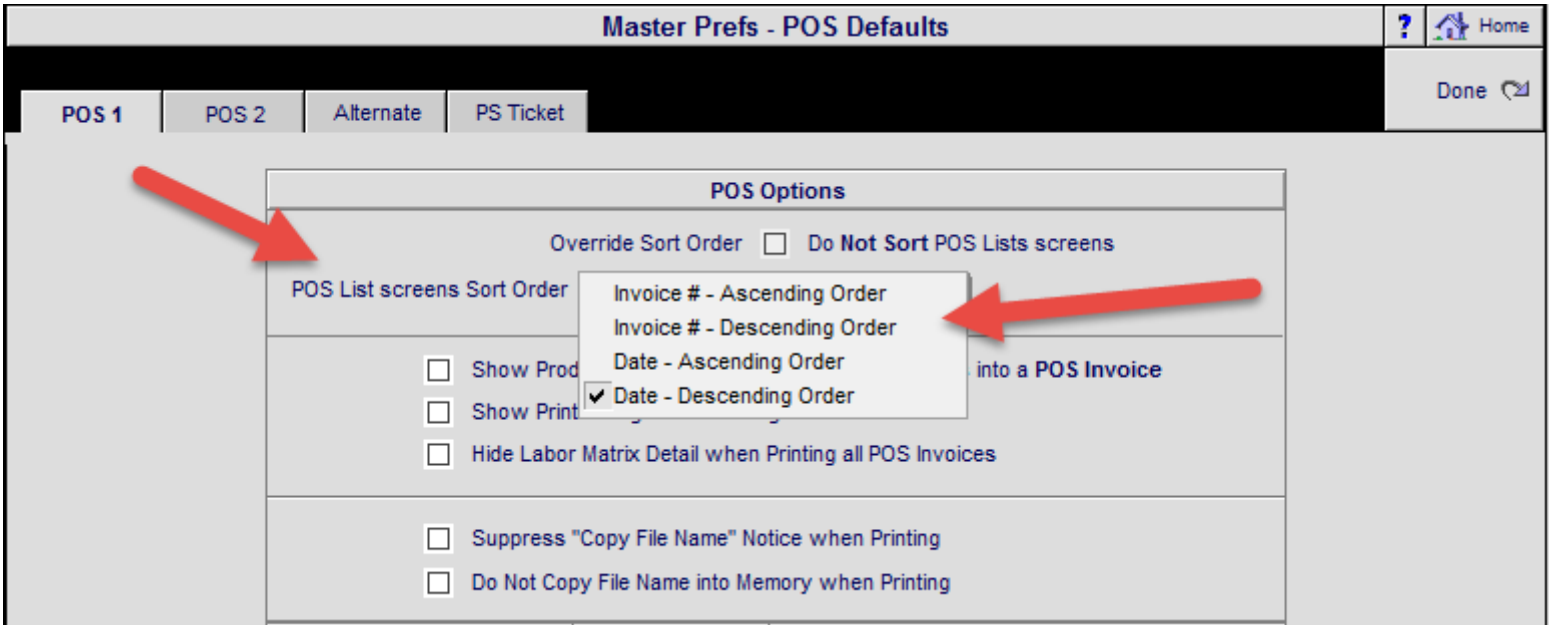
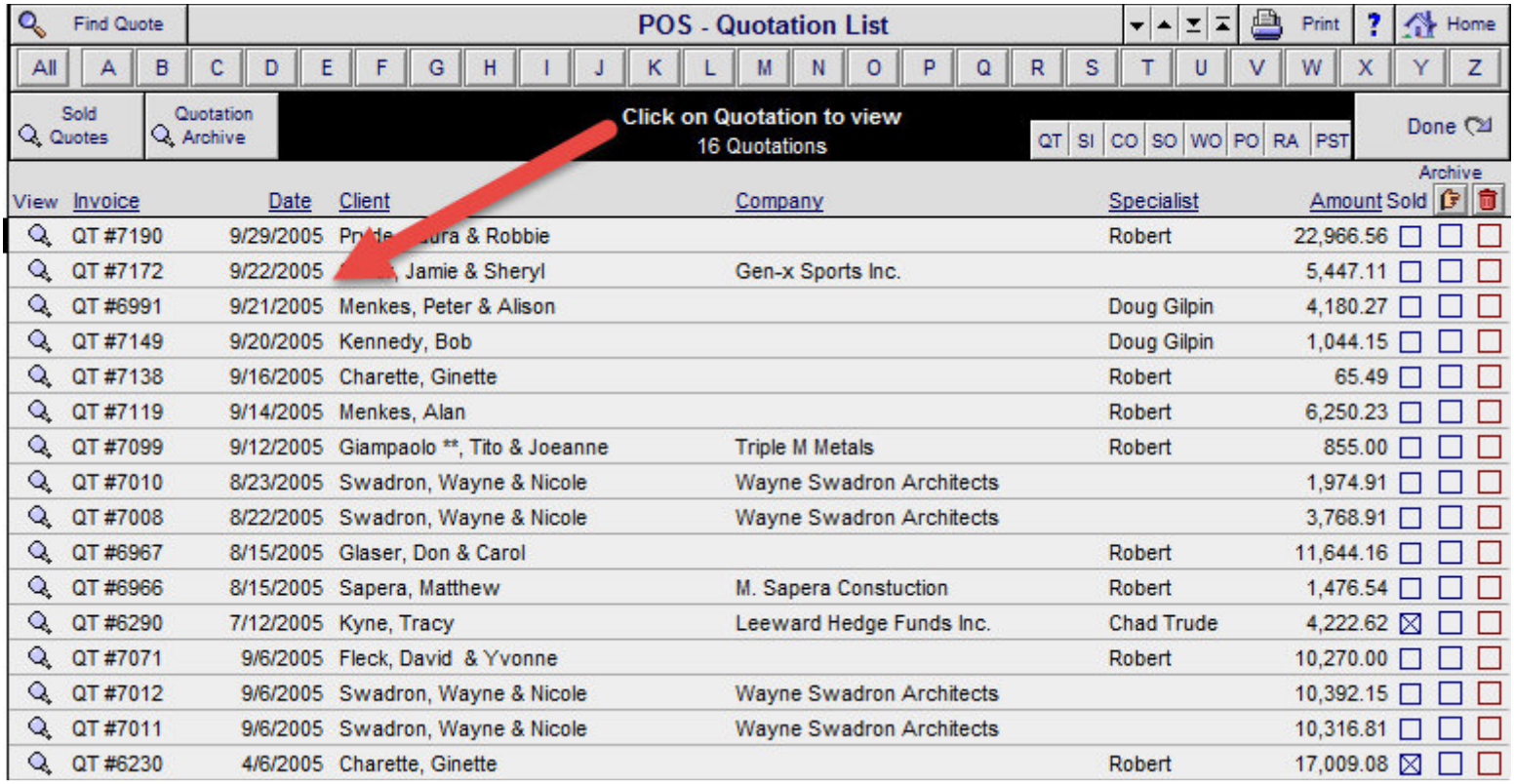
SCPS 12.1v1 Upgrade
New Features, Enhancements and Fixes
11-25-2015

