Price, and Fav. A message box is overlaid on the screen, containing the text: 'Sort by Created Date in Ascending or Descending Order.' Below the text are two buttons: 'Descending' and 'Ascending'. Red arrows point from the 'Created' column header to the message box and from the 'Ascending' button to the 'Created' column header.

Enhancement - POS/PO screen: Increase PO Number field size

The PO# field size has been increased to display both the SCPS PO number and the User assigned PO number.

The screenshot shows the 'POS - Purchase Order List' interface. At the top, there are search and navigation tools. Below that, a table of purchase orders is displayed. The table has columns for PO #, Company, Date, Reference, Buyer, P.O. Status, P.O. Amount, and Archive. A red arrow points to the PO # field, which now displays both the SCPS PO number and the User assigned PO number.

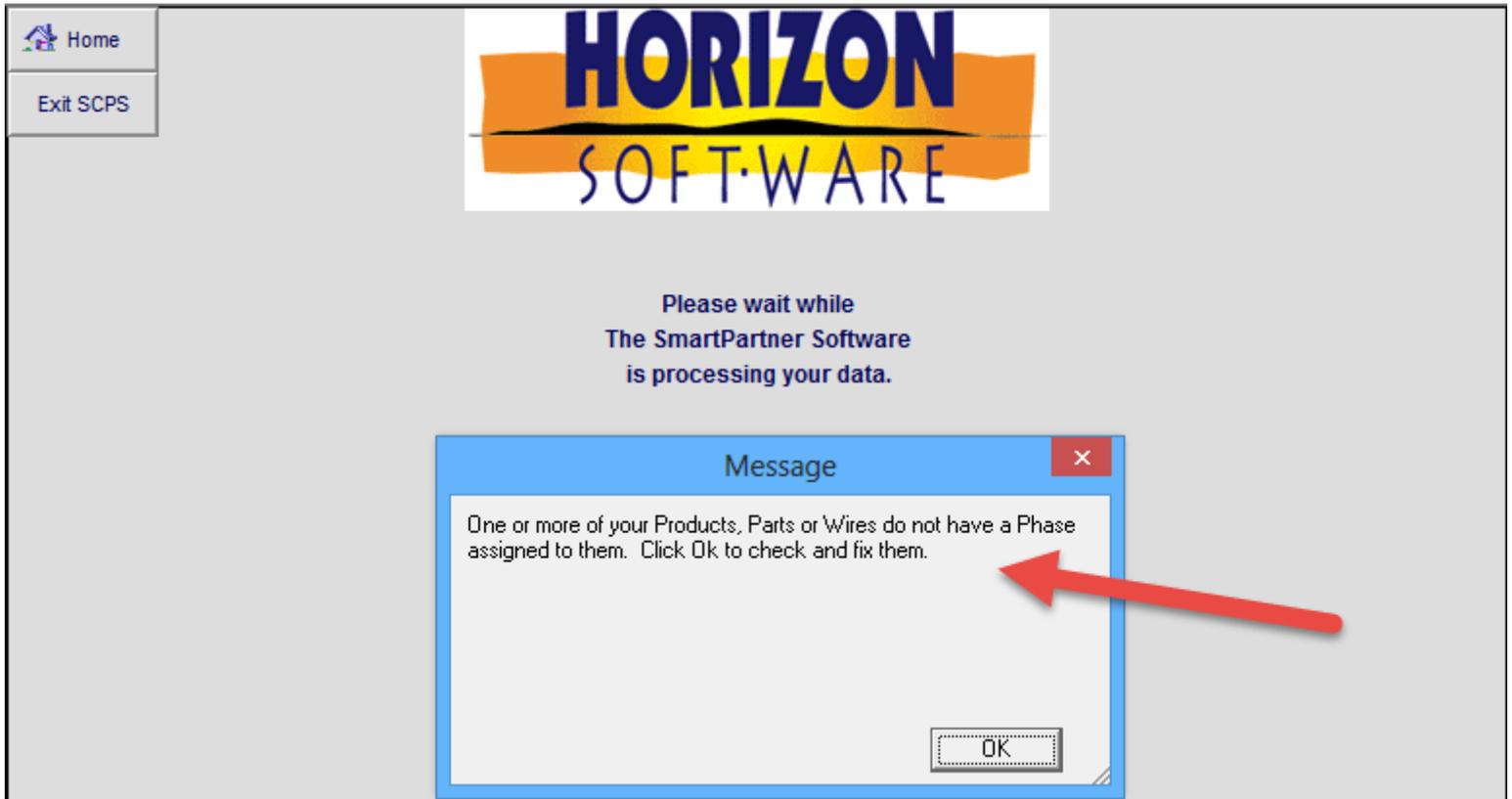
PO #	Company	Date	Reference	Buyer	P.O. Status	P.O. Amount	Archive
PO #7193 - 123456789	BTX	9/29/2005		Tina	Open	31.90	<input type="checkbox"/>
PO #7187	Precor	9/28/2005	Lipson	Chad Trude	Open	0.00	<input type="checkbox"/>

Enhancement - Proposal/Project: Phase Safety Check & Set Phase Screens

When entering the Print Menu, SCPS does a quick check to make sure that all Products, Parts and Wire records have a Phase assigned to them. This ensures that the Proposals and other Reports that require Phases will print properly.

Discipline				Area				Phase				Proposal - Detail by Area				Utilities		Home			
Client				Areas				Area Text				Pat Klise Capitol Sales Company Home Entertainment System 1267.1-1.100				Pricing		Invoicing		Leave	
Project		Info		Products		Overviews		Payments		Purchasing						Tracker					
Contact		Log		Supplements		Install Notes		Project Fees		Work Orders						Print Menu					
Client Mode <input type="checkbox"/>		Labor Details		Super Views		QV		Wire Manager		Change Parts						Grand Total					
Discipline : Category : Type				Qty Make : Model				Description				Area & Product Totals									
Home Entertainment System																					
Bedroom 2														38,818.65							
Audio : Multi-room : Switcher				1 ea		Crestron : AADS		Adagio Audio Distribution System				2,500.00									
Audio : Multi-room : Switcher				2 ea		Crestron : AADS		Adagio Audio Distribution System				5,000.00									
Audio : Multi-room : Keypad				1 ea		Linn : 5101 Personal Handset		Universal learning remote				390.00									
Audio : Amplifier : Multi-channel				1 ea		Linn : 5125		Five channel power amplifier (Black)				2,750.00									
Audio : Speaker : Bookshelf				5 pr		Linn : Katan		Bookshelf loudspeakers: pair				4,975.00									

If a Phase is not assigned to a Product, Part or Wire record, you will receive this warning message and when you click OK you will be sent to the Phase management screen.



Any Products that don't have a Phase assigned will be sorted to the top of the list so that you can easily assign a Phase from the pop list.

You can also sort by Phase, Product or Zone - Area

Sort by Phase		Product Phase - All - 33 Products			Home
Sort by Product		Pat Klise Capitol Sales Company 1267.1-1.100			Leave
Qty	Phase	Product Make : Model	Finish	Zone - Area	CO#
1 ea		Linn : 5101 Personal Handset	Black	1 - Home Theater	
1 ea	1 Prewire	Linn : Knekt RCU	White	4 - Dining Room	
1 ea	1 Prewire	Linn : Knekt RCU	White	4 - Kitchen	
1 ea	1 Prewire	Linn : Knekt RCU	White	5 - Master Bedroom	
1 ea	1 Prewire	Linn : Knekt RCU	White	3 - Office	
1 ea	1 Prewire	Crestron : AADS	Black	Bedroom 2	
1 ea	2 Trim	Linn : Knekt RCU	White	1 - Home Theater	
1 pr	2 Trim	Linn : Diskreet-Rd	White	4 - Dining Room	

Clicking on the Parts tab shows all of the Parts in the Proposal/Project

Sort by Phase		Parts Phases - All - 21 Parts				▼ ▲ ▾ ▿ ?	
Sort by Part		Pat Klise Capitol Sales Company 1267.1-1.100				Done	
PO Products	PO Parts	PO Wire	Orphan		Parts		
Qty	Phase	Part Make : Model	Part Assigned to Product...	Finish	Zone - Area	CO#	
1 ea	1 Prewire	Linn : Aktiv Modules	Linn : 5101 Personal Handset	Black	Bedroom 2		
1 ea	2 Trim	Linn : Knekt RCU Metalwork	Linn : Knekt RCU	White	1 - Home Theater		
1 ea	2 Trim	Linn : Knekt RCU Metalwork	Linn : Knekt RCU	White	4 - Dining Room		
1 ea	2 Trim	Linn : Knekt RCU Metalwork	Linn : Knekt RCU	White	4 - Kitchen		

Clicking on the Wire tab shows all of the Wires in the Proposal/Project

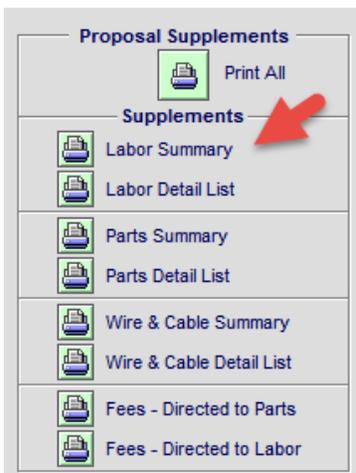
Sort by Phase		Wire Phases - All - 66 Wires				▼ ▲ ▾ ▿ ?	
Sort by Wire		Pat Klise Capitol Sales Company 1267.1-1.100				Done	
PO Products	PO Parts	PO Wire	Orphan		Wire		
Qty	Phase	Wire Make : Model	Wire Assigned to Product...	Finish	Zone - Area	CO#	
150 ea	1 Prewire	Linn : K10 Cable	Linn : 5101 Personal Handset	Black	1 - Home Theater		
150 ea	1 Prewire	Monster : CAT5 Bulk	Linn : Knekt RCU	White	1 - Home Theater		
1 ea	1 Prewire	Linn : CAT5-40m	Linn : Knekt RCU	White	1 - Home Theater		
1 ea	1 Prewire	Linn : Black Interconnect	Linn : Classik Movie Di	Black	2 - Living Room		

You can also access the Product Phases module from the Product List in a Proposal or Project.

Super & Sum Views		Product Phases		<input type="checkbox"/> Clint Mode	Proposal - Products				Total \$86,945.84		Home					
Areas		Text		Products		Pat Klise Capitol Sales Company Home Entertainment System 1267.1-1.100		Auto Price Adjuster		Update All Products		Delete All Options		Done		
Labor		Parts		Wire		Tasks		Update Tagged Products		Switch Tagged Products		Product Install Notes				
View	Option	Qty	Zone - Area		Make		All 33 Products		Product Labor		Unit List		Unit Sell		Ext Sell	
Tag	No \$		Discipline		Category		Model		Parts Labor		Unit Cost		Unit Sell		Ext Installed	
Del	No Disc	Switch Change Product Group	Phase		Type		Description		Wire Labor		Updated		GP%		Ext Discount	
		1	ea	Bedroom 2	Crestron	AADS	Adagio Audio Distribution	45.00	3,000.00	2,500.00	2,500.00	2,500.00	2,545.00			
		2	ea	Bedroom 2	Crestron	AADS	Adagio Audio Distribution	90.00	3,000.00	2,500.00	2,500.00	2,500.00	5,090.00			
		1	ea	Bedroom 2	Linn	5101 Personal Handset	Universal learning remote	917.50	2,815.00	234.00	390.00	390.00	1,307.50			
		1	ea	Bedroom 2	Linn	5125	Five channel power	80.00	1,650.00	2,750.00	2,750.00	2,750.00	2,830.00			

Fix - Proposal/Print Menu: Print Labor Summary returns to Print Menu instead of Print Preview

After printing the Labor Summary report you now go back to the Print Menu screen instead of the Print Preview screen.



Fix - Proposal/Print Menu: Print Custom Reports returns to Print Menu instead of Payment Terms

After printing a Proposal using the Custom Reports option, you are now returned to the Print Menu screen instead of the Payment Terms screen.

Printer Setup | **PDF reDirect** | **Copy**

Proposal - Print Menu | **Custom Reports** | **Refresh**

PDF reDirect Pro v2, winspool,Ne01: | **Mike & Judy Hammerstad** | **Done**

Whole House Music System
1269.1-1.100

Client | Manager
 Salesman | Engineer

Proposals | **Projects** | **Costing** | **Purchasing**

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

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: 1269.1-1.100 Mike & Judy Hammerstad

Proposal Status:
User Print Cue:
Report Date: 9/10/2014 Date Lock
 Show "Cover Page & Contract" Watermark
 Show Print Dialog when printing
 Use Custom Proposal Layouts
Version SCPS 11.1v1

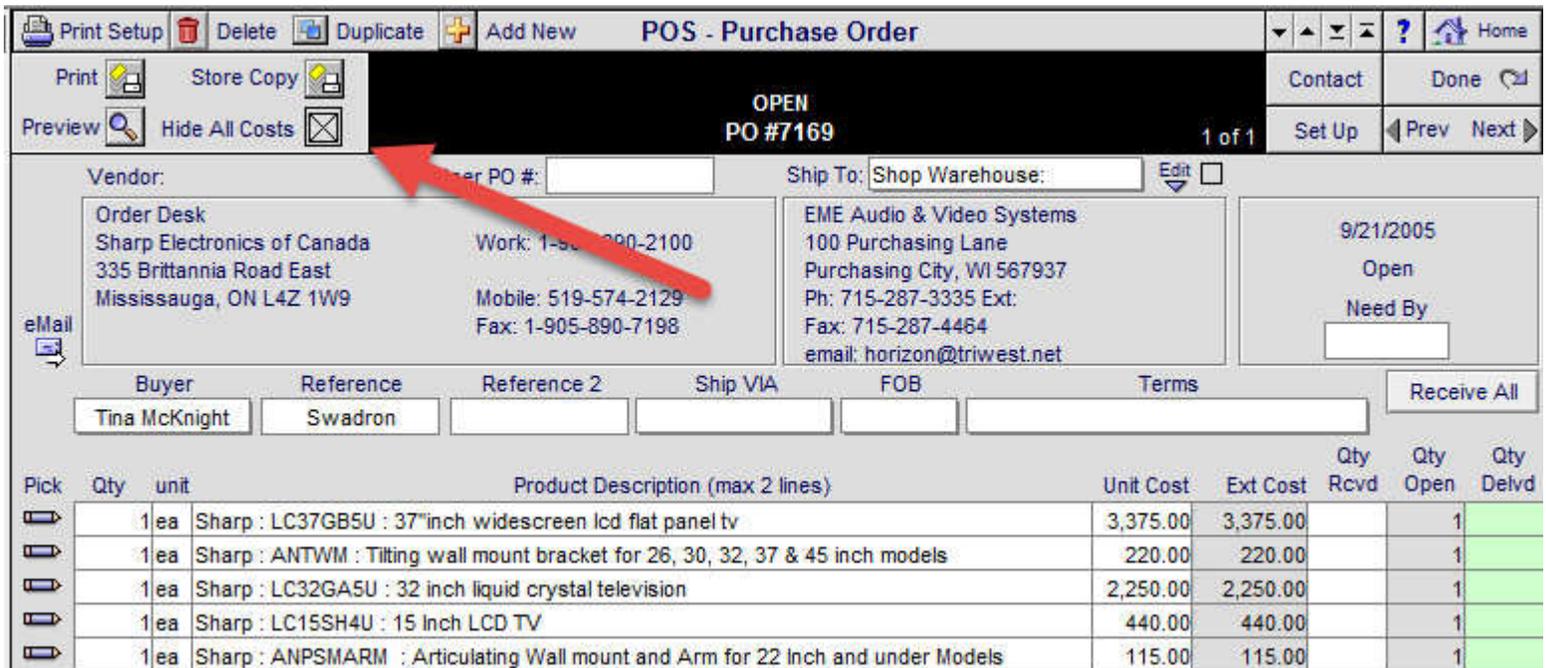
The Client Name & Project Number can be pasted into the PDF File Name field, by inserting the cursor and pressing Control & V

Fix - Project/Change Orders: Remove Prompt to Toggle CO

In some cases, when creating a Change Order in a Project you are no longer prompted to Toggle the CO between a Pending and Final CO. This has been fixed.

Fix - POS/Purchase Orders: Hide Printed Prices on all 100 Line Items

Clicking on the Hide Printed Prices checkbox now hides the prices, on all 100 line Items, on the Printed PO.



Print Setup Delete Duplicate Add New POS - Purchase Order

Print Store Copy Hide All Costs

Preview

OPEN PO #7169 1 of 1

Contact Done

Set Up Prev Next

Vendor: Order Desk Sharp Electronics of Canada 335 Britannia Road East Mississauga, ON L4Z 1W9

Work: 1-519-290-2100 Mobile: 519-574-2129 Fax: 1-905-890-7198

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

9/21/2005 Open Need By

Buyer Reference Reference 2 Ship VIA FOB Terms Receive All

Tina McKnight Swadron

Pick	Qty	unit	Product Description (max 2 lines)	Unit Cost	Ext Cost	Qty Rcvd	Qty Open	Qty Delvd
	1	ea	Sharp : LC37GB5U : 37"inch widescreen lcd flat panel tv	3,375.00	3,375.00		1	
	1	ea	Sharp : ANTWM : Tilting wall mount bracket for 26, 30, 32, 37 & 45 inch models	220.00	220.00		1	
	1	ea	Sharp : LC32GA5U : 32 inch liquid crystal television	2,250.00	2,250.00		1	
	1	ea	Sharp : LC15SH4U : 15 Inch LCD TV	440.00	440.00		1	
	1	ea	Sharp : ANPSMARM : Articulating Wall mount and Arm for 22 Inch and under Models	115.00	115.00		1	

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



Purchase Order

PO #7169

9/21/2005

Order Desk Sharp Electronics of Canada 335 Britannia Road East Mississauga, ON L4Z 1W9	Work: 1-905-890-2100 Mobile: 519-574-2129 Fax: 1-905-890-7198	EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 567937 Ph: 715-287-3335 Ext: Fax: 715-287-4464 email: horizon@trivest.net
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Need By	Reference	Ship To: Shop Warehouse:		
	Swadron			
Buyer	Reference 2	Ship VIA	FOB	Terms
Tina McKnight				

Qty	Description	Price	Total
1	ea Sharp : LC37GB5U : 37"inch widescreen lcd flat panel tv		
1	ea Sharp : ANTWM : Tilting wall mount bracket for 26, 30, 32, 37 & 45 inch models		
1	ea Sharp : LC32GA5U : 32 inch liquid crystal television		
1	ea Sharp : LC15SH4U : 15 Inch LCD TV		
1	ea Sharp : ANPSMARM : Articulating Wall mount and Arm for 22 Inch and under Models		

Fix - POS/Purchase Orders: Receive Qty on all 100 Line Items

Clicking on the "Receive All" button, now sets all 100 lines Items, on the PO, to the Order Qty.

Print Setup Delete Duplicate Add New POS - Purchase Order

Print Store Copy Preview Hide All Costs

CLOSED PO #7169 1 of 1

Contact Done Set Up Prev Next

Vendor: User PO #: Ship To: Shop Warehouse: Edit

Order Desk Sharp Electronics of Canada 335 Britannia Road East Mississauga, ON L4Z 1W9	Work: 1-905-890-2100 Mobile: 519-574-2129 Fax: 1-905-890-7198	EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 567937 Ph: 715-287-3335 Ext: Fax: 715-287-4464 email: horizon@trivest.net	9/21/2005 Closed Need By
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Buyer Reference Reference 2 Ship VIA FOB Terms Receive All

Tina McKnight Swadron

Pick	Qty	unit	Product Description (max 2 lines)	Unit Cost	Ext Cost	Qty Rcvd	Qty Open	Qty Delvd
	1	ea	Sharp : LC37GB5U : 37"inch widescreen lcd flat panel tv	3,375.00	3,375.00	1	0	
	1	ea	Sharp : ANTWM : Tilting wall mount bracket for 26, 30, 32, 37 & 45 inch models	220.00	220.00	1	0	
	1	ea	Sharp : LC32GA5U : 32 inch liquid crystal television	2,250.00	2,250.00	1	0	
	1	ea	Sharp : LC15SH4U : 15 Inch LCD TV	440.00	440.00	1	0	
	1	ea	Sharp : ANPSMARM : Articulating Wall mount and Arm for 22 Inch and under Models	115.00	115.00	1	0	

SCPS 11.3v1 Upgrade
New Features, Enhancements and Fixes
7-09-2014

Enhancement: Projects & POS: New Project - Service Ticket Module

Project and Service Tickets can be created in the POS module and in the Project/Work Order module.

View or Add Service Tickets from the POS module.

The screenshot displays the 'Point of Sale - View POS' interface. At the top, there is a navigation bar with 'Utilities', 'Home', and 'Leave' buttons. The main header features the 'EME audio & video' logo, the user name 'User: Jim Engandela', and the location 'Location: 1 - EME Audio & Video Systems'. A button labeled 'Add a New POS' with a plus icon is visible in the top right. The main content area is divided into two sections: 'View POS Invoices' and 'View Project - Service Tickets'. The 'View POS Invoices' section contains eight icons for: Quotations, Work Orders, Sales Invoices, Service Orders Repair & OnSite with RMAs, Change Orders, Purchase Orders, Credit Memo's, and Product Return Authorization. The 'View Project - Service Tickets' section has a single icon and a note: 'Service Tickets are created in POS' and 'Project Tickets are created from the Work Order screen, in a Project'. A red arrow points upwards from the 'View Project - Service Tickets' section towards the 'Add a New POS' button, and another red arrow points from the bottom left towards the 'View Project - Service Tickets' section.

View or Add Project Tickets from the Project/Work Order module.

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

Install Notes **Thomas Dow** **Chippewa Valley Eye Clinic** **1273.1-1.100** **Labor Time Remaining on Project** **Totals** **Left To Install** **Left to Complete** **Create WO** **Leave**

Wire Manager **Project Time 75:55:00** **Products 2 33** **Auto Set** **View Work Orders**

WO Products WO Parts WO Wire **Sum** Proj **Labor Time Left 75:53:00** **Parts 0 20** **Qty to Issue**

Phase	Zone - Area	Qty Sold	Make : Model	Install Description	Finish	Left to Issue	Qty to Issue	WO's to Date			Left to Install	Left to Complete	
								Qty Issued	Qty Installed	Total Time Avg Time			
2	Balcony Automation	1 ea	Crestron : CNX-B12	Designer Keypad 12 Button	Specify	1						0	1
2	Bathroom 3 Automation	1 ea	Crestron : C2N-DB8		Specify	1						0	1
3	1 - Home Theater Audio	1 ea						1				1	1
3	1 - Home Theater Audio	4 pr						3	2	0:02:00 0:01:00		1	2
3	1 - Home Theater Audio	1 ea										0	1
3	1 - Home Theater Video	1 ea										0	1

Message

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

Project - Service List screen

Find Tickets Show All 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

Project - Service Tickets

12 Tickets

Ticket Kind	Ticket #	Ticket Date	Client	Type	Status	Billing	Created By	Appointment
View	Done	Done Date	Company	Work Requested	Work Done	Technician		
Project	PST #7223	7/9/2014	Goss, Dennis	New	Pending Scheduling	New	Jim Engandela	
	1275.1-1.100							
Service	PST #7222	7/9/2014	Erke, Anne	New	Pending Scheduling	New	Jim Engandela	
Service	PST #7221	7/9/2014	Clark, Dave & Judy	New	Pending Scheduling	New	Jim Engandela	
Project	PST #7220	7/9/2014	EME Audio & Video Systems	New	Pending Scheduling	New	Jim Engandela	
	1286.1-1.100							
Project	PST #7219	7/9/2014	Berger, Tali	New	Pending Scheduling	New	Jim Engandela	
	1286.1-1.100							

Project - Service Ticket screen: The Ticket has many features

- Book Appointments

- Email Notifications
- Labor Tracking
- Work Requested and Completed
- Pick Products from the Product Library

[Print Setup](#) [Delete Ticket](#) [Add New](#)

POS - Project Service Ticket

[Home](#)

[Print](#) [Preview](#) Hide Labor Detail Matrix

Service Ticket
PST #7199

Ticket Done [Contact](#) [Leave](#)
 [Set Up](#) [Prev](#) [Next](#)

eMail [LeRoy Asher](#) Home 715-985-3833

567 58TH Street
Oakland, CA 94607

Project #

Job Contact

Job Location

Job Phone

Salesman

Contact Notes (Does not Print)

Very good, long time customer.
Likes classical music and jazz.

Tickets

Ticket Type

Ticket Status

Billing Status

Assignments

Tech

Prev Tech

Project Mgr

Appt Requested

Date

Time

Warranty & Install Date

Warranty Status

Warranty Date

Ticket Creation

By: Jim Engandela

Date: 6/24/2014

Labor Tracking

Allocated Hrs:

Used Hrs: 1:45

Remaining Hrs: -1:45

Ticket Appointment

Date Time

Issue Master Tracker Event

Requested Installer

Add Edit

Appointment:

Email Notification All Notify Scheduling
 Notify Sales
 Notify Specific Notify Engineering

Description of Work Requested

Description of Work Requested

Item Notes (Does not Print)

Description of Work Completed ABC ✓

Description of Work Completed

Additional Work Requested Yes No

Yes

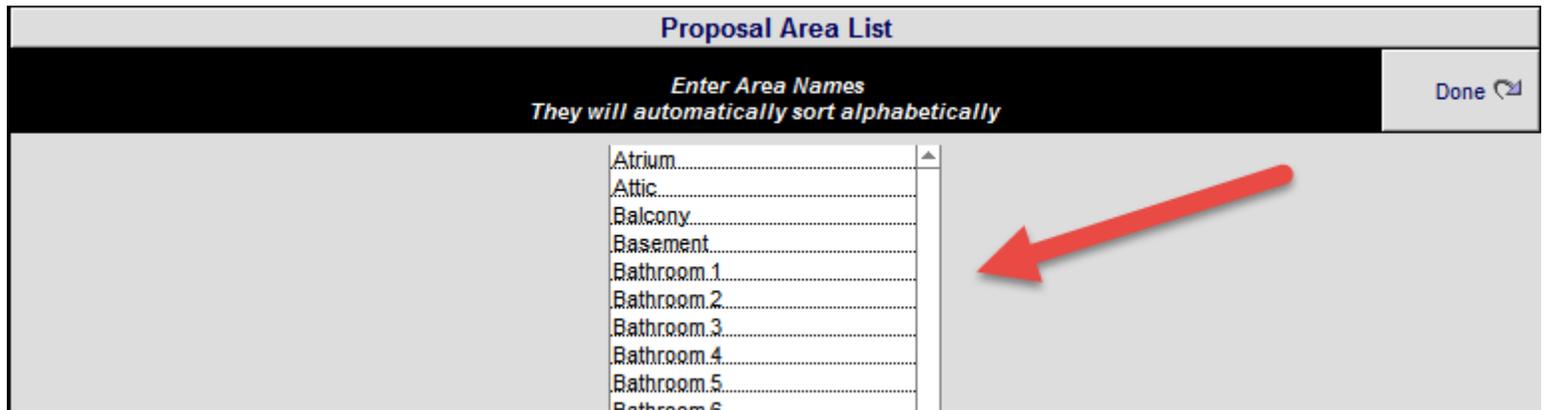
Technical Services

Technician	Start Time	End Time	- Lunch	Tech Total	Travel	Grand Total	Work Code	Description
=						Hrs		

Products, Parts & Materials

Pick	Qty	unit	Price Cue	Make - Model - Description (max 2 lines)	Labor (h:m:s)	Unit Price	Ext Price	Tax A	Tax B
<input type="checkbox"/>	0	ea	<input type="checkbox"/>	Crestron : AADS : Adagio Audio Distribution System : Black	0:45:00	2500.00	0.00	T	T
<input type="checkbox"/>	20	ea	<input type="checkbox"/>	Crestron : CNAMPX-12X60 : 12 Channel Multi-Room Amplifier : Black	1:00:00	2800.00	56,000.00	T	T

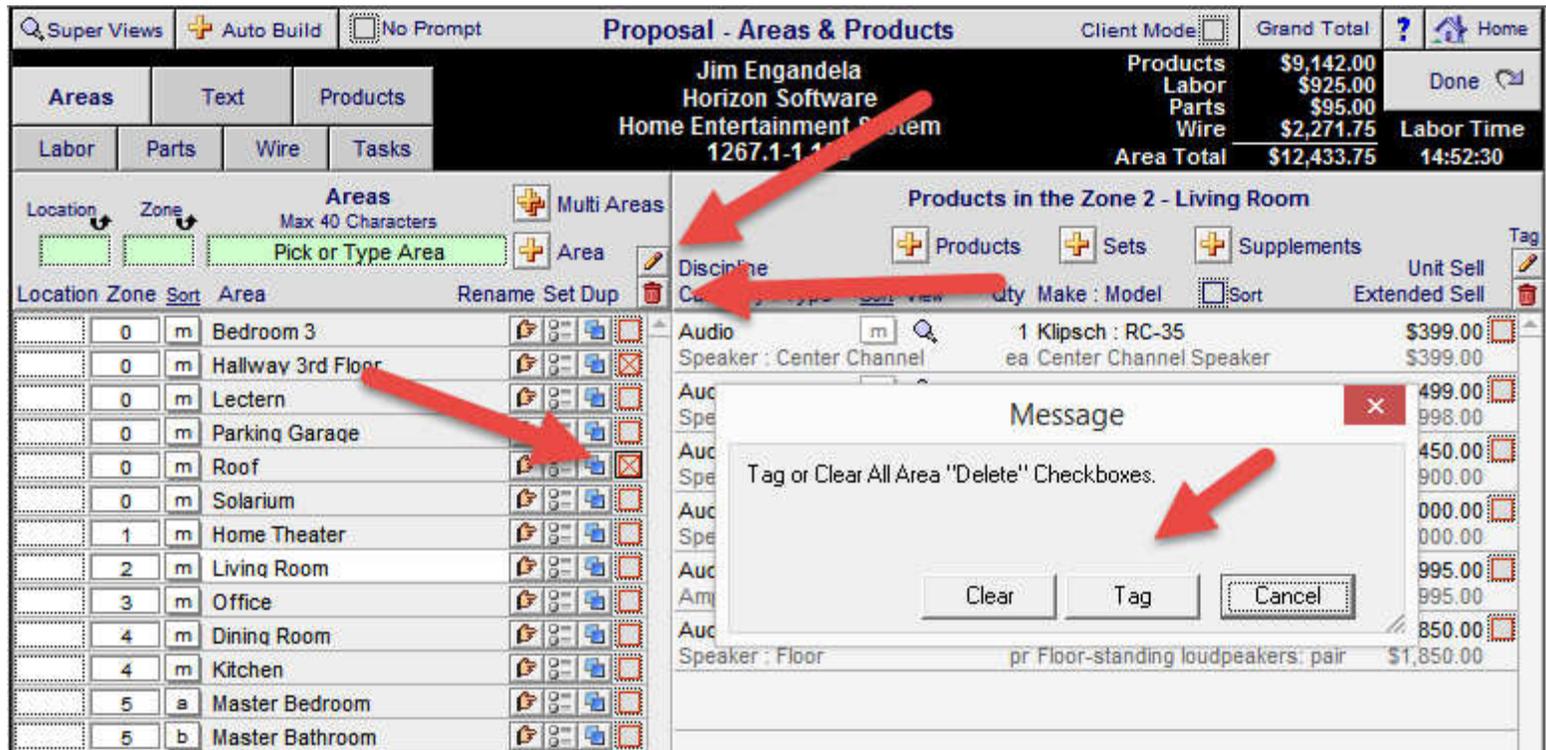
Enter the Area names you want and click Done. These added Areas will appear in the Area pop up lists in SCPS.



Enhancement: Proposals/Areas: Delete Multiple Areas

You can now Delete multiple Areas in a Proposal the same way as you can Delete Multiple Products within an Area.

Either check the Areas you want to Delete and click the Delete Icon or click on the Pick Pencil button and Clear or Tag all of the Area Delete Checkboxes.



Enhancement: Proposals/Areas: Add Area - No Pick Product Prompt per User

Each User can now set their own Master Preference for not showing the Pick Product Prompt when Adding Areas to their Proposal. This used to be global for all users.

Check All	UnCheck All	User Access Rights		Sort Users	◀ Prev/Next ▶	? Home
User Assignable Favorites <input type="checkbox"/>		No "Add Product" Prompt <input type="checkbox"/> ?		Jim Engandela President		PC Screen Size Computer Screen ?
Empty = "Global" Fav's		Checked boxes have Access Rights Unchecked boxes do not have Rights		Screen Magnification 100%		Done

Module/Screen Access <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 Proposals & Change Orders <input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Add Supplement (Labor, Parts, Wire) <input checked="" type="checkbox"/> Delete Supplements <input checked="" type="checkbox"/> Add Tax Codes <input checked="" type="checkbox"/> Add Area - No Pick Product Prompt	Access Level Administrator Administrators see all Proposals & Projects Managers see their Proposals & Projects and the users that they manage Users only see their Proposals & Projects Proposals - Projects - Completed Archives - Change Orders <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/> Duplicate Convert Proposals - Projects <input checked="" type="checkbox"/> Conversions Proposal > Project > Completed Archived Proposals <input checked="" type="checkbox"/> Restore Text Library	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 Point of Sale <input checked="" type="checkbox"/> Delete/Archive Invoices <input checked="" type="checkbox"/> Invoice Product Sell Price <input type="checkbox"/> Purchase Order Access Product Library <input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/> Duplicate <input checked="" type="checkbox"/> Hide Including Labor, Parts, Wire Supplements Edit
---	---	--

Regardless to the default setting, users can choose to override the Pick Product Prompt from within any Proposal.

Super Views	+ Auto Build	<input checked="" type="checkbox"/> No Prompt	Proposal - Areas & Products		Client Mode <input type="checkbox"/>	Grand Total	? Home
			Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100		Products \$229.95	Labor \$460.00	Done
					Parts \$366.67	Wire \$277.50	Labor Time
					Area Total \$1,334.12	7:45:00	

Location	Zone	Areas Max 40 Characters	+ Multi Areas	Products in the Zone 5 - Master Bathroom										
		Pick or Type Area	+ Area	+ Products	+ Sets	+ Supplements								
Location	Zone	Sort	Area	Rename	Set Dup	Discipline	Category : Type	Sort	View	Qty	Make : Model	Unit Sell	Extended Sell	Tag
	0	m	Bedroom 3			Audio		m		2	Sonance : CR201 : 91804		\$75.00	
	0	m	Hallway 3rd Floor			Speaker : In-wall				ea	6-1/2" In-Ceiling CR201 Speaker		\$150.00	
	0	m	Lectern			Audio		m		1	Sonance : VC60R		\$79.95	
	0	m	Parking Garage			Multi-room : Volume Control				ea	Volume Control		\$79.95	

Enhancement: Project & CO, Refine Payment screens

Enter the Payment Amounts and click the Add button and the Payment Invoice will be automatically created and the Date and Invoice number will be displayed.

The Original Project, All Final Change Orders and Master Project are displayed at the bottom of the screen.

Users can either Add Invoices for each Payment or manually Add a payment amount and a date and notes without Adding an Invoice.

Numbers rounding has also been improved and the Payment Summary report has been improved.

John & Mary Smith

View All Project CO's

Done
 View Project Invoices

Installation Type
New-3 Phase Pre-Trim-Final

Home Entertainment System
1284.1-1.100

Original Project Payments

Enter Payments into "Payment Steps" or "Total CO Payment", but not both. Then click "Add" button to Create the Invoice

Payment Description	Deposit	Payment 1	Payment 2	Payment 3	Hold Back	Total Payments
Due when the proposal is accepted and signed.	Due 10 days before the installation prewire phase.	Due 10 days before the installation trim phase.	Due 10 days before the installation final phase.	Due at the completion of the installation.		
Pymt Date Due	9/12/2006	10/6/2012	11/5/2012	12/5/2012	12/25/2012	
1 Paymt Amt Made	Enter Payment Amt & Create Invoice \$1.00	Enter Payment Amt & Create Invoice \$1.00	Enter Payment Amt & Create Invoice \$1.00	Enter Payment Amt & Create Invoice \$1.00	Enter Payment Amt & Create Invoice \$1.00	Enter Payment Amt & Create Pymt Invoice \$1.00
Invoice Date	5/22/2014	5/22/2014				
Invoice Number	3026 - 1284.1-1.100	3029 - 1284.1-1.100				
Notes						
2 Paymt Amt Made	\$2.00	\$2.00	\$2.00	\$2.00	\$2.00	\$2.00
Invoice Date						
Invoice Number						
Notes						
3 Paymt Amt Made	\$3.00	\$3.00	\$3.00	\$3.00	\$3.00	\$3.00
Invoice Date						
Invoice Number						
Notes						

Original Project
No CO's

Orig Project Pymts	\$7,055.98	\$21,167.93	\$14,111.96	\$21,167.93	\$7,055.98	\$70,559.78
- Payments Made	\$6.00	\$6.00	\$6.00	\$6.00	\$6.00	\$36.00
Balance Due	\$7,049.98	\$21,161.93	\$14,105.96	\$21,161.93	\$7,049.98	\$70,523.78

All Final Change Orders

CO Payments	\$0.00	\$10,025.84	\$7,519.38	\$7,519.38	\$0.00	\$25,064.59
- Payments Made	\$12.00	\$278.00	\$600.00	\$12.00	\$12.00	\$926.00
Balance Due	-\$12.00	\$9,747.84	\$6,919.38	\$7,507.38	-\$12.00	\$24,138.59

Master Project

Includes Original Project & All CO's

Master Proj Pymts	\$7,055.98	\$31,193.77	\$21,631.33	\$28,687.31	\$7,055.98	\$95,624.37
- Payments Made	\$18.00	\$284.00	\$606.00	\$18.00	\$18.00	\$310.00
Total Balance Due	\$7,037.98	\$30,909.77	\$21,025.33	\$28,669.31	\$7,037.98	\$95,314.37

The Original Project, All Final Change Orders and Master Project are displayed on the Printed report.

Store Report		John & Mary Smith				Page 1	
Master Project		Home Entertainment System				6/26/2014	
Payment Summary						1284.1-1.100	
Percentage	Deposit	Phase 1 Payment	Phase 2 Payment	Phase 3 Payment	Holdback	Total	
Payment Description	Deposit	Payment 1	Payment 2	Payment 3	Hold Back	Project	
	Due when the proposal is accepted and signed.	Due 10 days before the installation prewire phase.	Due 10 days before the installation trim phase.	Due 10 days before the installation final phase.	Due at the completion of the installation.	Payment	
CO Payments	\$7,055.98	\$21,167.93	\$14,111.96	\$21,167.93	\$7,055.98	\$70,559.78	
Pymt Date Due	9/12/2006	10/6/2012	11/5/2012	12/5/2012	12/25/2012		
1 Pymt Amt Made	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	
Invoice Date	5/22/2014	5/22/2014					
Invoice Number	3026 - 1284.1-1.100	3029 - 1284.1-1.100					
Notes							
2 Pymt Amt Made	\$2.00	\$2.00	\$2.00	\$2.00	\$2.00	\$2.00	
Invoice Date							
Invoice Number							
Notes							
3 Pymt Amt Made	\$3.00	\$3.00	\$3.00	\$3.00	\$3.00	\$3.00	
Invoice Date							
Invoice Number							
Notes							
- Original Pymts	\$6.00	\$6.00	\$6.00	\$6.00	\$6.00	\$36.00	
Balance Due	\$7,049.98	\$21,161.93	\$14,105.96	\$21,161.93	\$7,049.98	\$70,523.78	
All Final Change Orders							
CO Payments	\$0.00	\$10,025.84	\$7,519.38	\$7,519.38	\$0.00	\$25,064.59	
- Payments Made	\$12.00	\$278.00	\$600.00	\$12.00	\$12.00	\$280.00	
Balance Due	-\$12.00	\$9,747.84	\$6,919.38	\$7,507.38	-\$12.00	\$24,138.59	
Master Project				Includes Project & All CO's			
Master Proj	\$7,055.98	\$31,193.77	\$21,631.33	\$28,687.31	\$7,055.98	\$95,624.37	
- Payments Made	\$18.00	\$284.00	\$606.00	\$18.00	\$18.00	\$310.00	
Total Due	\$7,037.98	\$30,909.77	\$21,025.33	\$28,669.31	\$7,037.98	\$95,314.37	

The Final Change Order also shows the Payment summary of each invoice and those Payments that don't have an invoice.