Enhancement: Master Prefs/POS: 4 Sort Order Options

You can now choose how you would like all of the POS Invoice screens to Sort as a default.

1. Invoice # - Ascending Order
2. Invoice # - Descending Order
3. Date - Ascending Order
4. Date - Descending Order





Enhancement: Proposal: Automatic Contact Price Adjustment Feature

You can now set a Pricing Discount for a Contact, so that when you create a Proposal for that Contact the Discount will automatically be entered into the Proposal Pricing screen, Discount.

You will still need to apply that discount in the Proposal, by going into the Proposal/Pricing screen and updating the price.

Find Contacts | Replace Data | Contacts - Contact Detail | Print Contact | Printer Setup | ? | Home

Duplicate Contact | Delete Contact | Engandela, Jim | Print Menu | New Proposal | New POS | New Task | Done | Prev Next 1 of 132 | New Contact

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

Labels

Category: Vendor | Class | Key | ID | Fav
? Create Vendor and Assign Product Makes | Group | Status | Staff | Tickler | Tag

Company | Account ID | Web Address | Web

Fav Contact	Print Contact	Title	First Name	Last Name	Info	Email Address	Email
◉	◉		Jim	Engandela	President		
○	○						
○	○						
○	○						
○	○						
○	○						
○	○						
○	○						

Address 1

Fav ◉
Address 1:
Site Map | MapQuest Directions
City | State | Zip: | Country | County | Cross Street

Address 2

Fav ○
Address 2:
Site Map | MapQuest Directions | Copy Address
Cross Street | City | State | Zip: | Country | County

Insert Label Line | Off

Proposal & POS Entity Label
Jim Engandela
Jim Engandela

Contact Print Merge Label
Jim Engandela
Jim Engandela

Insert 2nd Contact Name | Insert 2nd Contact Name

Phone Numbers

Fav			ext	Country Code cc
◉	Home Phone	715-287-3335		
○	Work Phone			
○				
○				
○				
○	Mobile Phone	715-287-3335		
○				
◉	Fax 1			
○	Fax 2			