Installation Type		Home Entertainment System					View CO Invoices
New-3 Phase Pre-Trim-Final		1284.1c2-1.100					
Enter Payments into "Payment Steps" or "Total CO Payment", but not both. Then click "Add" button to Create the Invoice							
Payment Steps						Total CO Payment	
Payment Description	Deposit	Payment 1 Due 10 days before the installation final phase	Payment 2 Due 10 days before the installation trim phase.	Payment 3 Due 10 days before the installation final phase	Holdback	Total CO Payment	
Pymt Due Date							
	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Pymt Invoice	
1 Pymt Amt Made	\$1.00	\$222.00	\$50.00	\$1.00	\$1.00	\$1.00	
Invoice Date		5/22/2014					
Invoice Number		3030 - 1284.1c2-1.100					
Notes							
2 Pymt Amt Made	\$2.00	\$20.00	\$444.00	\$2.00	\$2.00	\$2.00	
Invoice Date			5/22/2014				
Invoice Number			3031 - 1284.1c2-1.100				
Notes							
3 Pymt Amt Made	\$3.00	\$30.00	\$100.00	\$3.00	\$3.00	\$3.00	
Invoice Date							
Invoice Number							
Notes							
CO Payments	\$0.00	\$10,596.95	\$7,947.71	\$7,947.71	\$0.00	\$26,492.37	
-Total Pymts Made	\$6.00	\$272.00	\$594.00	\$6.00	\$6.00	\$890.00	
Balance Due	-\$6.00	\$10,324.95	\$7,353.71	\$7,941.71	-\$6.00	\$25,602.37	
Payment Summary							
	\$1.00						
	\$2.00						
	\$3.00						
5/22/2014	3030 - 1284.1c2-1.100	\$222.00					
	\$20.00						
	\$30.00						
	\$50.00						
5/22/2014	3031 - 1284.1c2-1.100	\$444.00					
	\$100.00						
	\$1.00						
	\$2.00						
	\$3.00						
	\$1.00						
	\$2.00						
	\$3.00						
	\$1.00						
	\$2.00						
	\$3.00						
	\$1.00						
	\$2.00						
	\$3.00						
	\$1.00						
	\$2.00						
	\$3.00						
	\$1.00						
	\$2.00						
	\$3.00						

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

Administrators can Edit Payments information

Admin Edit Payments Override Warnings **Master Project - Payment Summary** Refresh Print ?

John & Mary Smith View All Project CO's Done

Installation Type Home Entertainment System
 New-3 Phase Pre-Trim-Final 1284.1-1.100 View Project Invoices

2 **Final Change Order - Payment Director Edit** Done

John & Mary Smith

Installation Type Home Entertainment System
 New-3 Phase Pre-Trim-Final 1284.1c2-1.100

Payment Steps

Enter Payments into "Payment Steps" or "Total CO Payment", but not both. Then click "Add" button to Create the Invoice

Payment Description	Deposit	Payment 1 Due 10 days before the installation final phase	Payment 2 Due 10 days before the installation trim phase.	Payment 3 Due 10 days before the installation final phase	Holdback	Total Project/CO Payment
Pymt Date Due						
1 Pymt Amt Made	Enter Payment Amt & Create Invoice \$1.00	Enter Payment Amt & Create Invoice \$222.00	Enter Payment Amt & Create Invoice \$50.00	Enter Payment Amt & Create Invoice \$1.00	Enter Payment Amt & Create Invoice \$1.00	Enter Payment Amt & Create Pymt Invoice \$1.00
Invoice Date		5/22/2014				
Invoice Number		3030 - 1284.1c2-1.100				
Notes						
2 Pymt Amt Made	\$2.00	\$20.00	\$444.00	\$2.00	\$2.00	\$2.00
Invoice Date			5/22/2014			
Invoice Number			3031 - 1284.1c2-1.100			
Notes						
3 Pymt Amt Made	\$3.00	\$30.00	\$100.00	\$3.00	\$3.00	\$3.00
Invoice Date						
Invoice Number						
Notes						
CO Payments	\$0.00	\$10,596.95	\$7,947.71	\$7,947.71	\$0.00	\$26,492.37
-Total Pymts Made	\$6.00	\$272.00	\$594.00	\$6.00	\$6.00	\$890.00
CO Balance Due	-\$6.00	\$10,324.95	\$7,353.71	\$7,941.71	-\$6.00	\$25,602.37

Administrators can Override any pop up Warning the get when entering Payment information

Admin Edit Payments Override Warnings **Master Project - Payment Summary** Refresh Print

John & Mary Smith View All Project CO's Done

Installation Type Home Entertainment System View Project Invoice
 New-3 Phase Pre-Trim-Final 1284.1-1.100



Enhancement: Change Order List: Add reference field

A CO Reference Info field has been added to the Master Project - Current Change Order screen. This field can be used to enter info pertaining to the CO and will show up in the Printed CO report. It is not connected to any other part of SCPS.

Update CO Totals **Master Project - Current Change Orders** Print Home

John & Mary Smith Add New Change Order to This Project This Project

Home Entertainment System 1284.1-1.100 All Projects

= User Lock ID

View	Status	Date Created	CO Number	Change Order Title CO Reference Info	CO Total	Pymts Made	Balance Due	Del
	Pending	9/12/2006	1284.1c1-1.100	Home Entertainment System <input type="text"/>	\$95,624.37			
	Final	9/12/2006	1284.1c2-1.100	Home Entertainment System This is a field that you can enter any reference text into	\$26,492.37	\$666.00	\$25,826.37	
	Final	4/25/2007	1284.1c3-1.100	Home Entertainment System <input type="text"/>	-\$1,427.78		-\$1,427.78	

View Payment Summary



Enhancement: Change Order List: Payment Summary Pop Up

You can now view the Payment Invoice Summary for each CO from this screen by clicking on the View Payment Summary.

Update CO Totals **Master Project - Current Change Orders** Print Home

All Projects Change Orders **John & Mary Smith** Add New Change Order to This Project This Project

= User Lock ID **Home Entertainment System** All Projects
1284.1-1.100

Current Change Orders View Payment Summary

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	\$666.00	\$25,826.37	
	Final	4/25/2007	1284.1c3-1.100	Home Entertainment System	-\$1,427.78		-\$1,427.78	

Payment Summary ✕

5/22/2014	3030 - 1284.1c2-1.100	\$222.00
5/22/2014	3031 - 1284.1c2-1.100	\$444.00

You can also view this CO Invoice Summary for All CO's by Previewing this printed report from this screen.

5/28/2014 **EME Audio & Video Systems - Confidential Report** Page 1

Master Project - Change Order List
John & Mary Smith
Home Entertainment System
1284.1c1-1.100

Status	Date Created	CO Number	Change Order Title	CO Total	Pymts Made	Balance Due
Pending	9/12/2006	1284.1c1-1.100	Home Entertainment	\$95,624.37		
Final	9/12/2006	1284.1c2-1.100	Home Entertainment	\$95,624.37	\$666.00	\$25,826.37
			5/22/2014	3030 - 1284.1c2-1.100	\$222.00	
			5/22/2014	3031 - 1284.1c2-1.100	\$444.00	
Final	4/25/2007	1284.1c3-1.100	Home Entertainment	\$95,624.37		-\$1,427.78

Enhancement: Proposals/Areas: Consolidate SuperView screens

All 3 Proposal Super View screens can be accessed from a single button from the Proposal Detail or the Proposal - Areas & Products screens.

Discipline				Area				Phase				Proposal - Detail by Area				Utilities			Home									
Client				Areas				Area Text				Mr. & Mrs. Christenson				Pricing			Invoicing			Leave						
Project				Info				Products				Overviews				North American Fly LTD				Payments			Purchasing			Tracker		
Contact				Log				Supplements				Notes				Home Entertainment System				Project Fees			Work Orders			Print Menu		
Client Mode <input type="checkbox"/>				Super Views				Labor Meter				QV				Wire Manager			Change Orders			Grand Total						
Discipline : Category : Type												Qty Make : Model				Description				Area & Product Totals								
Home Entertainment System																												
Breakfast Room																		7,300.00										
Audio : Multi-room : Kevoad												2 ea Linn : 5101 Personal Handset				Universal learning remote : Black				780.00								

Super Views				+ Auto Build				No Prompt				Proposal - Areas & Products				Client Mode <input type="checkbox"/>			Grand Total			Home																																													
Areas				Text				Products				Jim Engandela				Products			\$229.95			Done																																													
Labor				Parts				Wire				Horizon Software				Labor			\$460.00																																																
												Home Entertainment System				Parts			\$366.67			Labor Time																																													
												1267.1-1.100				Wire			\$277.50			7:45:00																																													
												Area Total				\$1,334.12																																																			
Areas Location Zone Max 40 Characters <input type="text"/> <input type="text"/> <input type="text"/> Pick or Type Area <input type="text"/> <input type="text"/> <input type="text"/> Area												Products in the Zone 5 - Master Bathroom <input type="text"/> Products <input type="text"/> Sets <input type="text"/> Supplements Discipline Unit Sell Category : Type Sort View Qty Make : Model <input type="checkbox"/> Sort Extended Sell Tag																																																							
<table border="1"> <thead> <tr> <th>Location</th> <th>Zone</th> <th>Sort</th> <th>Area</th> </tr> </thead> <tbody> <tr><td></td><td>0</td><td>m</td><td>Bedroom 3</td></tr> <tr><td></td><td>0</td><td>m</td><td>Hallway 3rd Floor</td></tr> <tr><td></td><td>0</td><td>m</td><td>Lectern</td></tr> <tr><td></td><td>0</td><td>m</td><td>Parking Garage</td></tr> <tr><td></td><td>0</td><td>m</td><td>Roof</td></tr> <tr><td></td><td>0</td><td>m</td><td>Solarium</td></tr> <tr><td></td><td>1</td><td>m</td><td>Home Theater</td></tr> </tbody> </table>												Location	Zone	Sort	Area		0	m	Bedroom 3		0	m	Hallway 3rd Floor		0	m	Lectern		0	m	Parking Garage		0	m	Roof		0	m	Solarium		1	m	Home Theater	<table border="1"> <tbody> <tr><td>201 : 91804</td><td>\$75.00</td><td><input type="checkbox"/></td></tr> <tr><td>ng CR201 Speaker</td><td>\$150.00</td><td><input type="checkbox"/></td></tr> <tr><td>:60R</td><td>\$79.95</td><td><input type="checkbox"/></td></tr> <tr><td>ol</td><td>\$79.95</td><td><input type="checkbox"/></td></tr> </tbody> </table>												201 : 91804	\$75.00	<input type="checkbox"/>	ng CR201 Speaker	\$150.00	<input type="checkbox"/>	:60R	\$79.95	<input type="checkbox"/>	ol	\$79.95	<input type="checkbox"/>
Location	Zone	Sort	Area																																																																
	0	m	Bedroom 3																																																																
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:60R	\$79.95	<input type="checkbox"/>																																																																	
ol	\$79.95	<input type="checkbox"/>																																																																	
Message Super View or Areas Summary or Products Summary? <input type="button" value="Products"/> <input type="button" value="Areas"/> <input type="button" value="Super View"/>																																																																			

The Super View enable you to Select an Area and see the Products and their associated Parts & Wire Supplements.

Super/Sum Views		Proposal - Super View			
Done		Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100			
Select an Area		Zone 5 - Master Bathroom			
		Products		\$229.95	Parts Supplements
Zone - Area	Qty Discipline	Make : Model	Unit Sell Ext Sell	Qty	Make : Model Associated Product
Bedroom 3	2 ea	Sonance : CR201 : 91804	\$75.00	2 pr	Linn : Wall Box
Hallway 3rd Floor	Audio	6-1/2" In-Ceiling CR201	\$150.00		Sonance : CR201
Lectern	1 ea	Sonance : VC60R	\$79.95		
Parking Garage	Audio	Volume Control	\$79.95		
Roof					
Solarium					
Zone 1 - Home Theater					
Zone 2 - Living Room					
Zone 3 - Office					
Zone 4 - Dining Room					
Zone 4 - Kitchen					
Zone 5 - Master Bedroom					
Zone 5 - Master Bathroom					

The Area Sum view show the totals for each Area including labor time.

Super/Sum Views		Proposal - Area Sum				Client Mode <input type="checkbox"/>		Home				
Done		Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100										
View Products in this Area		Equipment		Installation		Misc. Parts		Wire & Cable		Area Totals		Labor
Zone - Area												
Zone 1 - Home Theater	10,234.95	40.4%	618.33	47.2%	105.00	41.0%	1,214.95	42.8%	12,173.23	41.0%	9:05:00	
Zone 2 - Living Room	9,142.00	42.7%	925.00	47.0%	95.00	40.0%	2,271.75	40.1%	12,433.75	42.5%	14:52:30	
Zone 3 - Office	7,743.99	39.0%	722.50	47.4%	105.00	41.0%	1,218.70	43.6%	9,790.19	40.2%	11:22:30	
Zone 4 - Dining Room	1,095.00	40.0%	342.50	45.1%	288.33	40.3%	312.50	56.8%	2,038.33	43.5%	5:40:00	
Zone 4 - Kitchen	1,095.00	40.0%	342.50	45.1%	288.33	40.3%	312.50	56.8%	2,038.33	43.5%	5:40:00	
Zone 5 - Master Bathroom	229.95	50.0%	460.00	45.4%	366.67	40.0%	277.50	64.9%	1,334.12	48.7%	7:45:00	
Zone 5 - Master Bedroom	6,995.00	40.0%	602.50	47.1%	105.00	41.0%	998.75	44.4%	8,701.25	41.0%	9:42:30	

The Product Sum view show the sum Quantity of each Product in the Proposal.
 Show shows All Areas and Products in each Area
 Sum View shows All Products in the Proposal

Super/Sum Views		Proposal - Sum Products		Print	?	Home
<input type="button" value="Show All"/> <input type="button" value="Sum View"/>		Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100			<input type="button" value="Done"/>	
Zone - Area	Qty	Make : Model	Description			
	1 ea	Klipsch : RC-35	Center Channel Speaker			
	2 ea	Klipsch : RF-35	Reference Tower Speaker			
	2 ea	Klipsch : RS-7	Reference Surround Speaker			
	1 ea	Klipsch : RSW-10	Reference Subwoofer			
	1 ea	Linn : 5101 Personal Handset	Universal learning remote			
	2 ea	Linn : Classik Movie Di	Integrated multi-channel DVD-CD			
	1 ea	Linn : Classik Movie Di-B	Integrated multi-channel DVD-CD			
	2 ea	Linn : Classik Speaker Package	Complete 5 speaker surround system with			
	2 pr	Linn : Diskreet-Rd	In-wall loudspeakers - Round			
	5 ea	Linn : Knekt RCU	Knekt room control unit			
	1 pr	Linn : Ninka	Floor-standing loudspeakers: pair			
	1 ea	Runco : CL-610	DLP Projector			
	2 ea	Sonance : CR201 : 91804	6-1/2" In-Ceiling CR201 Speaker			
	1 ea	Sonance : VC60R	Volume Control			
	1 ea	Sony : DVP-NS999ES	Progressive Scan DVD Player			
	1 ea	Sony : KV-27FS13	27 FD Trinitron® WEGA® TV			
	1 ea	Sony : SLV-N99	VHS Video Cassette Recorder			

Enhancement: POS: Pick Product Price Cue

Checking the Pick Price Cue box (before you pick a product) will pop up the selection window, so that you can choose what Price you want. List, Minimum Sell or Sell Price.

The screenshot displays the 'POS - Quotation' interface. At the top, there are navigation buttons like 'Print Setup', 'Delete', 'Duplicate', and 'Add New'. The main header shows 'QUOTATION QT #7190' and '2 of 17'. Below this, there's a contact information section for 'Laura & Robbie Pryde' with home, work, mobile, and fax numbers. A red arrow points to the 'Pick Price Cue' checkbox in the 'Pick' table, which is checked. The table lists three items: 'Crestron : AADS : Adagio Audio Distribution System : Black', 'AMX : MVP-8400 : 8.4" modero viewpoint', and 'AMX : MVP-WDS : Mvp wall/flush mount docking station'. Below the table is a 'Product Library - POS Pick Products' section with various filters and a 'Pick or Add a New Product' dialog box. A red arrow points to the 'Sell' button in the 'Message' dialog box, which asks 'Do you want to use the product....' and offers options: 'List', 'Min Sell', and 'Sell'.

Enhancement: Project/Purchasing: Adjust Staged Qty with Delivered and Received Qty

After entering the Staged Qty, when you Receive a Qty in the Staged Qty will be increased and when you Deliver a Qty the Staged Qty will be reduced.

Staged = 5

Purchase Orders - All - 1 Products										PO	WO	SI	Home		
LeRoy Asher										To Order	Back Order	+	Create PO	Leave	
1297.1-1.100										Products	10		Auto Set PO Qty	View P.O.'s	
Global Buy Pkg Off															
Phase	Zone - Area	Qty Sold	Make : Model	Finish	Alt-x	Vendor ?	Qty	To Order Qty	Enter PO Qty	Sum Mode - PO Status	Ordered Staged	Recvd to date	B/O		
2		10 ea	Linn : 5101 Personal Handset	Black		Linn Products		10			5				
			8/8/2011	\$234.00	\$234.00		2				5				

+ Received = 5
 Staged = 10

Purchase Orders - All - 1 Products										PO	WO	SI	Home		
LeRoy Asher										To Order	Back Order	+	Create PO	Leave	
1297.1-1.100										Products	5	0	Auto Set PO Qty	View P.O.'s	
Global Buy Pkg Off															
Phase	Zone - Area	Qty Sold	Make : Model	Finish	Alt-x	Vendor ?	Qty	To Order Qty	Enter PO Qty	Sum Mode - PO Status	Ordered Staged	Recvd to date	B/O		
2		10 ea	Linn : 5101 Personal Handset	Black		Linn Products		5			5	5	0		
			8/8/2011	\$234.00	\$234.00	\$234.00	17				10				

-Deliver = 3
 Staged = 7

Purchase Orders - All - 1 Products										PO	WO	SI	Home		
LeRoy Asher										To Order	Back Order	+	Create PO	Leave	
1297.1-1.100										Products	5	0	Auto Set PO Qty	View P.O.'s	
Global Buy Pkg Off															
Phase	Zone - Area	Qty Sold	Make : Model	Finish	Alt-x	Vendor ?	Qty	To Order Qty	Enter PO Qty	Sum Mode - PO Status	Ordered Staged	Recvd to date	B/O		
2		10 ea	Linn : 5101 Personal Handset	Black		Linn Products		5			5	5	0		
		3	8/8/2011	\$234.00	\$234.00	\$234.00	17				7				

Enhancement: Master Prefs/Other/Proposal 1: New Proposals: Do not sort Contact to speed up process

When adding a New Proposal you can now turn off the Contact sort feature. This will speed up the process when you have a large number of Contacts.

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

Entering Proposal/Project/Completed/Archive Lists

No Proposal "New or View" Prompt

Sort Proposals & Projects

Proposal & Project Sort Order

New Proposals - Contact Sort

Do Not Sort Contacts
to Increase the speed of entering the Contact Module
when creating New Proposals.



Enhancement: Master Prefs/Proposal/Terms: Show or Do not Show - Contract Payment Text

Before the Payments section of a Proposal you can add text. This text comes from the Master Prefs/Proposals/Terms screen.

You can now choose to Show or Not Show this text in your Proposal. The size of this field has also been increased to 10 lines.

To show or not show in existing proposals, go to the Print Menu/Prefs/Proposals/Terms screen.

Payment Schedule (Contract Pricing Page)	
Show	Header Message
<input type="radio"/> Show	1
<input checked="" type="radio"/> Do Not Show	2
	3
	4
	5
	6
	7
	8
	9
	10

Electronics & Installation

	Equipment	\$11,422.00
	Installation	\$995.83
	Misc. Parts	\$200.00
\$28,679.19 List Price	Wire & Cable	\$3,041.20
-\$11,587.95 Courtesy Discount	Additional Fees	\$1,432.21
\$17,091.24 Total	Total	\$17,091.24
	Tax	\$861.25
	Grand Total	\$17,952.49

Prices quoted are guaranteed until: 9/1/2014

Payment Terms

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10



Deposit	Due when the proposal is accepted and signed.	\$1,795.25
Payment 1	Due 10 days before the installation prewire phase.	\$5,385.75
Payment 2	Due 10 days before the installation trim phase.	\$3,590.50
Payment 3	Due 10 days before the installation final phase.	\$5,385.75
Hold Back	Due at the completion of the installation.	\$1,795.25

Price Guarantee

Products & Installation prices are estimated. Total price will consist of installed products & actual installation. All labor, materials, trip charges and Monster Cables listed within this proposal are estimates only. An actual bill for all labor, materials, trip charges and cables will be hand written for each day of work and is due upon completion of each workday.

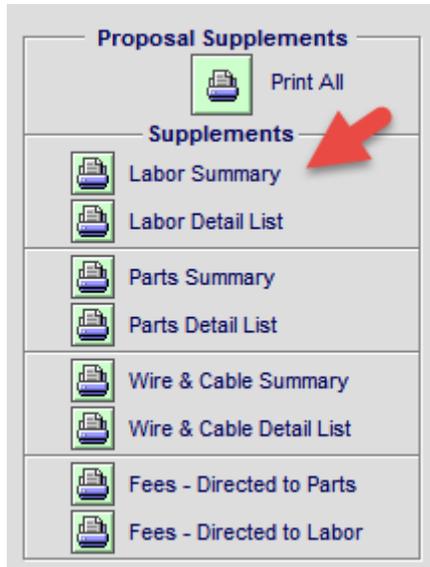
Please Authorize & Return

Date: Lee & Kris Christenson or authorized signature on clients behalf

Date: Jim Engandela, President

Fix: Proposal/Print Menu: Labor Summary goes back to preview prompt after printing.

Fix Labor Summary goes back to preview prompt after printing.



Fix: Proposal/Print Menu: Fix Printing with Custom Reports

When printing Custom Proposals from the Proposal/Print Menu the user is returned to the Print Menu instead of the Payment Terms screen.

Fix: Project/PO and WO Invoice: Remove SI warning message when deleting a PO/WO Invoice

The image shows a screenshot of a software interface titled "Project - Purchase Order Detail". At the top, there are buttons for "Setup", "Email Vendor", and "Delete PO". A red arrow points to the "Delete PO" button. Below the buttons, there are several sections: "Do not show Client/Project info on PO" (checkbox), "Vendor Address" (Linn Products, 8787 Perimeter Park Blvd., Jacksonville, FL 32216 USA), "Ship To Address" (EME Audio & Video Systems, 100 Purchasing Lane, Purchasing City, WI 567937), "Buyer: Joe Buyer" (1297.1-1.100 LeRoy Asher), "Shipping Method: Best Way", "PO Terms:", "PO Comments & Notes:", "PO Total \$1,170.00", "Receiving" section with "Auto Receive All PO Items" button, "Date Received", "Received By", "Receive Qty Qty" (5 ea), "View-Edit Recvd Open", "Rcv'd: 6/30/2014 By: Qty:", and a table of items.

Order Qty	Buy Qty	Make	Description	Model	Finish	Unit	Raw Cost	Ext Raw Cost	Receive	Qty Recvd	Qty Open
5	5	Linn	5101 Personal Handset		Black		\$234.00	\$1,170.00	Receive	5	0 ea
5	5		Universal learning remote						View-Edit		

Fix: Master Project and CO Payment Screen - Total Due

The Master Project Payments Made and Total Due amounts have been corrected. The Master Project Payments Printed Report has also been corrected. Also Rounding in all of the Totals has been eliminated so the total numbers are not .01 off.

Admin Edit Payments		<input type="checkbox"/> Override Warnings	Master Project - Payment Summary			Refresh	Print	?
LeRoy Asher							View All CO Payments for this Project	Done
Installation Type		Home Entertainment System					View Project Invoices	
New-3 Phase Pre-Trim-Final		1298.1-1.100						
Original Project Payments								
<i>Enter Payments into "Payment Steps" or "Total CO Payment", but not both. Then click "Add" button to Create the Invoice</i>								
Payment Description	Deposit	Payment 1	Payment 2	Payment 3	Hold Back	Total Payments		
Pymt Date Due	Due when the proposal is accepted and signed. 7/2/2014	Due 10 days before the installation prewire phase. 7/22/2014	Due 10 days before the installation trim phase. 8/21/2014	Due 10 days before the installation final phase. 9/20/2014	Due at the completion of the installation. 1/8/2015			
1 Paymt Amt Made	Enter Payment Amt & Create Invoice \$1.00 +	Enter Payment Amt & Create Invoice \$2.00 +	Enter Payment Amt & Create Invoice \$3.00 +	Enter Payment Amt & Create Invoice \$4.00 +	Enter Payment Amt & Create Invoice \$5.00 +	Enter Payment Amt & Create Pymt Invoice		
Invoice Date								
Invoice Number								
Notes								
2 Paymt Amt Made								
Invoice Date								
Invoice Number								
Notes								
3 Paymt Amt Made								
Invoice Date								
Invoice Number								
Notes								
Original Project No CO's								
Orig Project Pymts	\$1,405.66	\$4,216.99	\$2,811.33	\$4,216.99	\$1,405.66	\$14,056.63		
- Payments Made	\$1.00	\$2.00	\$3.00	\$4.00	\$5.00	\$15.00		
Balance Due	\$1,404.66	\$4,214.99	\$2,808.33	\$4,212.99	\$1,400.66	\$14,041.63		
All Final Change Orders								
CO Payments	\$2,811.33	\$8,433.98	\$5,622.65	\$8,433.98	\$2,811.33	\$28,113.26		
- Payments Made	\$1,404.66	\$4,214.99	\$2,808.33	\$4,211.99	\$1,399.66	\$14,039.63		
Balance Due	\$1,406.66	\$4,218.99	\$2,814.33	\$4,221.99	\$1,411.66	\$14,073.63		
Master Project Includes Original Project & All CO's								
Master Proj Pymts	\$4,216.99	\$12,650.97	\$8,433.98	\$12,650.97	\$4,216.99	\$42,169.89		
- Payments Made	\$1,405.66	\$4,216.99	\$2,811.33	\$4,215.99	\$1,404.66	\$14,054.63		
Total Balance Due	\$2,811.33	\$8,433.98	\$5,622.65	\$8,434.98	\$2,812.33	\$28,115.26		

SCPS 11.2v1 Upgrade

New Features, Enhancements and Fixes

5-22-2014

Enhancement: Master Project & Change Orders Payments: Redesign Payment Mechanism and Screens

The Project and Change Order Payment mechanisms and screens have been redesigned to provide more flexibility when entering, tracking and modifying client payments.

You now can either enter a payment and create an invoice for that payment and the payment amount, invoice date and invoice number will appear on the Payment screen and in the Payment summary or simply enter a payment and date without creating an invoice and the payment will also appear on the Payment screen and in the Payment Summary.

You can now also choose to enter Payments in each Payment step (Deposit, Phase 1, Phase 2, Phase 3, Holdback) or into the Total Payment column for the entire Project or Change Order.

Auto create an Invoice after entering a Payment Amount, by clicking Yes

Admin Edit Payments
 Override Warnings

Master Project - Payment Summary

Refresh Print ?

John & Mary Smith

Installation Type
 New-3 Phase Pre-Trim-Final

Home Entertainment System
 1284.1-1.100

View All Project CO's
View Project Invoices

Project Payments

Enter Payments into "Payment Steps" or "Total CO Payment", but not both. Then click "Add" button to Create the Invoice

Payment Description	Deposit Deposit	Phase 1 Payment Payment 1	Phase 2 Payment Payment 2	Phase 3 Payment Payment 3	Holdback Hold Back	Total Payments
Project Payments	\$7,055.98	\$21,167.93	\$14,111.96	\$21,167.93	\$7,055.98	\$70,559.78
<i>Pymt Date Due</i>	9/12/2006	10/6/2012	11/5/2012	12/5/2012	12/25/2012	
1 Paymt Amt Made	Enter Payment Amt & Create Invoice <input type="text" value="\$7,000.00"/>	Enter Payment Amt & Create Invoice <input type="text"/>	Enter Payment Amt & Create Pymt Invoice <input type="text"/>			
<i>Invoice Date</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>Invoice Number</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>Notes</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2 Paymt Amt Made	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>Invoice Date</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>Invoice Number</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>Notes</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Message

Do you want to create an Invoice for this Payment?

Once the Invoice is created and you're Print or Post it the Invoice Date and Invoice Number will show up on the Payment screen.

Enter Payment Amt & Create Invoice

\$7,000.00

5/22/2014

3026 - 1284.1-1.100

The Invoice date, number and amount will also appear in the Payment Summary display and in the Project Manager.

Master Project						
Includes Original Project & All CO's						
Master Proj Totals	\$7,055.98	\$31,193.77	\$21,631.33	\$28,687.31	\$7,055.98	\$95,624.37
- Payments Made	\$7,000.00					\$7,000.00
Total Balance Due	\$55.98	\$31,193.77	\$21,631.33	\$28,687.31	\$7,055.98	\$88,624.37

Payment Summary		
5/22/2014	3026 - 1284.1-1.100	\$7,000.00

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

Project Manager - Project Payments									
Number	Rep	Project Owners	View/Modify	Deposit	Payment 1	Payment 2	Payment 3	Retainer	Total
1285.1-1.100 Project Balance Due				\$3,064.67	\$9,194.00	\$6,129.34	\$9,194.00	\$3,064.67	\$30,646.68
Project: 1284.1-1.100		Original Project		\$7,055.98	\$21,167.93	\$14,111.96	\$21,167.93	\$7,055.98	\$70,559.78
Project Title: Home Entertainment System		Payment Due Dates		9/12/2006	10/6/2012	11/5/2012	12/5/2012	12/25/2012	
Client: Smith, John & Mary		- Total Pymts Made		\$7,000.00					\$7,000.00
Date Sold: 9/12/2006									
Change Orders				\$0.00	\$10,073.84	\$7,519.38	\$7,519.38	\$0.00	\$25,064.59
- Total Pymts Made									
Master Project				\$7,055.98	\$31,193.77	\$21,631.33	\$28,687.31	\$7,055.98	\$95,624.37
- Total Pymts Made				\$7,000.00					\$7,000.00
1284.1-1.100 Project Balance Due				\$55.98	\$31,193.77	\$21,631.33	\$28,687.31	\$7,055.98	\$88,624.37

You can view the All Project Change Orders from the Project Manager/Payments screen or all of the Project or Change Order Payment Invoices.

Final Change Order - Payment Director Edit						
John & Mary Smith						Done
Installation Type		Home Entertainment System				
New-3 Phase Pre-Trim-Final		1284.1c2-1.100				
Payment Steps					Total Project /CO Payment	
Payment Description	Deposit Deposit	Phase 1 Payment Payment 1 Due 10 days before the installation final phase	Phase 2 Payment Payment 2 Due 10 days before the installation trim phase.	Phase 3 Payment Payment 3 Due 10 days before the installation final phase	Holdback Holdback	Total Project/CO Payment
CO Payments Pymt Date Due	\$0.00	\$10,596.95	\$7,947.71	\$7,947.71	\$0.00	\$26,492.37
1 Paymt Amt Made	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Pymt Invoice
		\$10,000.00	\$7,000.00			
Invoice Date		5/22/2014	5/22/2014			
Invoice Number		3027 - 1284.1c2-1.100	3028 - 1284.1c2-1.100			
Notes						
2 Paymt Amt Made						
Invoice Date	5/7/2014					
Invoice Number						
Notes						
3 Paymt Amt Made						
Invoice Date	5/20/2014					

Message ✖

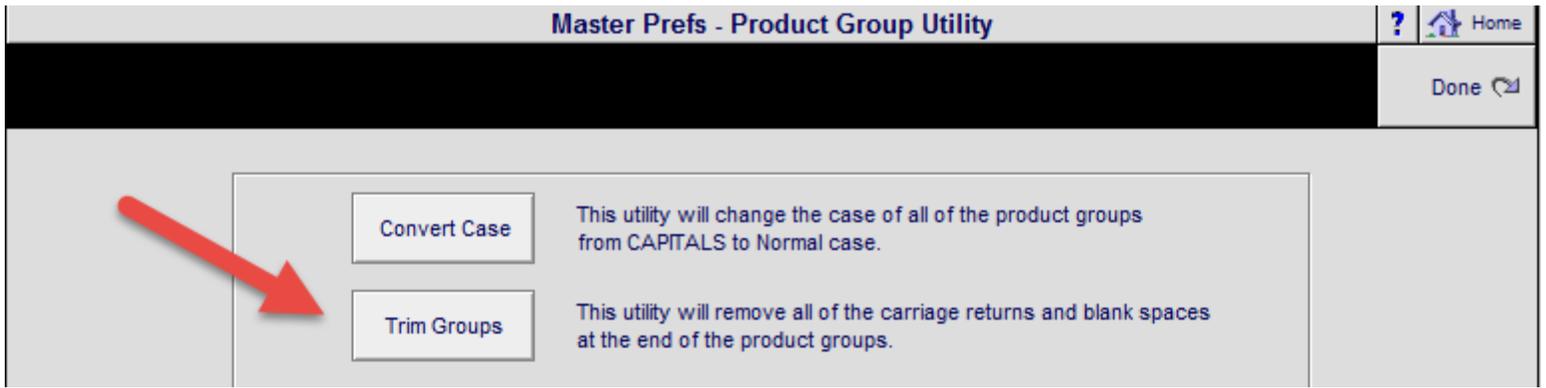
Please note: Changing Payment Amounts, Dates and Invoices numbers, will not change the Actual Invoices and this may not be desirable.

Enhancement: Master Prefs/Groups/utility: Trim Groups

If you have spaces or carriage returns and spaces in your Product Groups, this utility will remove them from both your Preference Groups and your Product Library Groups.

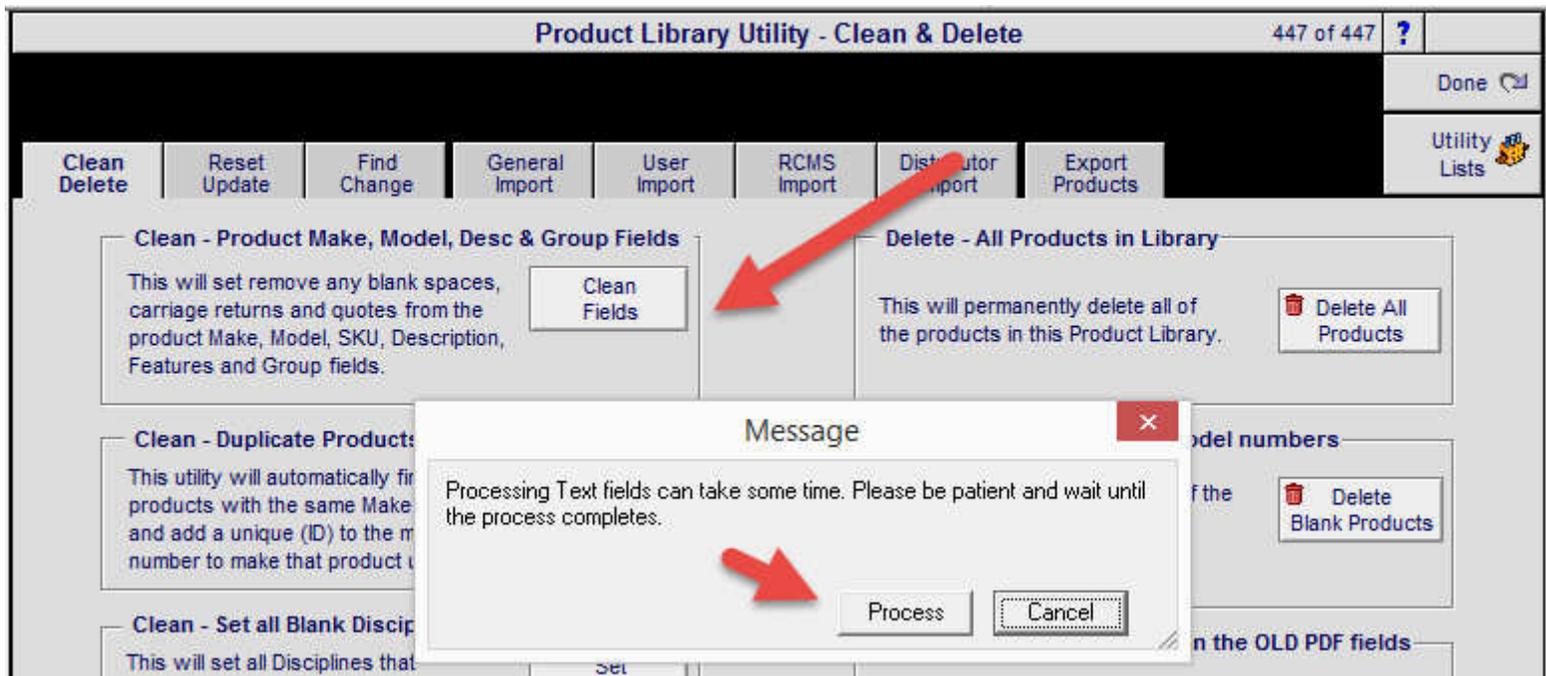
You now have a the ability to Cancel the processing before it starts.

Edit Product Groups	Product Library - Product Group Utility						1 of 447	?	Home
Assign a new Discipline to this Product Crestron AADS Adagio Audio Distribution System Audio : Multi-room : Switcher									
Done									
<input type="button" value="Prev"/> <input type="button" value="Next"/>									
Classification	Pick	Discipline	Category	Type	Class	Phase	Prods	Group Navigator	
Product	<input type="checkbox"/>	Audio	Amplifier	Integrated Amplifier	Product	3	Y	Show All Disciplines	



Running this Utility from the Product Library/Utility screen will also clean the Product Library Make, Model, Description, etc fields as well as the Group (Department, Category, Type) fields.

You now have the ability to Cancel the processing before it starts.



Enhancement: Master Prefs/Lists/Tracker: Pop Up Lists for Appointment Task Name and Description

You can now print the Proposal Detail screen.

Lists are auto alphabetized

Master Prefs - Value Lists - Tracker

Home

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

Appointment - Task Name

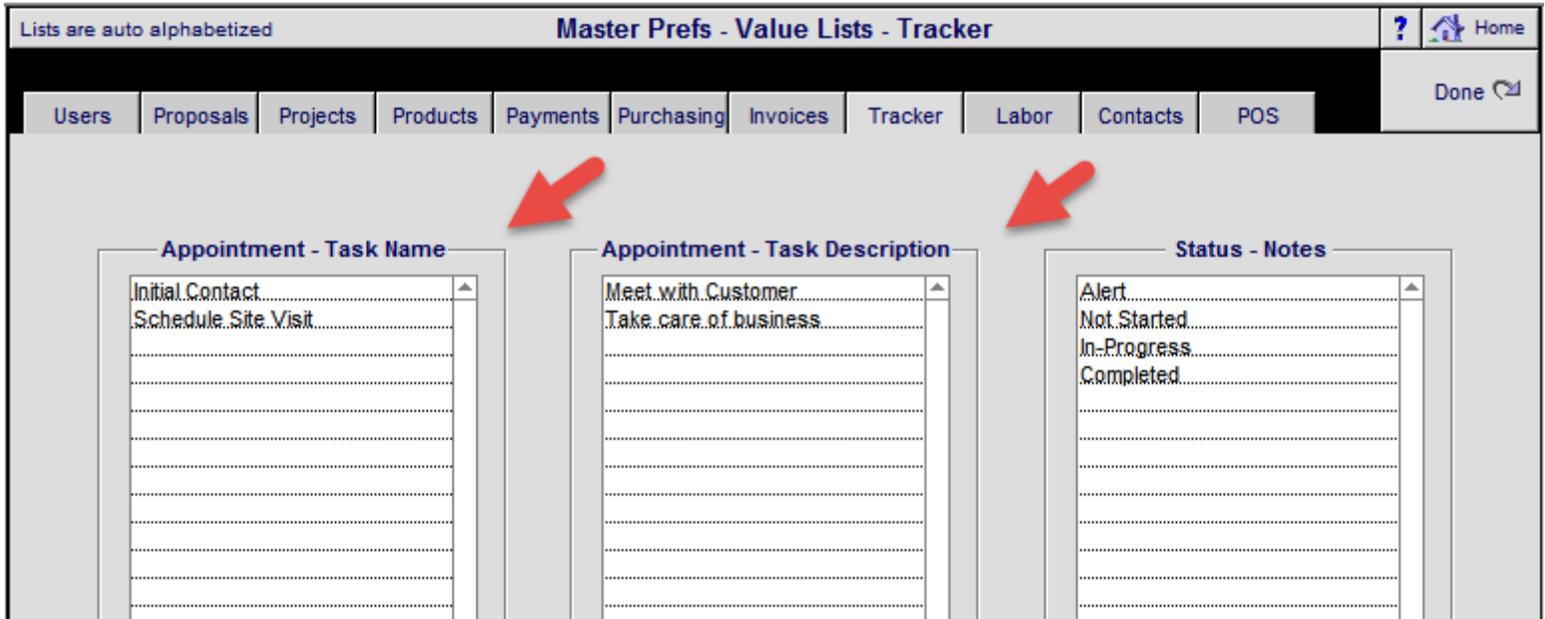
- Initial Contact
- Schedule Site Visit

Appointment - Task Description

- Meet with Customer
- Take care of business

Status - Notes

- Alert
- Not Started
- In-Progress
- Completed



Appointment

Appointment created for
Eileen Back

Appt Owner Jim Engandela Default = Current User Priority 5

Created By

Appt Name New Appointment

Appt Description

Date & Time

Date April 25, 2014

Time 12:00 pm to 1:00 pm

Repeat Appointment

Cancel Delete... + Another New Appointment Done



Enhancement: Master Prefs/POS/POS2: New Default Option for POS PO Comments

You can now enter Comments into your Master Prefs screen so that newly created POS Purchase Orders will automatically include these comments.