Favorite Phone (H) 715-287-3335
Favorite eMail

Date Stamp | **Global - Contact Notes** | Print Notes

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

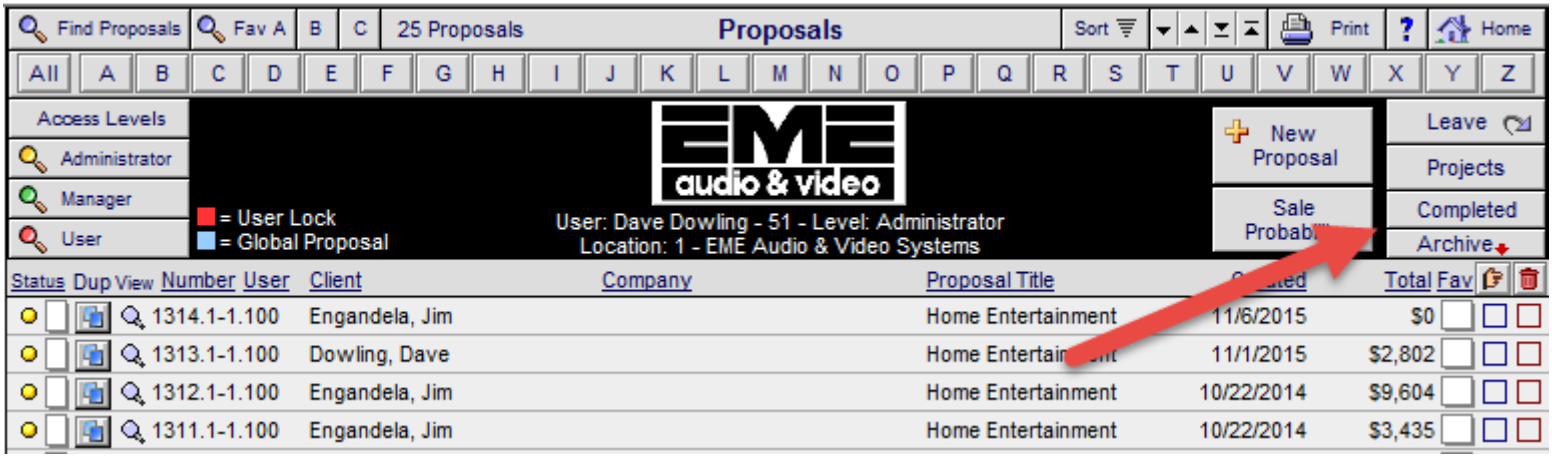
Contact - Proposal Price Adjustment

Adjustment Type: Adjust Sell Price
Percentage %: -14%

This Price Adjustment will be applied to Proposal for this Contact. You still will need to go into the Proposal Pricing screen and click: Set All Prices to Adjustment

Enhancement: Proposal List: Add Completed Button

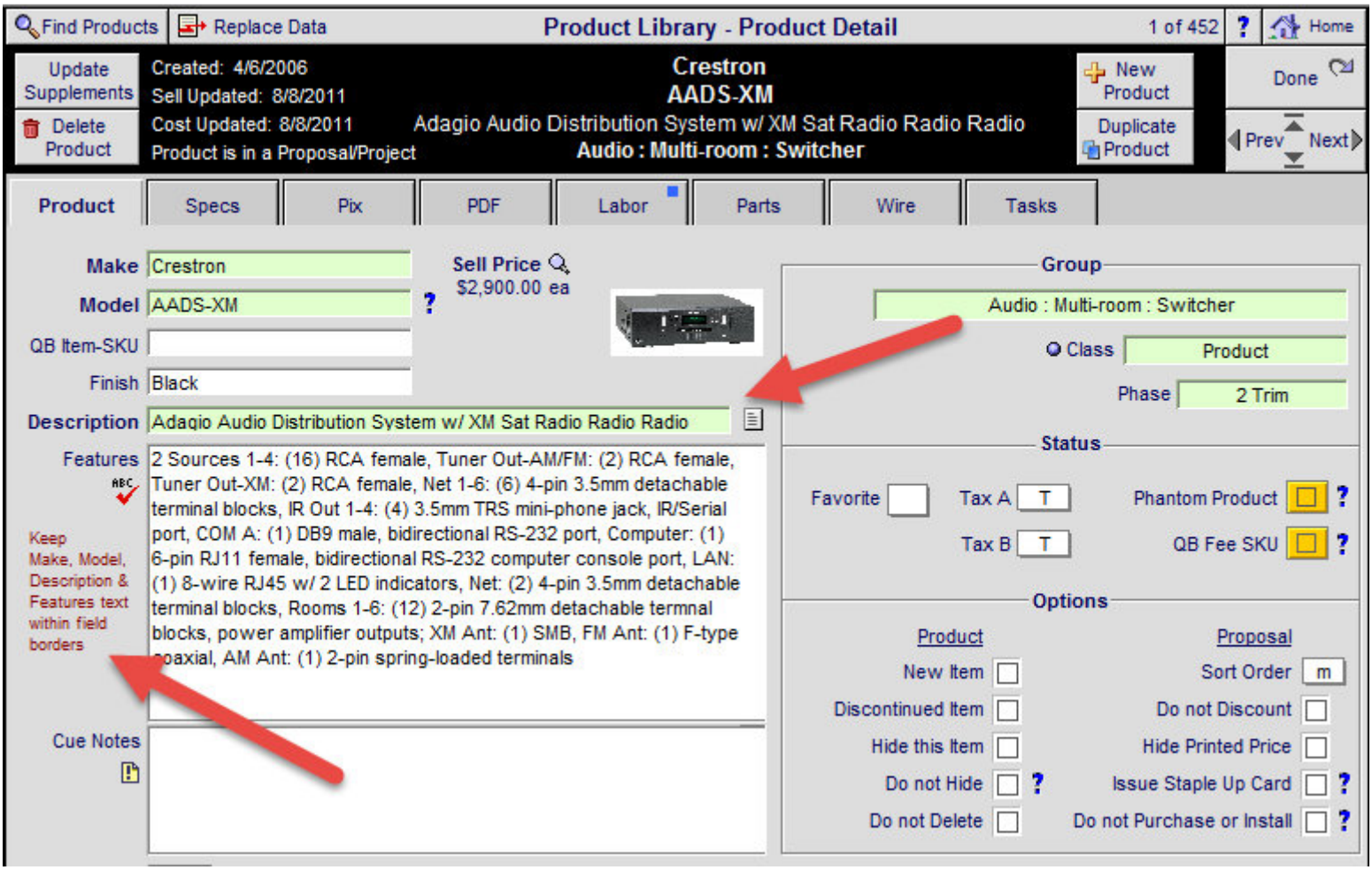
You can now access your Completed Projects directly from the Proposal list screen.



Enhancement: Proposal/Print Menu: All reports-Increase Product Description field size

The field size that holds Product Descriptions in Proposals has been increased.

You still need to try to stay within the field border in the Product Library/Product Detail screen, but the reports will now not be clipped off if you exceed the field size a bit.



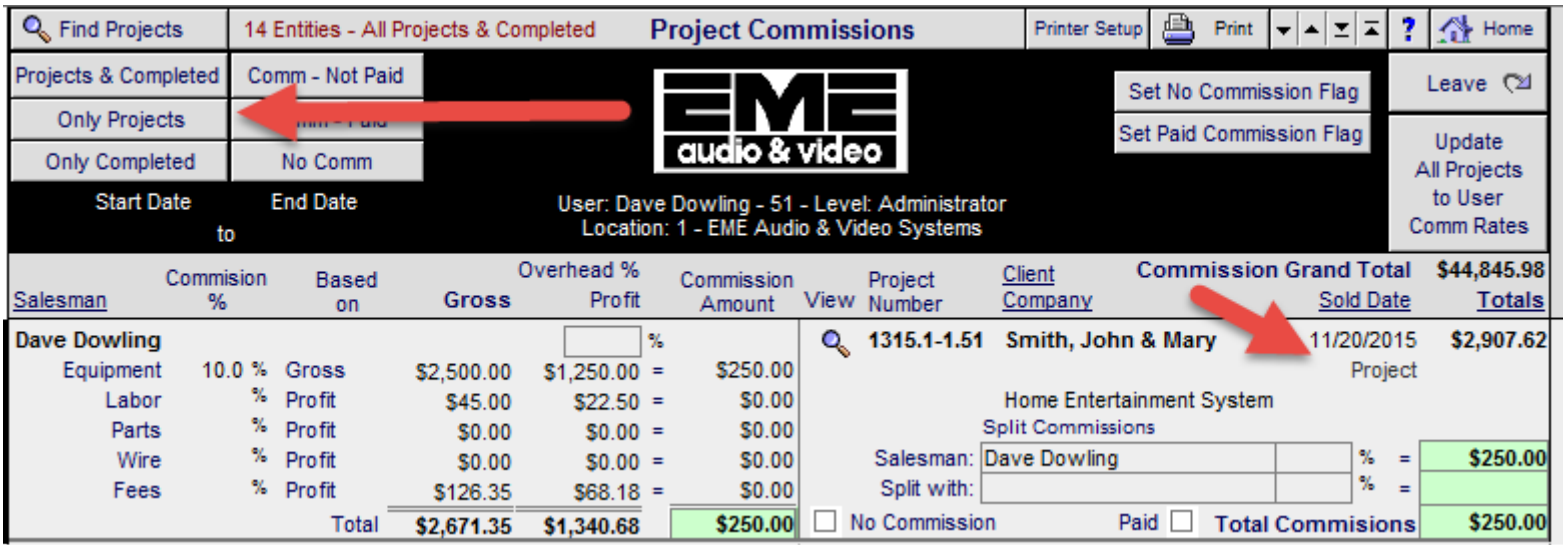
Zone 2 - Living Room

Home music systems require careful design and installation to achieve their maximum hi-fidelity potential. music is the communication of emotion. a great stereo must sound pleasant and be emotionally involving. to achieve this care must be taken in matching and tuning each component so that the whole system will perform in harmony with the music. frequency response, sound pressure levels, imagery, tonal balance and distortion are a few of the parameters that are taken into consideration and adjusted for maximum performance.

	Qty	Ext. Price
Audio		
Linn : Classik Movie Di : Integrated multi-channel DVD-CD player/tuner/preamp/power amplifiers : Black	1 ea	$3,395.75
Klipsch : RS-7 : Reference Surround Speaker : Matte Black	2 ea	$765.00
Klipsch : RC-35 : Center Channel Speaker : Black Ash	1 ea	$339.15
Klipsch : RF-35 : Reference Tower Speaker : Black Ash	2 ea	$848.30
Linn : Ninka : Floor-standing loudpeakers: pair : Black	1 pr	$1,572.50
Klipsch : RSW-10 : Reference Subwoofer : Black Ash	1 ea	$850.00
	Equipment	$7,770.70
	Installation	$925.00
	Misc. Parts	$95.00
	Wire & Cable	$2,271.75
	Zone 2 - Living Room	**$11,062.45**