The screenshot shows the 'Master Prefs - POS 2' interface. At the top, there are tabs for 'POS 1', 'POS 2', 'Alternate', and 'Proj Ticket'. Below the tabs are four comment sections:

- Quotation Comments:** Prices in this quotation are good for 30 days.
- Invoice Comments:** Payments are due within 30 days.
- Service Order - Comments:** (Empty)
- PO Order - Comments:** Please verify pricing prior to processing this order. Invoice(s) will be paid according to the above prices. Please notify buyer immediately if you are unable to ship as specified.

A red arrow points to the 'PO Order - Comments' section.

POS PO Comments

This close-up shows the 'POS PO Comments' section. It features a text box containing the following text:

Please verify pricing prior to processing this order.
Invoice(s) will be paid according to the above prices.
Please notify buyer immediately if you are unable to ship as specified.

To the right of the text box is a 'Refresh' button. Further right is a 'Total:' label. At the bottom right, there are 'Top' and 'Done' buttons. A red arrow points to the text box.

Enhancement: Master Prefs/Users: Increase Portal Size

The User Portal has been increased in size to accommodate more users without scrolling.

Sort User		Master Prefs - Users						Print	Home
Users must have a Location, First Name and Last Name, an Employee Number and a Password <i>Employee Numbers must be unique within each Location</i>									
Users		InActive		Done					
+ New User		DeActivate		ReAssign		Users			
Company Location	First Name	Last Name	Initials	User AlphaNumber	Job Title	Access Rights	Login Password	Assign Users to Project Managers	
Max 2 char				Max 5 char					
1	Dave	Dowling	SR	51	CAD Operator	DD	DD	Manager Jon Oster	
	Phone Ext	Mobile #	715-234-5986	Email	horizondd@trivest.net	Administrator	Engineer	Jim Engandela	
1	Jim	Engandela	JE	100	President	JE	JE	Manager	
	Phone Ext	Mobile #	715-287-3335	Email		Administrator	Engineer	Jon Oster	
1	Jon	Oster	JO	45	Sales Manager	JO	JO	Manager	
	Phone Ext	Mobile #		Email	horizonjon@trivest.net	Manager	Engineer	Jon Oster	
2	Sandy	Engandela	SE	101	Office Manager	SE	SE	Manager	
	Phone Ext	Mobile #	715-287-3456	Email	horizon@trivest.net	User	Engineer	Jon Oster	

Enhancement: Proposal/Print Menu: Optimize Window when Previewing Areas & Products report

The Proposal Areas & Products report now opens full screen so that you can see the entire report

Areas & Products

Zone 1 - Home Theater

This area includes the following products and features.

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

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.

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.

The surround sound processor will send the right sound to the right speakers to reproduce the movie theater sound as the director intended.

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.

	<u>Qty</u>	<u>Ext. Price</u>
Video		
Runco : DLP Projector	2 ea	\$15,990.00
Sony : Progressive Scan DVD Player	1 ea	\$1,099.95
Automation		
Linn : Knekt room control unit	1 ea	\$750.00
Linn : Universal learning remote	1 ea	\$390.00
	Equipment	\$18,229.95
	Misc. Parts + Wire & Cable	\$1,419.90
	Installation	\$719.33
	Zone 1 - Home Theater	\$20,369.18

Enhancement: Proposal & Project/Print Menu Posting: Increase the Speed of entering the Print Menu

All Proposal and Project Posting routines have been groomed, to improve totals accuracy and to maximize the speed of entering the Print Menu.

Discipline				Area				Phase				Proposal - Detail by Area				Utilities		Home			
Client				Areas				Area Text				Jim Engandela Horizon Software Home Entertainment System 1267.1-1.100				Pricing		Invoicing		Leave	
Project		Info		Products		Overviews		Payments		Purchasing						Tracker					
Contact		Log		Supplements		Install Notes		Project Fees		Work Orders						Print Menu					
Client Mode <input type="checkbox"/>		Super View		Labor Meter		QV		Wire Manager		Change Orders						Grand Total					
Discipline : Category : Type				Qty Make : Model				Description				Area & Product Totals									
Home Entertainment System																					
Zone 1 - Home Theater														20,369.18							
Video : Display : DLP Video Projector				2 ea		Runco : CL-610				DLP Projector				15,990.00							
Video : Source : DVD Player				1 ea		Sony : DVP-NS999ES				Progressive Scan DVD Player				1,099.95							
Automation : Remote : Handheld Remote				1 ea		Linn : 5101 Personal Handset				Universal learning remote				390.00							
Automation : Control : Keypad				1 ea		Linn : Knekt RCU				Knekt room control unit				750.00							
Zone 2 - Living Room														12,228.25							
Audio : Speaker : Center Channel				1 ea		Klipsch : RC-35				Center Channel Speaker				399.00							
Audio : Speaker : Floor				2 ea		Klipsch : RF-35				Reference Tower Speaker				998.00							
Audio : Speaker : Bookshelf				2 ea		Klipsch : RS-7				Reference Surround Speaker				900.00							
Audio : Speaker : Powered Subwoofer				1 ea		Klipsch : RSW-10				Reference 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							
Zone 3 - Office														9,790.19							

Enhancement: Proposal/Pricing: Discountable Total now updates automatically when entering this screen.

Discountable Total now updates automatically when enterin this screen and has been repositioned for better clarity.

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

LeRoy Asher Done

Pricing	Labor	Commissions	Home Entertainment System			
Tax Summary	Product Tax	Fees Tax	1292.1-1.100			

Proposal - Pricing Refresh

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	\$20,430.00	33.3%	\$13,620.00	\$6,810.00	-\$2,270.00	19:55:00
Installation	\$1,202.50	48.1%	\$624.17	\$578.33		
Misc. Parts	\$663.60	52.3%	\$316.44	\$347.16		
Wire & Cable	\$1,951.40	40.1%	\$1,169.40	\$782.00		
Additional Fees	\$707.52	50.0%	\$353.76	\$353.76		
Total	\$24,955.02	35.5%	\$16,083.77	\$8,871.25		
	\$1,311.14				\$27,225.02 List Price	
					-\$2,270.00 Courtesy Discount	
Grand Total	\$26,266.16				\$24,955.02 Total	

Proposal Equipment - Price Adjuster

Restore All Prices to Original Sell Adjust Prices by individual Products \$17,640.00 Discountable Equipment Sell Total Set All Prices to Minimum Sell Set Sell Price Adjustment based on \$ Amount \$

Adjustment Type:

Percentage %:

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 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.

Enhancement: Project and Final Change Order/Payment screen: New screen layout and functions

- The Payment Terms screen and programming has been completely reworked.
- All 3 Payments for all Payment Steps now function properly.
- Warning messages when creating an invoice, if the payment amount is empty or exceed the Payment Step total.
- You can now either enter just a payment amount or create and Invoice into either the Payment Steps or the Total Project on the far right.
- Choose to use either the Payment Steps to enter your payments or the total Project/CO Payment column (but don't use both)
- The Invoice history is now displayed on these screen so that you can review the Invoices created and Posted to date.

Final Change Order - Payment Director

Refresh Print ?

John & Mary Smith

Done

Installation Type
New-3 Phase Pre-Trim-Final

Home Entertainment System
1284.1c2-1.100

Enter Payments into **Payment Steps** or into **Total Project Payment**, but not both. Then click the Add button to Create & Post the Invoice

Payment Steps

Total Project Payment

Payment Description	Deposit Deposit	Phase 1 Payment Payment 1 Due 10 days before the installation final phase	Phase 2 Payment Payment 2 Due 10 days before the installation trim phase.	Phase 3 Payment Payment 3 Due 10 days before the installation final phase	Holdback Holdback	Total Project Payment
CO Payments Pymt Date Due	\$0.00	\$10,596.95	\$7,947.71	\$7,947.71	\$0.00	\$26,492.37
1 Paymt Amt Made Invoice Date Invoice Number Notes	Enter Payment Amt & Create Invoice <input type="text"/> +	Enter Payment Amt & Create Invoice \$22.00 + 5/11/2014 3074 - 1284.1c2-1.100	Enter Payment Amt & Create Invoice \$300.00 + 5/12/2014 3078 - 1284.1c2-1.100	Enter Payment Amt & Create Invoice <input type="text"/> +	Enter Payment Amt & Create Invoice <input type="text"/> +	Enter Payment Amt & Create Pymt Invoice <input type="text"/> +
2 Paymt Amt Made Invoice Date Invoice Number Notes	<input type="text"/> +	<input type="text"/> +	\$777.00 + 5/11/2014 3073 - 1284.1c2-1.100	\$3.00 + 5/11/2014 3077 - 1284.1c2-1.100	<input type="text"/> +	<input type="text"/> +
3 Paymt Amt Made Invoice Date Invoice Number Notes	<input type="text"/> +	<input type="text"/> +	\$4.00 + 5/11/2014 3076 - 1284.1c2-1.100	\$333.00 + 5/11/2014 3075 - 1284.1c2-1.100	<input type="text"/> +	<input type="text"/> +
- Total Payments		\$22.00	\$1,081.00	\$336.00		\$1,439.00
Balance Due	\$0.00	\$10,574.95	\$6,866.71	\$7,611.71	\$0.00	\$0.00

5/11/2014	3074 - 1284.1c2-1.100	\$22.00
5/12/2014	3078 - 1284.1c2-1.100	\$300.00
5/11/2014	3073 - 1284.1c2-1.100	\$777.00
5/11/2014	3076 - 1284.1c2-1.100	\$4.00
5/11/2014	3077 - 1284.1c2-1.100	\$3.00
5/11/2014	3075 - 1284.1c2-1.100	\$333.00

Payment Step Director Settings

Director: Director - Director

Step 1 Step 2 Step 3

1 2 3

Enhancement: Completed Projects: Change date to display Completed Date

This screen now shows the Date the Project was converted to a Completed Project

Find Completed		Fav A		B	C	Completed Projects																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		 User: Jim Engandela - 100 - Level: Administrator Location: 1 - EME Audio & Video Systems																						Leave		
Administrator																								Proposals		
Manager																								Projects		
User																								1 Completed		
= User Lock ID																										
Status	Dup	View	CO	Number	User	Client	Company	Project Title	Completed	Total	Fav															
				1287.1-1.100	Potter, Mike & Jessica			Commercial Security	9/12/2006	\$17,952																

Enhancement: Project/Change Orders/CO List Report: A list of CO Payment Invoices has been added under each CO

A list of CO Payment Invoices has been added under each CO that shows the Payment Invoice Date, Invoice Number and Total Invoice Payment Amount

EME Audio & Video Systems - Confidential Report							Page 1
Master Project - Change Order List							
John & Mary Smith							
Home Entertainment System							
1284.1c1-1.100							
Status	Date Created	CO Number	Change Order Title	CO Total	Pymts Made	Balance Due	
Final	5/9/2014	1284.1c1-1.100	Home Entertainment	\$10,964.82	\$48.60	\$10,931.82	
	5/9/2014	3045 - 1284.1c1-1.100		\$1.10			
	5/9/2014	3056 - 1284.1c1-1.100		\$2.20			
	5/9/2014	3062 - 1284.1c1-1.100		\$3.30			
	5/9/2014	3048 - 1284.1c1-1.100		\$1.10			
	5/9/2014	3057 - 1284.1c1-1.100		\$1.20			
	5/9/2014	3063 - 1284.1c1-1.100		\$1.30			
	5/9/2014	3049 - 1284.1c1-1.100		\$2.10			
	5/9/2014	3058 - 1284.1c1-1.100		\$2.20			
	5/9/2014	3064 - 1284.1c1-1.100		\$2.30			
	5/9/2014	3050 - 1284.1c1-1.100		\$3.10			
	5/9/2014	3059 - 1284.1c1-1.100		\$3.20			
	5/9/2014	3065 - 1284.1c1-1.100		\$3.30			
	5/9/2014	3051 - 1284.1c1-1.100		\$4.10			
	5/9/2014	3060 - 1284.1c1-1.100		\$4.20			
	5/9/2014	3066 - 1284.1c1-1.100		\$4.30			
	5/9/2014	3055 - 1284.1c1-1.100		\$5.10			
	5/9/2014	3061 - 1284.1c1-1.100		\$5.20			
	5/9/2014	3067 - 1284.1c1-1.100		\$5.30			
Final	9/12/2006	1284.1c2-1.100	Home Entertainment	\$26,492.37	\$1,139.00	\$0.00	
	5/11/2014	3074 - 1284.1c2-1.100		\$22.00			
	5/11/2014	3073 - 1284.1c2-1.100		\$777.00			
	5/11/2014	3076 - 1284.1c2-1.100		\$4.00			
	5/11/2014	3077 - 1284.1c2-1.100		\$3.00			
	5/11/2014	3075 - 1284.1c2-1.100		\$333.00			
Final	4/25/2007	1284.1c3-1.100	Home Entertainment	-\$1,427.78	\$11.00	\$0.00	
	9/12/2006			\$11.00			
Pending	5/7/2014	1284.1c4-1.100	Home Entertainment	\$4,711.10			

Enhancement: Contact/Entities: Show Created, Sold & Completed Dates

The Contact Entities screen now shows the Created Date, the Sold Date and the Completed Date

Contacts - Entities

Mike & Jessica Potter

Entity Defaults

25 of 31

Proposals - Projects - Change Orders - Completed Projects - Archived Proposals

View	Entity Kind	Number	User	Title	Created	Sold	Completed	Total	Delete
	Proposal	1272.1-1.100		Home Theater System	9/12/2006			\$30,646.68	
	Proposal	1272.2-1.100		Home Theater System	9/12/2006			\$30,646.68	
	Proposal	1282.1-1.100		Security System	9/12/2006			\$60,553.35	
	Original Project	1285.1-1.100		Home Theater System		9/12/2006		\$30,646.68	
	Completed	1287.1-1.100		Commercial Security System			9/12/2006	\$17,952.49	

Enhancement: POS/Purchase Orders: Hide All Costs Option

You can now choose to hide all Costs on your Purchase Orders, by checking this box, before you print.

POS - Purchase Order

OPEN
PO #7200

1 of 1

Hide All Costs

Vendor: Paul Klipsch
 Klipsch Audio Technologies
 3746 Speaker Lane
 Hope, AK 64763
 Home 875-398-9965
 Fax: 875-223-8575
 email: horizon@trivest.net

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

5/12/2014
 Open
 Need By

Buyer: Joe Buyer
 Reference:
 Reference 2:
 Ship VIA:
 FOB:
 Terms:

Pick	Qty	unit	Product Description (max 2 lines)	Unit Cost	Ext Cost	Qty Rcvd	Qty Open	Qty Delvd
	1	ea	Crestron : AAE : Adagio Audio Expander : Black	900.00	900.00		1	

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



Purchase Order
 PO #7200
 5/12/2014
 Ship To:
 Shop Warehouse:

Paul Klipsch
 Klipsch Audio Technologies
 3746 Speaker Lane
 Hope, AK 64763
 horizon@trivest.net

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@trivest.net

Need By	Reference	Ship VIA	FOB	Terms

Buyer	Reference 2
Joe Buyer	

Qty	Description	Price	Total
1	ea Crestron : AAE : Adagio Audio Expander : Black		

Please verify pricing prior to processing this order. Total:

Enhancement: POS/PO: Add User PO Number Option

You can now add your own PO Number to the SCPS PO Number for reference purposes.

Print Setup Delete PO Duplicate PO

POS - Purchase Order

Home

Print Store Copy

OPEN
PO #7200 - 1234567891234

Contact Done

Preview Hide All Costs

1 of 1

Set Up Prev Next

Vendor: User PO #: 1234567891234 Ship To: Shop Warehouse:

Paul Klipsch Klipsch Audio Technologies 3746 Speaker Lane Hope, AK 64763 horizon@trivest.net	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@trivest.net	5/12/2014 Open Need By <input type="text"/>
--	--	--	--

Buyer	Reference	Reference 2	Ship VIA	FOB	Terms	Receive All
Joe Buyer						

Pick	Qty	unit	Product Description (max 2 lines)	Unit Cost	Ext Cost	Qty Rcvd	Qty Open	Qty Delvd
	1	ea	Crestron : AAE : Adagio Audio Expander : Black	900.00	900.00		1	

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



Purchase Order
 PO #7200 -
 1234567891234
 5/12/2014

Paul Klipsch
 Klipsch Audio Technologies
 3746 Speaker Lane
 Hope, AK 64763
 horizon@trivest.net

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

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

Need By: Reference:

Buyer: Reference 2: Ship VIA: FOB: Terms:

Joe Buyer:

Qty	Description	Price	Total
1	ea Crestron : AAE : Adagio Audio Expander : Black		

Find PO's		POS - Purchase Order List															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
Archived PO's	Closed PO's	Open PO's	Open PO's															Done								
		14 Purchase Orders															QT	SI	CO	SO	WO	PO	RA	PT		
View Invoice	Company	Specialist	Date	Reference	Buyer	P.O. Status	P.O. Amount	Archive																		
<input type="checkbox"/>	PO #7200 - 1234567891234	Klipsch Audio Technologies	Jim Engandela	5/12/2014	Joe Buyer	Open		<input type="checkbox"/>																		
<input type="checkbox"/>	PO #7193	BTX		9/29/2005	Tina	Open	0.00	<input type="checkbox"/>																		

Enhancement: POS Invoices: Add New POS Invoice

Each POS Invoice has a Add New POS button that enables you to Add another POS Invoice from this screen. It takes you directly to the Pick Contact screen.

Print Setup		Delete	Add New POS	POS - Sales Invoice										Pick Price Cue	Home	
Print	Hide Labor Detail Matrix			Invoice										Contact	Done	
Preview	Packing List			SI #7205										1 of 1	Set Up	Prev Next
Cyrissa Brain 567 58TH Street Oakland, CA 94607		Home 608-985-143		Label Address 2:		Cyrissa Brain		5/13/2014								
Sales Rep	Terms	Ship VIA	Date	Payment	Check Number	Reference #										
Jim Engandela	Standard Payment Terms															
Pick	Qty	unit	Product Description (max 2 lines)			Install (h:m:s)	Unit Price	Ext Price	Tax A	Tax B						
<input type="checkbox"/>	2	ea	Crestron : CNAMPX-2X60 : 2 Channel Amplifier : Black			1:00:00	1,000.00	2,000.00	T	T						

Enhancement: POS/All Invoices: Add Email button to All POS Invoices

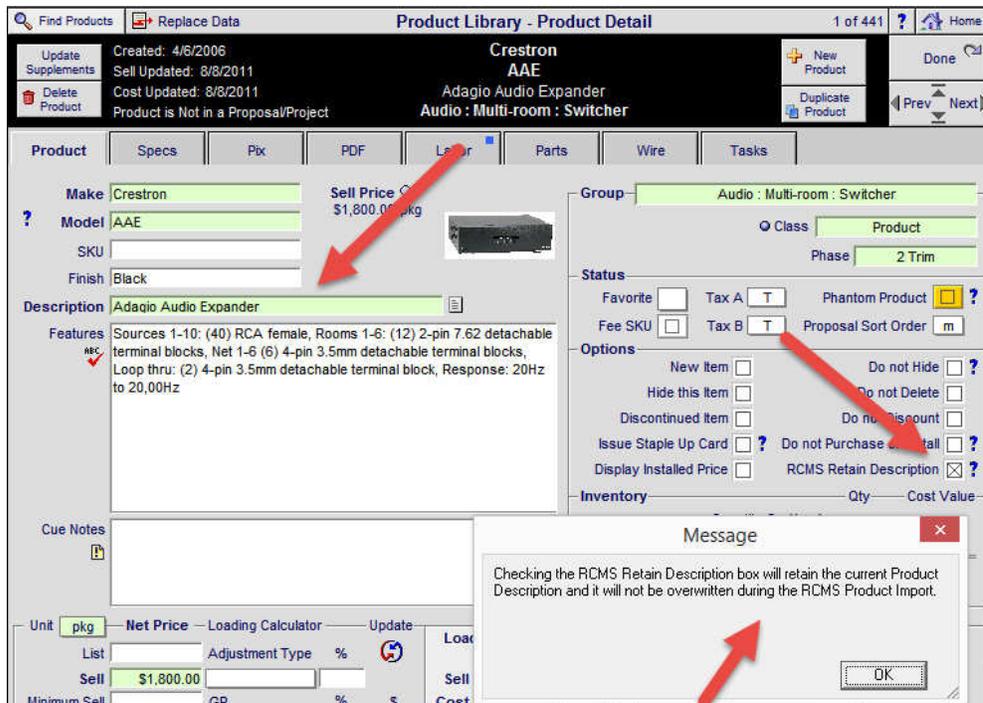
You can now send an email directly from All of the POS Invoices, providing the Contact information contains an email address.



The screenshot shows a 'POS - Purchase Order' form. At the top, there are navigation buttons: Print Setup, Delete, Duplicate, Add New, and Home. Below these are 'Print', 'Store Copy', 'Preview', and 'Hide All Costs'. The main header displays 'OPEN PO #7200 - 1234567891234' and '1 of 14'. The form is divided into several sections: Vendor information (Paul Klipsch, Klipsch Audio Technologies, 3746 Snaker Lane, Horsham, PA 19039, Home 875-398-9965, Fax: 875-223-8575, email: horizon@trivest.net), User PO # (1234567891234), Ship To (Shop Warehouse), and a 'Need By' date (5/12/2014). There are also fields for Buyer (Joe Buyer), Reference, Reference 2, Ship VIA, FOB, and Terms. A table at the bottom lists items with columns for Pick, Qty, unit, Product Description, Unit Cost, Ext Cost, Qty Rcvd, Qty Open, and Qty Delvd. A red arrow points to an 'eMail' button next to the vendor's email address.

Enhancement: Product Library/Product Detail: RCMS Retain Description Option

Checking the RCMS Retain Description box will retain the current Product Description and it will not be overwritten during the RMS Product Import.



The screenshot shows a 'Product Library - Product Detail' form for a 'Crestron AAE Adagio Audio Expander'. The form includes fields for 'Make', 'Model', 'SKU', 'Finish', and 'Description'. A red arrow points to the 'Description' field. On the right side, there are 'Status' and 'Options' sections. The 'Options' section includes a checkbox for 'RCMS Retain Description', which is checked. A 'Message' dialog box is open at the bottom, displaying the text: 'Checking the RCMS Retain Description box will retain the current Product Description and it will not be overwritten during the RMS Product Import.' Another red arrow points to the 'OK' button in the message box.

Fix: Master Prefs/Groups: Changing Group Class or Phase does not error

You can now change the Product Class or Primary Install Phase when renaming a Group without receiving an error message.

The screenshot shows the 'Master Preferences - Product Groups' dialog box. At the top, there are 'Previous' and 'Next' buttons, and a 'Cancel' button on the right. The main area contains a table with columns: Discipline, Category, Type, Product Classification, and Primary Install Phase. Below the table is a 'Name Product Group' form with a 'Done' button. Two red arrows point from the 'Done' button to the 'Product Classification' and 'Primary Install Phase' fields in the table below the form.

Discipline	Category	Type	Product Classification	Primary Install Phase
Audio	Amplifier	Surround Processor	Product	1 Prewire

Do not exceed field lengths and do not enter carriage returns
The Category field can be blank, by renaming it, but not the Discipline or Type.

Fix: Project/Change Orders: Printed Report CO Total matches CO screen Total

The CO Total on the Change Order report now matches the screen CO Total
Also the windows is now optimize during report preview so that you can see the entire screen.

Update CO Totals		Final Change Order - Current Change Orders					Print	Home
All Projects Change Orders		John & Mary Smith					Add New Change Order to This Project	
= User Lock ID		Home Entertainment System 1284.1-1.100					This Project	
Current Change Orders								
View	Status	Date Created	CO Number	Change Order Title	CO Total	Pymts Made	Balance Due	Del
	Pending	9/12/2006	1284.1c1-1.100	Home Entertainment System	\$13,805.86			
	Final	9/12/2006	1284.1c2-1.100	Home Entertainment System	\$26,492.37	\$255.00	\$26,237.37	
	Final	4/25/2007	1284.1c3-1.100	Home Entertainment System	-\$1,427.78		-\$1,427.78	

EME Audio & Video Systems - Confidential Report							Page 1
5/7/2014							
Master Project - Change Order List							
John & Mary Smith							
Home Entertainment System							
1284.1c1-1.100							
Status	Date Created	CO Number	Change Order Title	CO Total	Pymts Made	Balance Due	
Pending	9/12/2006	1284.1c1-1.100	Home Entertainment	\$13,805.86			
Final	9/12/2006	1284.1c2-1.100	Home Entertainment	\$26,492.37	\$255.00	\$26,237.37	
Final	4/25/2007	1284.1c3-1.100	Home Entertainment	-\$1,427.78		-\$1,427.78	

Fix: Change Order/Printed CO: Discount totals are now posted for improved accuracy.

Discount totals are now posted for improved accuracy.

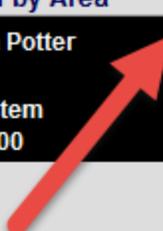
Final Change Order 1284.1c2-1.100	Change Order	Date 5/12/2014
Zone 3 - Office		
Video		
Sony : KDE-50XS955 : 50" Plasma Television : Silver	1 ea	\$7,249.95
Sony : KV-27FS13 : 27 FD Trinitron® WEGA® TV	1 ea	\$549.99
	Equipment	\$7,799.94
	Installation	\$300.00
	Wire & Cable	\$199.90
	ZONE 3 - OFFICE	\$8,299.84
Electronics & Installation		
	Equipment	\$22,294.94
	Installation	\$535.00
	Misc. Parts	\$95.00
	Wire & Cable	\$1,083.65
	Additional Fees	\$1,163.31
\$25,421.90 List Price		
-\$250.00 Courtesy Discount		
\$25,171.90 Total		
	Total	\$25,171.90
	Tax	\$1,320.47
	Grand Total	\$26,492.37
Prices quoted are guaranteed until: 5/12/2014		
Payment Terms		
Payment 1	Due 10 days before the installation final phase	\$10,596.95
Payment 2	Due 10 days before the installation trim phase.	\$7,947.71
Payment 3	Due 10 days before the installation final phase	\$7,947.71
Please Authorize & Return		
Date:	John & Mary Smith or authorized signature on clients behalf	
Payment Method	Credit Card Type	Credit Card Number
		Payment Amount

SCPS 11.1v1 Upgrade New Features, Enhancements and Fixes 3-13-2014

Enhancement: Proposal Detail: Print Proposal Detail screen

You can now print the Proposal Detail screen. This is a handy quick report for reviewing your proposal.

The QuickView button has also been moved to the upper left header. It enables you to view your Products or Contacts Library and return to this screen without having to leave your Proposal.

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

Proposal - Detail by Area				
Mike & Jessica Potter				
Security System 1282.1-1.100				
Discipline	Qty	Make : Model	Description	Area & Product Totals
Security System				
Zone 1 - Basement				27,146.98
Audio	1 ea	Linn : 5125	Five channel power	2,750.00
Audio	5 pr	Linn : Katan	Bookshelf	4,975.00
Audio	1 ea	Linn : Melodik	Aktive isobarik bass	4,950.00
Video	1 ea	Runco : CL-610	DLP Projector	7,995.00
Video	1 ea	Sony : DVP-NS999ES	Progressive Scan	1,099.95
Automation	1 ea	Linn : 5101 Personal Handset	Universal learning	390.00
Automation	1 ea	Linn : Knekt RCU	Knekt room control	750.00
Zone 1 - Home Theater				27,146.98
Audio	1 ea	Linn : 5125	Five channel power	2,750.00
Audio	5 pr	Linn : Katan	Bookshelf	4,975.00
Audio	1 ea	Linn : Melodik	Aktive isobarik bass	4,950.00
Video	1 ea	Runco : CL-610	DLP Projector	7,995.00
Video	1 ea	Sony : DVP-NS999ES	Progressive Scan	1,099.95
Automation	1 ea	Linn : 5101 Personal Handset	Universal learning	390.00
Automation	1 ea	Linn : Knekt RCU	Knekt room control	750.00

Enhancement: Proposals: Alternate Proposal Contract Signature Names

You can now choose to use the Salesman's name on your Proposal Contracts or an Alternate Name and Title such as the President.

This feature is Global affects all Proposals currently in SCPS, but not Projects or Completed Projects.

Go into the Master Preferences/Proposals/Proposal Print Option screen to make enable this feature.

Master Proposal Prefs - Cover Page				Print	?	Home
Cover Page	Text & Fees	Contracts	Proposal Print Options	Update All Existing Proposals & Projects	Custom Report Bullet Points & Shop Text	Done
Client Intro	Overviews	Terms				
Shop Intro	Extra Pages	Pricing				
Location <input type="text" value="1"/>						

Check the Use Contract Alternate Signature box and enter the Alt Name and Alt Title

Printer Setup Master Prefs - Proposal Print Options ? Home

hp LaserJet 1320 PCL 5, winspool,Ne02: 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

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

Show Tax Totals

Yes No Include Sales Tax in the Grand Total
Do not show tax separately

Contract - "Warranty Terms"

Factory Extended Warranty Terms

Contract - "Alternate Signature"

Use Alternate Contract Signature name, instead of Salesman's name.

*This is a Global feature and affects all Proposals.
Custom Reports Users should upgrade to Reports 11.1v1*

Alt Name	Alt Title
Joe Oster	Sales Manager

Printed Contract Signature Name

Please Authorize & Return

Date: _____ LeRoy Asher or authorized representative on clients behalf

Date: _____ Jon Oster, Sales Manager

Enhancement: Proposal/Print Menu/Contract: Extended Warranty Approve or Decline

You now have the option to show or not show an "Approve or Decline Extended Warranty" line on the Proposal Contract.

To enable this feature for new Proposal. go into the Master Preferences/Proposal/Proposal Print Options screen and check the Show box.

To enable this feature for existing Proposals, go into the Proposal Print Menu/Print Options screen and check the Show box.

Printer Setup | Master Prefs - Proposal Print Options | Home

hp LaserJet 1320 PCL 5, winspool,Ne02: 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)

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

Yes No Include Sales Tax in the Grand Total
Do not show tax separately

Contract - "Warranty Terms"

Factory Extended Warranty Terms

Contract - "Alternate Signature"

Use Alternate Contract Signature name,
instead of Salesman's name.

*This is a Global feature and affects all Proposals in SCPS.
Custom Reports Users should upgrade to Reports 11.1v1*

Alt Name Alt Title

Contract - "Extended Warranty Approval - Decline"

Show Extended Warranty Approve/Decline Option

Approve or Decline Extended Warranty
(Please Initial) Approve _____ Decline

Electronics & Installation

	Equipment	\$45,819.90
	Installation	\$1,991.67
	Misc. Parts	\$400.00
\$57,767.18 List Price	Wire & Cable	\$6,082.40
<u>- \$200.00</u> Courtesy Discount	Additional Fees	\$3,273.22
\$57,567.18 Total	Total	\$57,567.18
	Tax	\$2,986.17
	Grand Total	\$60,553.35

Prices quoted are guaranteed until: 5/4/2014

Payment Terms

Deposit	Due when the proposal is accepted and signed.	\$6,055.34
Payment 1	Due 10 days before the installation prewire phase.	\$18,166.01
Payment 2	Due 10 days before the installation trim phase.	\$12,110.67
Payment 3	Due 10 days before the installation final phase.	\$18,166.01
Hold Back	Due at the completion of the installation.	\$6,055.34

Price Guarantee

Products & Installation prices are estimated. Total price will consist of installed products & actual installation. All labor, materials, trip charges and Monitors Cables listed within this proposal are estimates only. An actual bill for all labor, materials, trip charges and cables will be hand written for each day of work and is due upon completion of each workday.

Please Authorize & Return

Approve or Decline Extended Warranty (Please Initial) Approve _____ Decline _____

Date: Mike & Jessica Potter or authorized signature on clients behalf

Date: Jim Engandela, President

Enhancement: Proposal/Pricing: Sell Price Adjuster based on Discountable Sell Total

Each Product in a Proposal or in the Product Library can be set to "Do Not Discount".

The Automatic Pricing Adjuster utility now uses the Total Sell Price of all the Products in the Proposal that are not set to "Do Not Discount", instead of using the Total Equipment Sell price.

The Discountable Equipment Sell Total is now displayed on the pricing screen.

This makes entering a positive or negative flat discount amount in the Price Adjuster more accurate.

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

Rick Schwamb Done

Home Automation
1290.1-1.100

Proposal - Pricing Refresh

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	\$3,000.00	38.5%	\$1,845.00	\$1,155.00	-\$200.00	8:40:36
Installation	\$556.22	45.6%	\$302.67	\$253.55		
Misc. Parts	\$373.33	40.0%	\$224.00	\$149.33		
Wire & Cable	\$759.00	44.3%	\$423.00	\$336.00		
Additional Fees	\$356.32	51.7%	\$172.16	\$184.16		
Total	\$5,044.88	41.2%	\$2,966.83	\$2,078.05		
Tax	\$257.87					
Grand Total	\$5,302.75					

\$5,244.88 List Price
-\$200.00 Courtesy Discount
\$5,044.88 Total

Proposal Equipment - Price Adjuster

Adjustment Type:

Percentage %: ±

\$ ±

Discountable Equipment Sell Total

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 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.

Super View		Area Sum	Prod Sum	<input type="checkbox"/> Clint Mode	Proposal - Products			Total \$3,000.00			
Areas		Text	Products		Rick Schwamb			Update All Products	Delete All Options	Done	
Labor	Parts	Wire	Tasks		= Orphan	Phantom =	Auto Price Adjuster	Update Tagged Products	Switch Tagged Products	Product Install Notes	
View	Option	Qty	Zone - Area	Make	All 3 Products		Product Labor	Unit List	Unit Sell	Ext Sell	
Tag	No \$	Change	Discipline	Category	Model	Description	Parts Labor	Unit Cost	Unit Sell	Ext Installed	
Del	No Disc	Product Group	Phase	Type			Wire Labor	Updated	GP%	Ext Discount	
	<input type="checkbox"/>	2 ea	1 - Playroom	Klipsch	RSW-10	Reference Subwoofer :	297.38		909.09	1,818.18	
	<input type="checkbox"/>		3 Final	Speaker		Black Ash	190.00	525.00	1,000.00	2,297.38	
	<input type="checkbox"/>		1290.1	Powered Subwoofer			318.75	8/8/2011	42.3%	-181.82	
	<input type="checkbox"/>	1 ea	1 - Playroom	Sonance	CR801 : 91807	8" In-Ceiling CR801	258.84		181.82	181.82	
	<input type="checkbox"/>		2 Trim	Speaker			183.33	75.00	200.00	458.84	
	<input type="checkbox"/>		1290.1	In-wall			121.50	8/8/2011	58.8%	-18.18	
	<input type="checkbox"/>	1 ea	1 - Playroom	Middle Atlantic	ASR-42-HD : ASR-42-HD	6 shelf adjustable slide out		720.00	1,000.00	1,000.00	
	<input type="checkbox"/>		1 Prewire	Rack		Black	0.00	8/8/2011	28.0%	1,000.00	
	<input checked="" type="checkbox"/>		1290.1	Equipment Rack							

Delete Product		Client Mode <input type="checkbox"/>	Proposal - Product Detail			3 of 3				
Areas		Text	Products	Rick Schwamb			Proposal Detail			
Labor	Parts	Wire	Tasks	1290.1-1.100			◀ Prev Next ▶			
				Middle Atlantic : ASR-42-HD						
				Furniture : Rack : Equipment Rack						
Product	Specs	Pix - PDF's	Labor	Parts	Wire	Tasks	1 - Playroom			
Qty	1						Group	Furniture : Rack : Equipment Rack		
Make	Middle Atlantic	Sell Price					Change Group	Original Group	Furniture	
Model	ASR-42-HD	\$1,000.00 EA					Product Classification	Product		
SKU	ASR-42-HD						Primary Install Phase	1 Prewire		
Finish	Black						Tax A	<input type="checkbox"/> T	+ Tax B <input type="checkbox"/> T	
Description	6 shelf adjustable slide out rotating equipment rack						Do not Discount	<input checked="" type="checkbox"/>	Product Sort	g
Features							Exclude \$ from Totals	<input type="checkbox"/>	Discontinued Item	<input type="checkbox"/>
Cue Notes							Show Product as Option	<input type="checkbox"/>	Issue Staple Up Card	<input type="checkbox"/>
							Do not Purchase or Install	<input type="checkbox"/> ?		
							Purchasing			
							Purchasing Lead Days	15		
							Default Vendor	Middle Atlantic Products, Inc.		
							Alternate PO Vendor ?	Alt PO Cost		
							Use Alt	<input type="checkbox"/>		
Unit	Unit Price	Adjustment	Product Unit Price w/Adjustment	Parts Unit Price	Wire Unit Price	Unit Installed Price	Product	\$1,000.00		
EA	List		\$1,000.00			Parts	\$0.00			
	Sell		\$1,000.00			Wire	\$0.00			
	Minimum Sell		\$950.00	Unit Sell		Labor		GP%		
	Loaded Cost		\$720.00	Total Price		Total	\$1,000.00	28.0%		
	Raw Cost		\$720.00	Labor Time		Time				

Enhancement: Project List: Multiple Project Completion Utility

You can now Complete Multiple Projects at one time. Of course you can still use the regular Project Utility (within a Project), but this Multiple Completion Utility makes it easy to Complete Projects that perhaps were not Completed at the time they were actually Completed. The Project List screen should really only show active projects and this Utility will help you clean the list.

Only Users logged in as Administrators and have Rights to Convert Proposals & Projects can use this Utility.

Access Level

Administrators see all Proposals & Projects
Managers see their Proposals & Projects and the users that they manage
Users only see their Proposals & Projects

Proposals - Projects - Completed Archives - Change Orders

Delete Duplicate

Convert Proposals - Projects

Conversions
Proposal > Project > Completed

Click the Multi-Complete Utility button on the Project List screen.

Status	Dup	View	CO	Number	User	Client	Company	Project Title	Sold	Total	Fav	
				1288.1-1.100		Engandela, Jim	Horizon Software	Home Entertainment	4/25/2007	\$6,959	<input type="checkbox"/>	<input type="checkbox"/>
				1285.1-1.100		Potter, Mike & Jessica		Home Theater System	9/12/2006	\$30,647	<input type="checkbox"/>	<input type="checkbox"/>
				1284.1-1.100		Smith, John & Mary		Home Entertainment	9/12/2006	\$95,624	A	<input type="checkbox"/>
				1275.1-1.100		Goss, Dennis		Central Vacuum System	9/12/2006	\$25,584	<input type="checkbox"/>	<input type="checkbox"/>
				1273.1-1.100		Hawn, Dr.	Chippewa Valley Eye Clinic	Home Entertainment	8/9/2011	\$65,758	<input type="checkbox"/>	<input type="checkbox"/>
				1268.1-1.100		Berkow, Dana		Home Entertainment	9/12/2006	\$70,560	<input type="checkbox"/>	<input type="checkbox"/>

Check the Project Completion checkboxes that you want to Complete and then click the Complete Projects button.