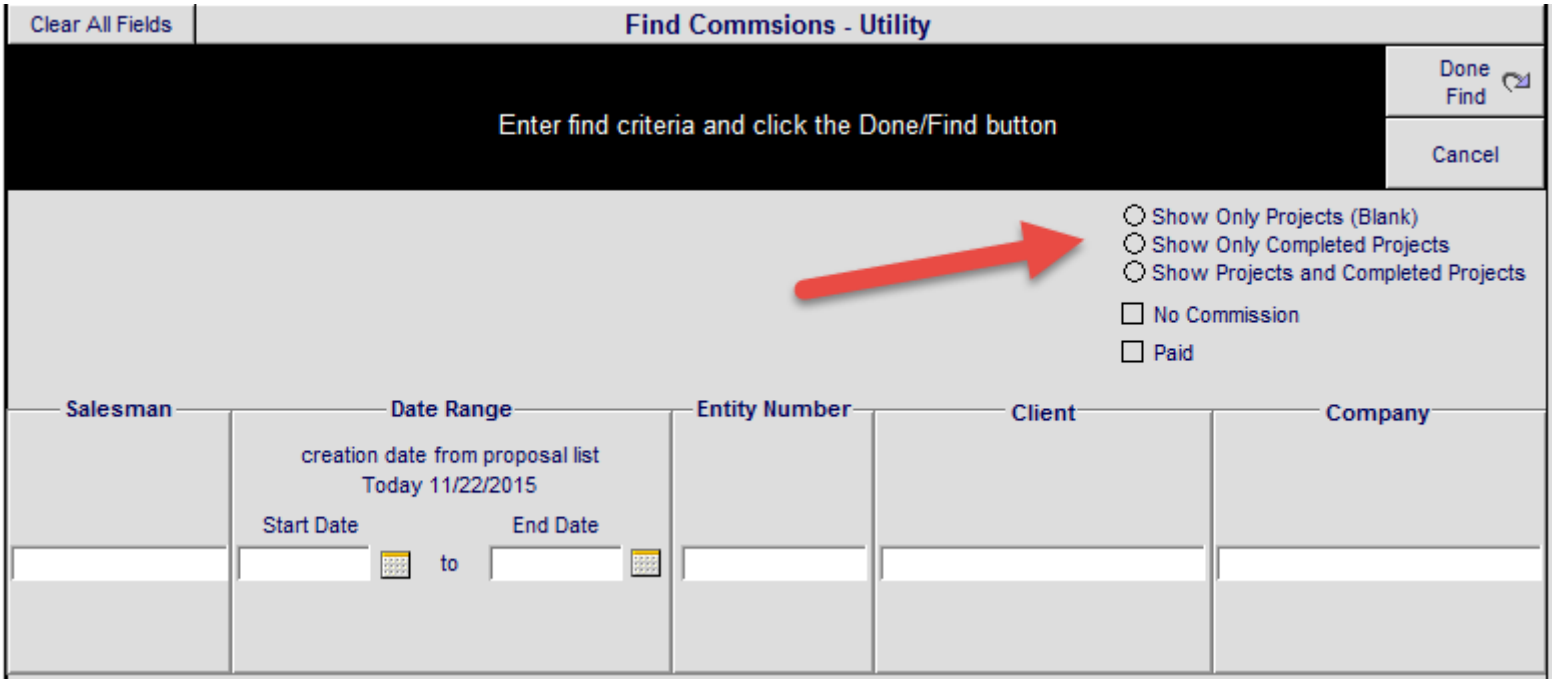
Enhancement: Project Manager/Commissions: Show Projects & Completed

You can now find Only Projects or Only Completed Projects in the Project Manager/Commissions screen and each entity displays it's status.



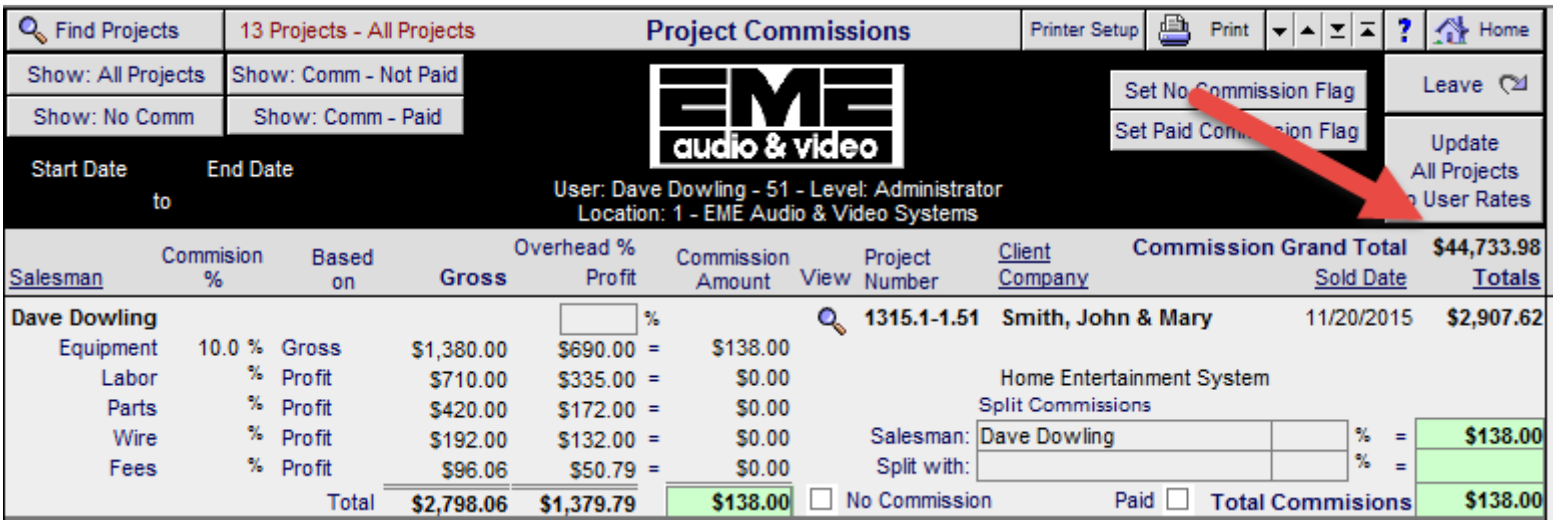
Enhancement: Project Manager/Commissions: Find Projects & Completed Option

The Find Projects screen now has an Option to Only Projects or Only Completed Projects.