The Auto Check button will either Check All of your Projects and then you can Uncheck the ones you don't want to Complete or the Auto Check button will Uncheck all of the Projects.

You can use the Alpha-Finder and the Show All and the Show Checked buttons to Find and see what Projects you want to Complete.

The Completion Date of each Project will be Auto Set to the date you run this Utility.

The screenshot shows the 'Complete Multiple Projects Utility' interface. At the top, there is a search bar with 'Find Projects' and 'Fav A B C' options. Below this is a grid of project data with columns for Status, CO Number, User, Client, Company, Project Name, Date, Total, and Fav. The 'Fav' column contains checkboxes. On the right side, there are buttons for 'Show All', 'Show Checked', 'Auto Check', and 'Complete Projects'. A red arrow points to the 'Show Checked' button, another to the 'Complete Projects' button, and a third to the checkboxes in the 'Total Fav' column. The EME audio & video logo is visible in the center of the interface.

Status	CO Number	User	Client	Company	Project Name	Date	Total	Fav
<input type="checkbox"/>	1288.1-1.100	Engandela, Jim	Horizon Software	Home Entertainment	4/25/2007	\$6,959	<input type="checkbox"/>	
<input type="checkbox"/>	1286.1-1.100	Hagen, Gary	Whole House Music	9/12/2006	\$17,666	<input type="checkbox"/>		
<input type="checkbox"/>	1285.1-1.100	Potter, Mike & Jessica	Home Theater System	9/12/2006		<input type="checkbox"/>		
<input type="checkbox"/>	▶ 1284.1-1.100	Smith, John & Mary	Home Entertainment	9/12/2006	\$95,624	A	<input type="checkbox"/>	
<input type="checkbox"/>	1275.1-1.100	Goss, Dennis	Central Vacuum System	9/12/2006	\$25,584	<input type="checkbox"/>		
<input type="checkbox"/>	▶ 1273.1-1.100	Hawn, Dr.	Chippewa Valley Eye Clinic	Home Entertainment	8/9/2011	\$65,758	<input type="checkbox"/>	
<input type="checkbox"/>	1268.1-1.100	Berkow, Dana	Home Entertainment	9/12/2006	\$70,560	<input type="checkbox"/>		

Enhancement: Project Install Notes: General Improvements to entire module

- The Project Install notes contain an Overview, Area notes and Product notes.
- The Product Install notes can appear in the Project Work Order and in the Area & Products Proposal section and there is a Print Option of this.
- Project Install notes can be printed as a separate report from the Install Notes Module, the Work Order Module or the Project Print Menu.
- The Project Install Notes module can be accessed from the main Proposal and Project Detail by Area screens.

Discipline	Area	Phase	QV	Proposal - Detail by Area			Utilities	▼ ▲ ▾ ▿ ?	Home
Client	Areas	Area Text	Mike & Jessica Potter Security System 1282.1-1.100			Pricing	Invoicing	Leave	
Project	Info	Products				Overviews	Payments	Purchasing	Tracker
Contact	Log	Supplements				Install Notes	Project Fees	Work Orders	Print Menu
Client Mode <input type="checkbox"/>	Super View	Labor Meter					Wire Manager	Change Orders	Grand Total
Discipline : Category : Type			Qty	Make : Model	Description	Area & Product Totals			
Security System									
Zone 1 - Basement						27,146.98			

Service Tickets	Show All	Phase 1 2 3	Install Work Orders - All - 7 Products			PO	WO	SI	▼ ▲ ▾ ▿ ?	Home
Install Notes	Mike & Jessica Potter 1285.1-1.100			Labor Time Remaining on Project Project Time 15:20:00 Installed Time 0:00:00 Labor Time Left 15:20:00		Totals Products 11 Parts 0 Wire 0		Left To Install 11 Left to Complete 3 757	Create WO Auto Set Qty to Issue	Leave
Wire Manager	WO Products	WO Parts	Wire	Sum	Proj	Orphan			View Work Orders	
Phase	Zone - Area	Qty Sold	Make : Model	Qty to Issue	WO's to Date					
Discipline	Delivered	CO#	Install Description	Finish	Left to Issue	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	0	1			1	1
3	1 - Home Theater Audio	5 pr	Linn : Katan Bookshelf loudspeakers: pair	Black	0	5			5	5

The Install Notes module enables you to enter Project Overview text and by clicking on each Zone-Area you can enter Area Text into that Area and Product Install notes in each Product within that Area. You can also view the normal Proposal Area text for each area as a reference.

Pick	Zone	1 - Pick Area
	1	Basement
	1	Home Theater

Install Notes - Project Overview

Install Notes - Project Overview:

This Overview text can be used to as a guideline for Installers.

2 - Products in: Zone 1 - Basement
 Editable - Product Install Notes
 Permanent - Product Install Notes

CO#
Linn : 5125
Linn : Katan
Linn : Melodik
Runco : CL-610
Product Install Notes are specific to each product and can detail product install locations or installer notes. Chief Mounts: RPA-U, RPA-129
Sony : DVP-NS999ES
Linn : 5101 Personal Handset
Product Install Notes are specific to each product and can detail product install locations or installer notes. Permanent Product Install Notes are stored in the Product Library and can specify required parts or other
Linn : Knekt RCU

3 - Area Install Notes for: Zone 1 - Basement

Area Install Notes are specific to each Area

Area Text for: Zone 1 - Basement

This area includes the following products and features.

The design goal of this home theater is to recreate the movie theater sound to broadcast standards, so the artistic values of the movie director will be faithfully reproduced. this audio and video system will also blend in harmoniously with the decor of your home. eme is a licensed

3/10/2014	Project Install Notes		1
Mike & Jessica Potter			
Security System			
1282.1-1.100			
Security System			
Install Notes - Project Overview:			
This Overview text can be used to as a guideline for Installers.			
Zone 1 - Basement			
Area Install Notes are specific to each Area			
Audio	1 ea	Linn : 5125	
Audio	5 pr	Linn : Katan	
Audio	1 ea	Linn : Melodik	
Video	1 ea	Runco : CL-610	
		Product Install Notes are specific to each product and can detail product install locations or installer notes. Chief Mounts: RPA-U, RPA-129	
Video	1 ea	Sony : DVP-NS999ES	
Automation	1 ea	Linn : 5101 Personal Handset	
		Product Install Notes are specific to each product and can detail product install locations or installer notes. Permenant Product Install Notes are stored in the Product Library and can specify required parts or other install notes.	
Automation	1 ea	Linn : Knekt RCU	
Zone 1 - Home Theater			
home theater area'niniennw			
Audio	1 ea	Linn : 5125	
Audio	5 pr	Linn : Katan	
		iouiyutytr	
Audio	1 ea	Linn : Melodik	
Video	1 ea	Runco : CL-610	
		dfshgh Chief Mounts: RPA-U, RPA-129	
Video	1 ea	Sony : DVP-NS999ES	
Automation	1 ea	Linn : 5101 Personal Handset	
		Permenant Product Install Notes are stored in the Product Library and can specify required parts or other install notes.	
Automation	1 ea	Linn : Knekt RCU	

The Product Install Notes can be printed on each of the Areas & Products section when the Print Option for this feature is checked.

The number of lines for Product Install Notes has been increased to 20 lines.

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

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

Home Theater System 1285.1-1.100 Send Email
 Client Manager
 Salesman Engineer Prefs

Proposals Projects Costing Custom Print Options

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

Proposal Summaries

Print All

Proposal Summary

- Discipline
- Area
- Phase

Sub Total Summary

- Discipline
- Area
- Phase

Grand Total Summary

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

Printer Setup **Proposal/Project Prefs - Print Options** ? Home

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

Home Theater System 1285.1-1.100 Push Contract Lines

Company Location

Company Location
EME Audio & Video Systems

Areas & Product Report - "Formatting"

Yes No Page Break after each Area

- Products - Do not Sort products by Discipline
- Products - Show Product Install Notes
- Hide Area Text
- Show Area Text - No Products
- Sort Areas by: Zone/Location/Placement/Area
Normal Sort = Location/Zone/Placement/Area
- Hide Footer Initials Initials _____

Contract - "Selection"

Default Use Contract 1 Contract 1
 Use Contract 2 Contract 2
 Use Contract 3
 Use Contract 4
 Use Contract 5

Contract - "Subtotals"

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

Enhancement: Project/Payments: Round all Balance due totals to prevent .01 values

All Balance Due totals in the Payment Summary screen now have rounding built into the calculations to prevent .01 values that potentially can appear.

Admin Utility	Project - Payment Summary					Refresh	Print	?
Gary Hagen							Done	
Installation Type New-3 Phase Pre-Trim-Final							View All Change Orders	
Whole House Music System 1286.1-1.100								
Payment Terms								
Payment Method Percentage Payment Description	Deposit Deposit Due when the proposal is accepted and signed.	Step 1 Payment Payment 1 Due 10 days before the installation prewire phase.	Step 2 Payment Payment 2 Due 10 days before the installation trim phase.	Step 3 Payment Payment 3 Due 10 days before the installation final phase.	Holdback Hold Back Due at the completion of the installation.	Totals		
Original Project								
Project Payments	\$1,766.57	\$5,299.70	\$3,533.13	\$5,299.70	\$1,766.57	\$17,665.66		
Pymt Date Due	3/14/2012	3/14/2012	4/13/2012	5/13/2012	5/13/2012			
Add Payment Invoice	+ Invoice Pymt Amt	+ Invoice Pymt Amt	+ Invoice Pymt Amt	+ Invoice Pymt Amt	+ Invoice Pymt Amt	+ Invoice Total Pymt Amt		
Date Invoiced								
1 Payment Amt Made	\$1,766.57					\$1,766.57		
Pymt Made Dates								
Pymt Notes								
2 Payment Amt Made								
Pymt Made Dates								
Pymt Notes								
3 Payment Amt Made								
Pymt Made Dates								
Pymt Notes								
- Total Payments	\$1,766.57					\$1,766.57		
Balance Due	\$0.00	\$5,299.70	\$3,533.13	\$5,299.70	\$1,766.57	\$15,899.09		
All Final Change Orders								
CO Totals								
- Payments Made								
Balance Due								
Master Project Includes Original Project & All CO's								
Master Proj Totals	\$1,766.57	\$5,299.70	\$3,533.13	\$5,299.70	\$1,766.57	\$17,665.66		
- Payments Made	\$1,766.57					\$1,766.57		
Total Balance Due	\$0.00	\$5,299.70	\$3,533.13	\$5,299.70	\$1,766.57	\$15,899.09		

Enhancement: Project/UtilityAdmin: Warning Message added to Project Utilities

All Repost Utilities now have warning messages so that you can cancel the operation if you choose.

The screenshot shows a software interface for Project Utilities. A modal dialog box titled "Message" is displayed in the center, containing the text: "Caution! This utility will repost all totals on ALL Projects and Proposals in SCPs. It can take a long time to process and might change numbers you have already presented to clients." Below the text are two buttons: "Repost All" and "Cancel". A red arrow points from the "Repost All" button in the dialog to the "Repost Project Payment Totals" button in the main interface. Another red arrow points from the "Cancel" button in the dialog to the "Repost Project Payment Totals" button. The main interface lists four utility options, each with a small icon of a yellow building with blue pipes:

- Repost Project Payment Totals (on this Project only)
- Repost Project Totals (on All Projects, please be patient)
- Repost Final Change Order Totals (on all Projects, please be patient)
- Clear All Payments Made, Dates & Notes from all Master Project Change Orders

Enhancement: Projects/Purchase Orders: Expand PO Notes & Comments field

The PO Notes & Comments field has been expanded on screen and on the printed PO to hold 4 lines of text.

The screenshot shows the "Project - Purchase Order Detail" screen. The PO Number is 1091 - 1285.1-1.100. The Vendor Address is Linn Products, 8787 Perimeter Park Blvd., Jacksonville, FL 32216 USA. The Ship To Address is EME Audio & Video Systems, 100 Purchasing Lane, Purchasing City, WI 537. The PO Total is \$8,289.00. The PO Comments & Notes field is expanded to hold 4 lines of text, indicated by a red arrow. The field contains the following text:

```
AAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA
BBBBBBBBBBBBBBBBBBBBBBBBBBBBBBBBBBBBBBB
CCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCC
DDDDDDDDDDDDDDDDDDDDDDDDDDDDDDDDDDDD
```

Order Qty	Buy Qty	Make	Description	Model	Finish	Unit	Raw Cost	Ext	Raw Cost
1 ea		Linn	5101 Personal Handset		Black		\$234.00		\$234.00
1 ea			Universal learning remote		note:				

Enhancement: Projects/Purchase Orders: Print each PO on new Page & Print from Print Menu

The PO Summary report now print each PO on a new page for better clarity. You can now print the PO summary report from the Project/Print Menu, Project screen and well as the Project/PO/View PO screen.

Printer Setup PDF reDirect Copy

Project - Print Menu - Project Shop Refresh Reports ? Home

PDF reDirect Pro v2, winspool, Ne01: **Jim Engandela** Done

Horizon Software

Home Entertainment System

1288.1-1.100 Project Approval 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
- Material Product Delivery Form
- Project Purchase Order Summary

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

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

Setup

Project - Purchase Order List Print PO Summary ?

Mr. **Jim Engandela** Done

Horizon Software

Home Entertainment System

1288.1-1.100 Print & Post All PO's Post All PO's

Show All PO's Global PO Module

Posted PO's

Not Posted PO's

PO #	PO Date	Vendor	PO Total	Project	Client	Posting Date	Print Post	View
1091	3/10/2014	Linn Products	\$2,427.00	1288.1-1.100	Jim Engandela - Horizon Software	3/10/2014		
1092	3/10/2014	Klipsch Audio Technologies	\$236.50	1288.1-1.100	Jim Engandela - Horizon Software	3/10/2014		

PO Number 1091 - 1288.1-1.100 17627 User PO number	EME Audio & Video Systems	PO Date 3/10/2014			
Purchase Order					
Vendor: Linn Products 8787 Perimeter Park Blvd. Jacksonville, FL 32216 USA	Ship to: EME Audio & Video Systems 100 Purchasing Lane Purchasing City WI 567937				
Project Reference 1288.1-1.100	Project Jim Engandela - Horizon Software	Buyer Joe Buyer			
		Phone 715-287-3335			
		Fax 715-287-4464			
Terms	Shipping Best Way	Special Instructions			
Qty	Make	Model	Finish	Cost	Ext Cost
1 ea	Linn	Classik Musio-S	Silver	930.00	930.00
1 pr	Linn	Katan-C	Cherry	597.00	597.00
2 ea	Linn	Knekt RCU	White	450.00	900.00
Total					\$2,427.00

Enhancement: Projects/Change Orders: Control changing Negative & Positive Quantity Parts & Wire

When removing a Product and it's Parts & Wire Supplements, from a Project through a Change Order, it is important to remove the exact same Quantity of Parts & Wires that the original Product had.

For this reason, Parts & Wire Supplements with a Negative Qty are not allowed to be changed, but Parts & Wire Supplements with a Positive Qty are allowed to be changed. This function is controlled on both the CO Supplement List screens and the CO Supplement Detail screens.

This is true for both the Quantities and switching from Home run to Room run on Bulk Wire.

All Supplements Delete All Wire Restore Labor **Pending CO - Wire Supplements** Phantom = Adjust Bulk Wire - Home Runs Home

LeRoy Asher
Home Entertainment System
1294.1c1-1.100

Wire Detail 10000 Sq Ft
120 ft per Home Run Done

Wire Summary Adjust Bulk Wire - Room Runs Wire Manager

100 % Update

All Areas Wire Supplements Itemized Wires = No Wire Total: **-\$420.00**

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	Ext Sell
Atrium	1	Linn : 5101 Personal		Bulk	Home	3 ft	Linn : K10 Cable	<input type="checkbox"/>	<input type="checkbox"/>	\$5.00	\$15.00
Atrium	-1	Linn : 5101 Personal		Bulk	Home	-120 ft	Linn : K10 Cable	<input type="checkbox"/>	1 T T	\$5.00	-\$600.00
Atrium	1	Linn : 5101 Personal		Bulk	Home	120 ft	Monster : 16/2 Spkr Wire	<input type="checkbox"/>	1 T T	\$0.45	\$54.00
Atrium	1	Linn : 5101 Personal		Bulk	Home	120 ft	Monster : 16/2 Spkr Wire	<input type="checkbox"/>	1 T T	\$0.45	\$54.00
Atrium	-1	Linn : 5101 Personal		Bulk	Room	-80 ft	Monster : 16/2 Spkr Wire	<input type="checkbox"/>	1 T T	\$0.45	-\$36.00
Atrium	-1	Linn : 5101 Personal		Bulk	Room	-60 ft	Monster : 16/2 Spkr Wire	<input type="checkbox"/>	1 T T	\$0.45	-\$27.00
Atrium	1	Linn : 5101 Personal		Bulk	Room	60 ft					
Atrium	-1	Linn : 5101 Personal		Bulk	Room	60 ft					
Atrium	1	Linn : 5101 Personal		Pre-Cut		3 ft					
Atrium	-1	Linn : 5101 Personal		Pre-Cut		-2 ft					

Change Wire Quantity

Enter the Quantity and click OK

OK

All Supplements Delete All Wire Restore Labor **Pending CO - Wire Supplements** Phantom = Adjust Bulk Wire - Home Runs Home

LeRoy Asher
Home Entertainment System
1294.1c1-1.100

Wire Detail 10000 Sq Ft
120 ft per Home Run Done

Wire Summary Adjust Bulk Wire - Room Runs Wire Manager

100 % Update

All Areas Wire Supplements Itemized Wires = No Wire Total: **-\$420.00**

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	Ext Sell
Atrium	1	Linn : 5101 Personal		Bulk	Home	3 ft	Linn : K10 Cable	<input type="checkbox"/>	1 T T	\$5.00	\$15.00
Atrium	-1	Linn : 5101 Personal		Bulk	Home	-120 ft	Linn : K10 Cable	<input type="checkbox"/>	1 T T	\$5.00	-\$600.00
Atrium	1	Linn : 5101 Personal		Bulk	Home	120 ft	Monster : 16/2 Spkr Wire	<input type="checkbox"/>	1 T T	\$0.45	\$54.00
Atrium	1	Linn : 5101 Personal		Bulk	Home	120 ft	Monster : 16/2 Spkr Wire	<input type="checkbox"/>	1 T T	\$0.45	\$54.00
Atrium	-1	Linn : 5101 Personal		Bulk	Room	-80 ft	Monster : 16/2 Spkr Wire	<input type="checkbox"/>	1 T T	\$0.45	-\$36.00
Atrium	-1	Linn : 5101 Personal		Bulk	Room	-60 ft	Monster : 16/2 Spkr Wire	<input type="checkbox"/>	1 T T	\$0.45	-\$27.00
Atrium	1	Linn : 5101 Personal		Bulk	Room	60 ft					
Atrium	-1	Linn : 5101 Personal		Bulk	Room	-60 ft					
Atrium	1	Linn : 5101 Personal		Pre-Cut		3 ft					
Atrium	-1	Linn : 5101 Personal		Pre-Cut		-2 ft					

Message

To change a negative Qty on Pending Change Orders, please go to the Areas screen and delete the Product and add a new one with the negative Qty you want.

OK

Delete All Parts = Phantom Product **Pending CO - Product Detail - Parts Supplements** 1 of 1 Reset Labor Home

LeRoy Asher
1294.1c1-1.100
Linn : 5101 Personal Handset
Audio : Multi-room : Keypad

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

Proposal Detail Prev Next

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

Parts Make **Model** **Add**
 for **Each Product**

Only products classified as "Parts" can be added

Qty	Unit	Make	Model	Description	Phz	Labor Time		Unit Cost	Unit Sell	Ext Sell	
						Unit h:m:s	Ext h:m:s				
1	ea	Linn	Aktiv Modules	Stereo or twin	1	0:15:00	0:15:00	153.00	255.00	255.00	
2	ea	Linn						387.00	645.00	1,290.00	
2	ea	Linn						180.00	300.00	600.00	
4	ea	Linn						125.00	210.00	840.00	
2	ea	Linn						12.00	20.00	40.00	

Change Part Quantity

Enter the Quantity and click OK

Delete All Parts = Phantom Product **Pending CO - Product Detail - Parts Supplements** 1 of 1 Reset Labor Home

LeRoy Asher
1294.1c1-1.100
Linn : 5101 Personal Handset
Audio : Multi-room : Keypad

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

Proposal Detail Prev Next

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

Parts Make **Model** **Add**
 for **Each Product**

Only products classified as "Parts" can be added

Qty	Unit	Make	Model	Description	Phz	Labor Time		Unit Cost	Unit Sell	Ext Sell	
						Unit h:m:s	Ext h:m:s				
-1	ea	Linn	Aktiv Modules	Stereo or twin	1	-0:15:00	0:15:00	153.00	255.00	-255.00	
-2	ea	Linn	Cirkus Kit	Main bearing	2	-0:15:00	0:30:00	387.00	645.00	-1,290.00	
-2	ea	Linn					0:30:00	180.00	300.00	-600.00	
-3	ea	Linn					0:45:00	125.00	210.00	-630.00	
-2	ea	Linn					0:30:00	12.00	20.00	-40.00	

Message

To change a negative Qty on Pending Change Orders, please go to the Areas screen and delete the Product and add a new one with the negative Qty you want.