Enhancement: Project Manager/Commissions: Show Grand Total on Screen & Report

The Total Commission amount is now displayed on the screen for all of the entities showing on the screen.



Start Date to End Date

EME Audio & Video Systems - Confidential Report

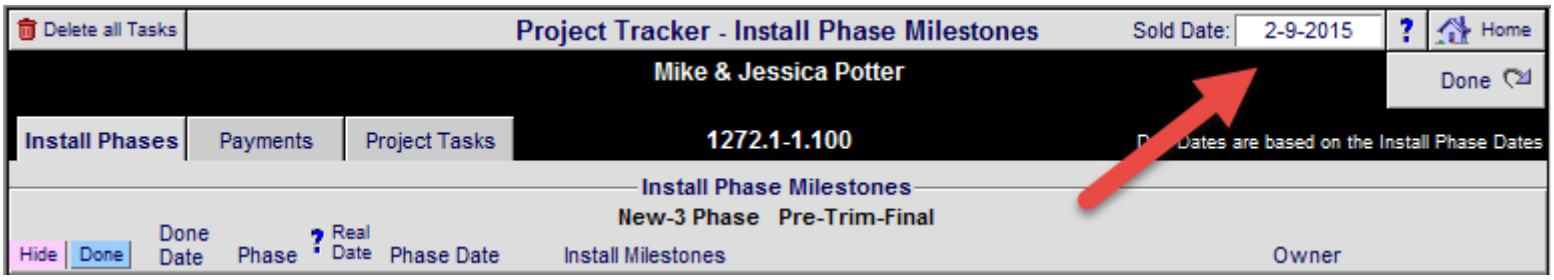
Sales Commissions

11/20/2015
Page 4

Salesman	Commision %	Based on	Gross	Profit		Commission Amount	View	Project Number	Client Company	Sold Date	Totals
Jim Engandela					%			**1288.1-1.10**		4/25/2007	**$6,959.39**
Equipment	10.0 %	Gross	$4,270.25	$1,606.75	=	$427.03					
Labor	10.0 %	Gross	$689.03	$311.75	=	$68.90			Home Entertainment System		
Parts	10.0 %	Gross	$210.00	$86.00	=	$21.00			Spit Commissions		
Wire	10.0 %	Gross	$1,059.40	$504.40	=	$105.94		Salesman:	Jim Engandela % =		**$667.91**
Fees	10.0 %	Gross	$450.42	$225.21	=	$45.04		Split with:	% =		
		Total	**$6,679.10**	**$2,734.11**		**$667.91**	☐ No Commission		Paid ☐	**Total Commisions**	**$667.91**
Jim Engandela					%			**1297.1-1.10**	**Asher, LeRoy**	6/30/2014	**$50,033.20**
Equipment	10.0 %	Gross	$3,900.00	$1,560.00	=	$390.00					
Labor	10.0 %	Gross	$7,750.00	$3,633.33	=	$775.00			Home Entertainment System		
Parts	10.0 %	Gross	$28,150.00	$11,290.00	=	$2,815.00			Spit Commissions		
Wire	10.0 %	Gross	$7,020.00	$3,240.00	=	$702.00		Salesman:	Jim Engandela % =		**$4,745.81**
Fees	10.0 %	Gross	$638.10	$326.85	=	$63.81		Split with:	% =		
		Total	**$47,458.10**	**$20,050.18**		**$4,745.81**	☐ No Commission		Paid ☐	**Total Commisions**	**$4,745.81**
Jim Engandela					%			**1298.1-1.10**	**Asher, LeRoy**	7/2/2014	**$40,906.38**
Equipment	10.0 %	Gross	$37,500.00	$18,750.00	=	$3,750.00					
Labor	10.0 %	Gross	$675.00	$337.50	=	$67.50			Home Entertainment System		
Parts	10.0 %	Gross	$0.00	$0.00	=	$0.00			Spit Commissions		
Wire	10.0 %	Gross	$0.00	$0.00	=	$0.00		Salesma	Jim Engandela % =		**$4,007.03**
Fees	10.0 %	Gross	$1,895.25	$1,022.63	=	$189.53		Split with:	% =		
		Total	**$40,070.25**	**$20,110.13**		**$4,007.03**	☐ No Commission		Paid ☐	**Total Commisions**	**$4,007.03**
Jim Engandela					%			**1303.1-1.10**	**Engande Jim**		**$139.98**
Equipment	10.0 %	Gross	$2,500.00	$1,250.00	=	$250.00					
Labor	10.0 %	Gross	$45.00	$22.50	=	$4.50			Home Entertainment System		
Parts	10.0 %	Gross	$0.00	$0.00	=	$0.00			Spit Commissions		
Wire	10.0 %	Gross	$0.00	$0.00	=	$0.00		Salesman:	Jim Engandela % =		**$267.14**
Fees	10.0 %	Gross	$126.35	$68.18	=	$12.64		Split with:	% =		
		Total	**$2,671.35**	**$1,340.68**		**$267.14**	☐ No Commission		Paid ☐	**Total Commisions**	**$267.14**
									Jim Engandela	**Total Commisions**	**$44,595.98**
										Grand Total Commisions	**$44,733.98**

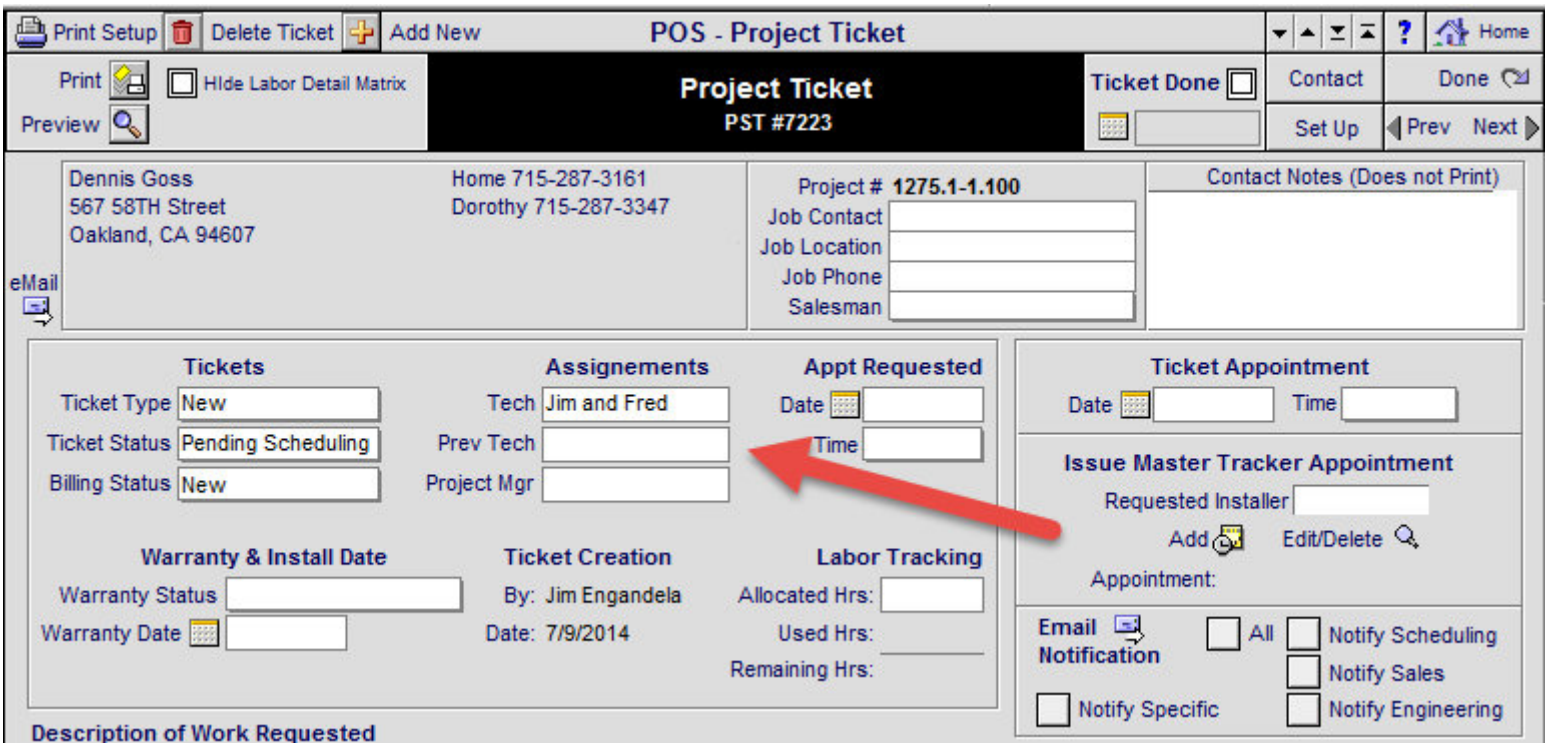
Enhancement: Project/Tracker: Add modifiable Sold Date field

The Sold Date of a Project can now be changed in the Project Tracker screen.