Enhancement: POS/Quotation List: Show Quote Title in List

The Quotation Title is now displayed in the POS Quotation List screen and the Title header will sort Quotes by Title.

Find Quote		POS - Quotation List																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
Quotation Archive	Sold Quotes	Click on Quotation to view 17 Quotations																				Done				
View	Invoice	Client	Company	Specialist	Date	Amount Sold	Archive	Title																		
QT #7195	Christenson, Cecilia	Wade Realty	Jim Engandela	4/25/2007	1,675.25	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Aud																	
QT #7190	Pryde, Laura & Robbie		Robert	9/29/2005	14,823.63	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																		

Enhancement: POS/PO List: Find PO by Reference 1 and 2 fields

You can now Find POS Purchase Orders by Reference 1 and Reference 2 field

POS - Find Purchase Order		Done
Enter all of your desired Find criteria and then click Done		
Invoice	<input type="text" value="PO #7196"/>	
Client	<input type="text" value="Klipsch, Paul"/>	
Company	<input type="text" value="Klipsch Audio Technologies"/>	
Date	<input type="text" value="4/25/2007"/>	
Specialst	<input type="text" value="Jim Engandela"/>	
Invoice Amount	<input type="text"/>	
P.O. Status	<input type="text" value="Closed"/>	
P.O. Buyer	<input type="text" value="Joe Buyer"/>	
Project Number	<input type="text"/>	
PO Reference 1	Reference <input type="text" value="Marquee"/>	
PO Reference 2	Reference 2 <input type="text" value="Stenny Homes"/>	

Enhancement: POS Purchase Order Module - User Access Rights

You can now restrict users from accessing the POS Purchase Order module. After upgrading please go into the Master Prefs/Users/Access Rights and give or deny users access to the POS Purchase Order module.

Check All		UnCheck All		User Access Rights		Sort Users		Prev/Next		Home	
User Assignable Favorites <input type="checkbox"/> Empty = "Global" Fav's		No "Add Product" Prompt <input type="checkbox"/>		Jim Engandela President Checked boxes have Access Rights Unchecked boxes do not have Rights		PC Screen Size Computer Screen		Done		Commissions	
Module/Screen Access		Access Level		Projects		Screen Magnification 100%					
<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		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 <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/> Duplicate		Point of Sale <input checked="" type="checkbox"/> Delete/Archive Invoices <input checked="" type="checkbox"/> Invoice Product Sell Price <input checked="" type="checkbox"/> Purchase Order Access							

Point of Sale - View POS

Utilities ? Home

EME audio & video

User: Jim Engandela

Location: 1 - EME Audio & Video Systems

Add a New POS

Leave

View POS Invoices

Quotation

Sales Inv

Message

Your Access Rights do not permit you to Enter the PO module.

OK

Change Orders

Purchase Orders

Credit Memo's

Product Return Authorization

View Project Service Tickets

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

Enhancement: Contacts: Contact First & Last Names only labels

If a Contact only has a First Name and no Last Name, a (FN) indicator is added to the display.

If a Contact only has a Last Name and no First Name, a (LN) indicator is added to the display.

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		 135 of 135 Contacts																				Leave			
Vendors	Locations	New Contact																						Print Menu			
Contractor																											
Add POS or Proposal	Add Task	Entities	View	Fav Name	Company	Category	Fav Phone	Info Fav																			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Asher, LeRoy		Client	(H) 715-985-3833	<input type="checkbox"/>	<input type="checkbox"/>																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Back, Eileen		Client	(H) 608-989-2387	<input type="checkbox"/>	<input type="checkbox"/>																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bashir, Sikandar		Client	(M) 612-817-2242	<input type="checkbox"/>	<input type="checkbox"/>																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bentel, Tom	Direct TV	Vendor	(H) 245-376-9876	<input type="checkbox"/>	<input type="checkbox"/>																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Berger, Talli		Client	(H) 715-695-3613	<input type="checkbox"/>	<input type="checkbox"/>																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Berkow, Dana		Client	(H) 650-591-2996	<input type="checkbox"/>	<input type="checkbox"/>																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Brain, Cyrissa		Client	(H) 608-989-2443	<input type="checkbox"/>	<input type="checkbox"/>																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Burkes, Tom & Kelly & Family	Suph Business Brokers	Client	(W) 831-624-5600	<input type="checkbox"/>	<input type="checkbox"/>																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Callahan, Hayes		Client	(W) 715-287-4592	<input type="checkbox"/>	<input type="checkbox"/>																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Campbell, Mike		Client	(M) 262-853-7418	<input type="checkbox"/>	<input type="checkbox"/>																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mary (FN)		Client	(H) 715-877-2648	<input type="checkbox"/>	<input type="checkbox"/>																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Casper, Jim		Client	(W) 715-876-2331	<input type="checkbox"/>	<input type="checkbox"/>																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Caves, Greg	Runco International	Vendor	(H) 510 324-7777	<input type="checkbox"/>	<input type="checkbox"/>																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Christenson (LN)		Client	(H) 808-261-1074	<input type="checkbox"/>	<input type="checkbox"/>																		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Christenson, Cecilia	Wade Realty	Client	(H) 808 262 2614	<input type="checkbox"/>	<input type="checkbox"/>																		

Enhancement: Product Library/Utilities: Clear Product Favorite Flags

You can now clear All of the Favorite Flags or only the A, B or C flags in your Product Library. Your Products will stay intact.

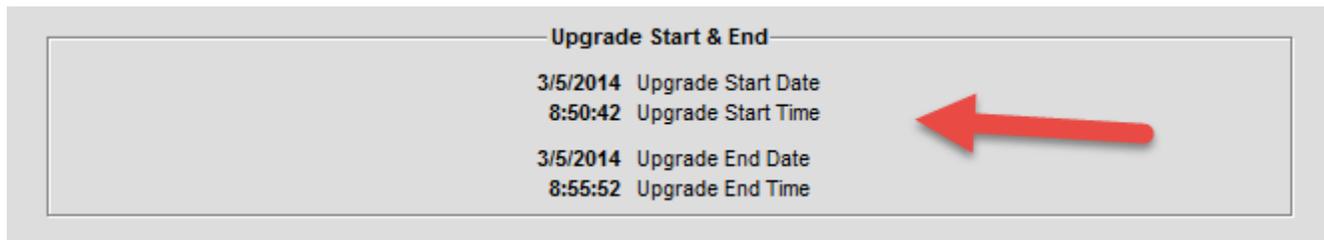
Find Products		Fav A		B	C	Product Library - Line List																				Utilities	Home
All	A	B	C	D	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z		
Show Products	Hidden Products	De List		 451 Items 451 Total																				Leave			
Part	Phantom	Recent Products																						Product Sets			
Bulk	PreCut	Discontinued Products																						Print Menu			
Displin	Cat	Type	Class	View	Make	Model : SKU	Description	Finish	Sell Price	Cue	Auto Tag																
Audio	Multi	Switcher	<input type="checkbox"/>	<input type="checkbox"/>	Crestron	AADS	Adagio Audio	Black	2,500.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>															
Audio	Multi	Switcher	<input type="checkbox"/>	<input type="checkbox"/>	Crestron	AADS-XM	Adagio Audio	Black	2,900.00 ea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>															
Audio	Multi	Switcher	<input type="checkbox"/>	<input type="checkbox"/>	Crestron	AAE	Adagio Audio	Black	1,800.00 ea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>															
Autom	Contr	Keypad	<input type="checkbox"/>	<input type="checkbox"/>	Crestron	C2N-DB12_	Decorator Keypad 12	Specify	260.00 ea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>															
Autom	Contr	Keypad	<input type="checkbox"/>	<input type="checkbox"/>	Crestron	C2N-DB6_	Decorator Keypad 6	Specify	260.00 ea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>															
Autom	Contr	Keypad	<input type="checkbox"/>	<input type="checkbox"/>	Crestron	C2N-DB8_	Decorator Keypad 8	Specify	260.00 ea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>															
Audio	Ampli	Multi-channel	<input type="checkbox"/>	<input type="checkbox"/>	Crestron	CNAMPX-12X60	12 Channel Multi-Room Black		2,800.00 ea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>															
Audio	Ampli	Multi-channel	<input type="checkbox"/>	<input type="checkbox"/>	Crestron	CNAMPX-16X60	16 Channel Multi-Room Black		3,900.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>															
Audio	Ampli	Multi-channel	<input type="checkbox"/>	<input type="checkbox"/>	Crestron	CNAMPX-2X60	2 Channel Amplifier	Black	1,000.00 ea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>															

Go to the Utility screen in the Product Library/Utility/Clear-Delete screen to run this Utility.



Enhancement: Upgrade Date & Time Indicator

The Start Date & Time and End Date & Time is now stored in the Upgrade Utility module to indicate when the last SCPS upgrade was done and how long it took to complete the Upgrade process.



Fix: Preferences/POS: POS Prefs Settings for Taxing Labor

New POS Quotation and Invoices now accurately reflect the current Master POS Preferences for Taxing Labor

POS Hourly Labor Rate		Show SKU in Product Listing	POS Payment Terms		
Sell	Cost				
<input type="text" value="\$90"/>	<input type="text" value="\$40"/>	<input type="text" value="No"/>	<input type="text" value="Standard Payment Terms"/>		
POS Invoice Tax			POS Invoice Tax Labels		
Equipment	Labor	Labor Tax Rate	Show AB Tax	A Tax Label	B Tax Label
<input type="text" value="Yes"/>	<input type="text" value="No"/>	<input type="text" value="A"/>	<input type="text" value="Show"/>	<input type="text"/>	<input type="text"/>

Fix: Proposal/Product Detail/Wire & Wire Supplements: Changing Home-Room

When changing Bulk Wire settings from Home to Room or Room to Home the Labor associated with that wire is now properly recalculated.

The error message "recxAdfustLabor.byWireQty [wireSupp2] old" has been removed.

This Fix has been done on both the Proposal/Product Detail/Wire screen and the Proposal/Wire Supplement screen.

The screenshot displays a software interface for 'Proposal - Wire Supplements' for 'LeRoy Asher'. The main window shows a table of 'Wire Supplements' with columns: Zone - Area, Qty, Make, Model, Bulk Run Type, Total Wire Qty, Wire & Cable Make, No Labor, Tax, Unit Sell, and Ext Sell. A red arrow points to the 'Bulk Run Type' column. A 'Message' dialog box is overlaid on the table, asking: 'Do you want to reset this Wire to the default Home Run or Room Run length?'. The dialog has three buttons: 'Cancel', 'Room', and 'Home'. A red arrow points to the 'Home' button. The background table shows the following data:

Zone - Area	Qty	Make	Model	Bulk Run Type	Total Wire Qty	Wire & Cable Make	No Labor	Tax	Unit Sell	Ext Sell	
Atrium	1	Linn	5101 Personal	Bulk	Home	120 ft	Linn : K10 Cable	1	T T	\$5.00	\$600.00
Atrium	1	Linn	5101 Personal	Bulk	Room	60 ft	Monster : 16/2 Spkr Wire	1	T T	\$0.45	\$27.00
Atrium	1	Linn	5101 Personal	Bulk	Room	60 ft	Monster : 16/2 Spkr Wire	1	T T	\$0.45	\$27.00
Atrium	1	Linn	5101 Personal	Bulk	Room	60 ft	Monster : MVQUAD-B DB	1	T T	\$1.80	\$108.00
Atrium	1	Linn	5101 Personal	Pre-Cut		2 pr	Linn : Black Interconnect	3	T T	\$120.00	\$240.00

Areas	Text	Products	LeRoy Asher 1294.1-1.100				<u>Degree of Difficulty</u>	Proposal Detail
Labor	Parts	Wire	Linn : 5101 Personal Handset Audio : Multi-room : Keypad				1 - Prewire 0%	◀ Prev Next ▶
						2 - Trim 0%		
						3 - Final 0%		

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

Wire Make Model Add
Wire & Cable for Product Qty 1 ea
Wire & Cable are not Itemized
10,000 Sq Ft Building Size
120 Default Home Run Wire Qty

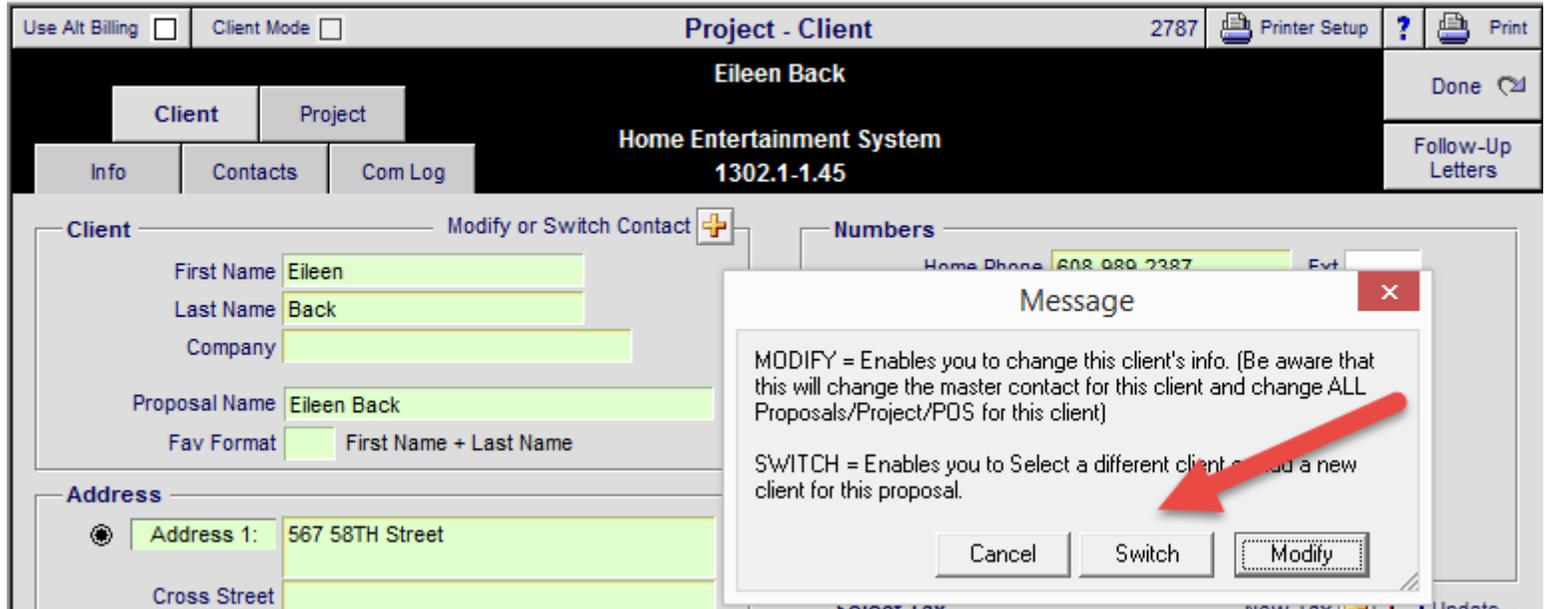
Only products classified "Wire" can be added
Labor Time No DOD

Class	Bulk Run Type	Qty	Unit	Wire Make	Model/Description	Install Phase	No Labor	Unit h:m:s	Ext h:m:s	Unit Cost	Unit Sell	Ext Sell	
Bulk	Room	60	ft	Linn	K10 Cable	1	<input type="checkbox"/>	0:00:30	0:30:00	3.00	5.00	300.00	<input type="checkbox"/>
Bulk	Home	120	ft	Monster	16/2 Spkr Wire	1	<input type="checkbox"/>	0:00:30	1:00:00	0.15	0.45	54.00	<input type="checkbox"/>
Bulk	Room	60	ft	Monster	16/2 Spkr Wire	1	<input type="checkbox"/>	0:00:30	0:30:00	0.15	0.45	27.00	<input type="checkbox"/>
Bulk	Room	60	ft	Monster	MVQUAD-B DB EZ500	1	<input type="checkbox"/>	0:00:30	0:30:00	0.60	1.80	108.00	<input type="checkbox"/>
Pre-Cut		2	pr	Linn	Black Interconnect	3	<input type="checkbox"/>	0:05:00	0:10:00	72.00	120.00	240.00	<input type="checkbox"/>

Wire Totals for Product Qty 1 ea												Wire Total: \$729.00			
Time Format = h:m:s															
Wire Type	Hourly Rate		Labor Time				Labor Cost				Labor Sell				
	Cost	Sell	Phz	Ext	+DOD	Total	Phz	Ext	+DOD	Total	Phz	Ext	+DOD	Total	
Wire Labor - Bulk	\$35.00	\$60.00	1	2:30:00	0%	2:30:00	1	\$87.50	0%	\$87.50	1	\$150.00	0%	\$150.00	
Default Unit Labor Time		0:00:30	2	0:00:00	0%	0:00:00	2		0%		2		0%		
			3	0:00:00	0%	0:00:00	3		0%		3		0%		
Bulk Wire - Total Time: 2:30:00						Cost Total: \$87.50				Bulk Total: \$150.00					
Wire Labor - Precut	\$40.00	\$60.00	1	0:00:00	0%	0:00:00	1		0%		1		0%		
Default Unit Labor Time		0:05:00	2	0:00:00	0%	0:00:00	2		0%		2		0%		
			3	0:10:00	0%	0:10:00	3	\$6.67	0%	\$6.67	3	\$10.00	0%	\$10.00	
Precut Wire - Total Time: 0:10:00						Cost Total: \$6.67				PreCut Total: \$10.00					
Wire Labor - Total Time: 2:40:00										Labor Total: \$160.00					
												Wire & Labor Total: \$889.00			

Fix: Project/Client: Switch Contact info on a Project

Users logged in as Administrator can now switch the Contact Information on a Project.



Fix: Contact/Entities: View POS Invoices screen size

When viewing a POS invoice from the Contact Entity screen, the POS Invoice screen now opens full size instead of minimized.

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

Fix: Product Library/Find Products: Advanced Search-Description entry

The Advanced Search option in the Find Products screen now properly finds only the Products you requested, when you enter a Product Description, instead of all of the Products in the Product Library.

Product Library - Find Products with more Criteria

Find
No Sell Price

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

Done Find

Make: ←

Model:

SKU: Finish:

Description:

Features:

Show All Products

Show New Products

Show Hidden Products

Show Omitted

Show without Make or Model

Show Discontinued Product

Product Library - Line List										AlphaFinder Show Makes		Home	
Product Library - Line List										AlphaFinder Show Makes		Home	
Product Library - Line List										AlphaFinder Show Makes		Home	
										18 Items 452 Total		<input type="checkbox"/> Show All Groups <input type="checkbox"/> Show Hidden	
Displin	Cat	Type	Class View	Make	Model	Description	Finish	Sell Price	Cue	Notes	Fav	Hid	Auto Tag
Audio	Multi	Switcher	<input checked="" type="radio"/>	Crestron	AADS	Adagio Audio	Black	2,500.00 ea	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Audio	Multi	Switcher	<input checked="" type="radio"/>	Crestron	AADS-XM	Adagio Audio	Black	2,900.00 ea	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Audio	Multi	Switcher	<input checked="" type="radio"/>	Crestron	AAE	Adagio Audio	Black	1,800.00 ea	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Autom	Contr	Keypad	<input checked="" type="radio"/>	Crestron	C2N-DB12_	Decorator Keypad 12	Specify	260.00 ea	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Autom	Contr	Keypad	<input checked="" type="radio"/>	Crestron	C2N-DB6_	Decorator Keypad 6	Specify	260.00 ea	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>