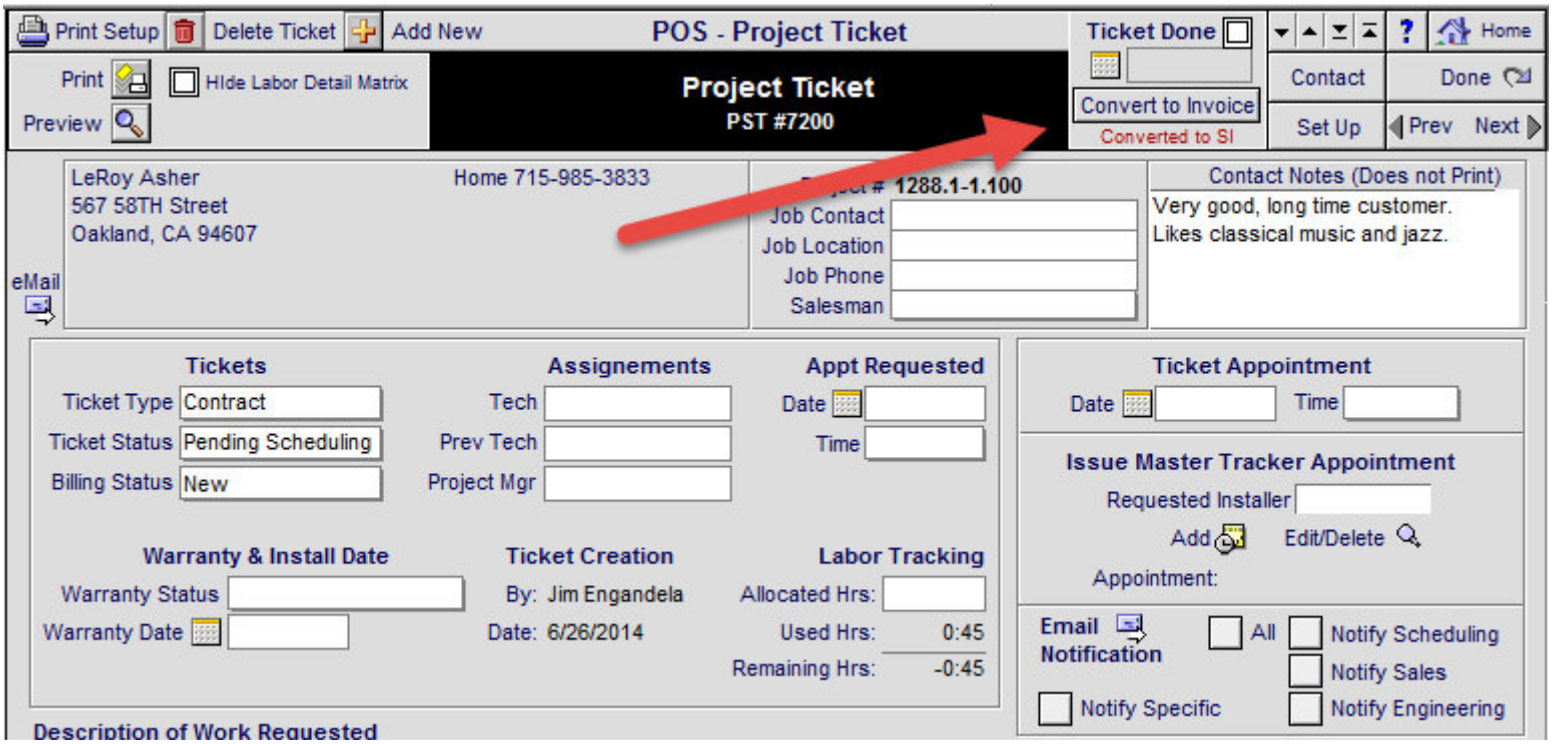
Enhancement: POS/Service Tickets: Enable manual field entry

You can now manually enter multiple Techs in these fields as well as select them from the pop up menu.

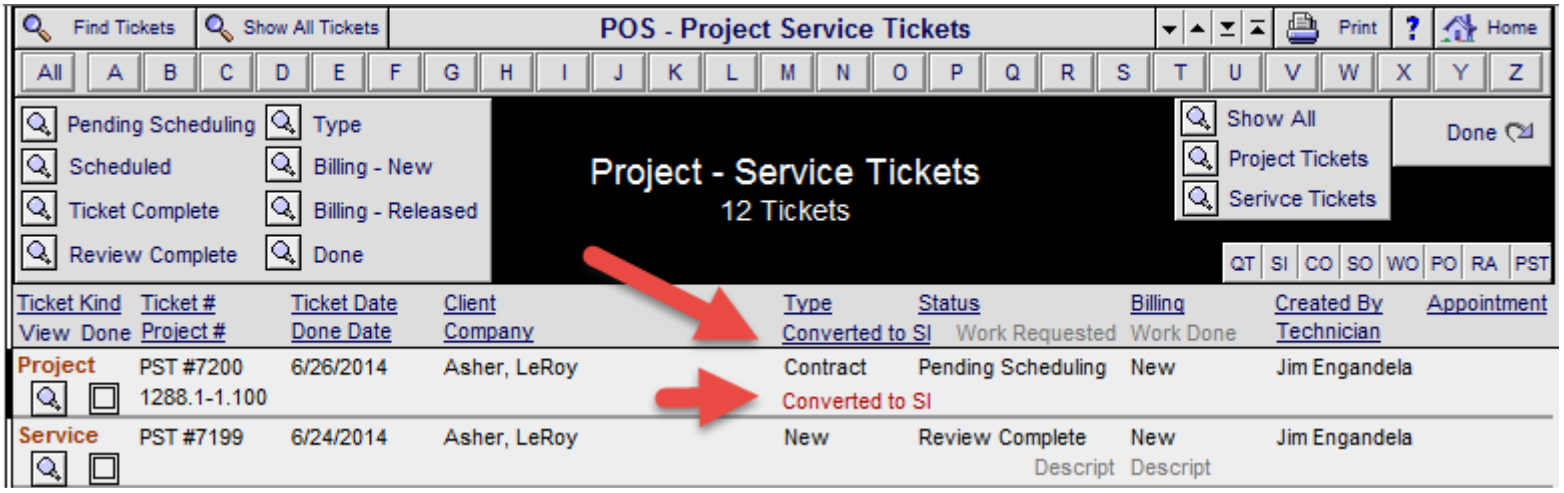


Enhancement: POS/Service Ticket: Convert to Sales Invoice

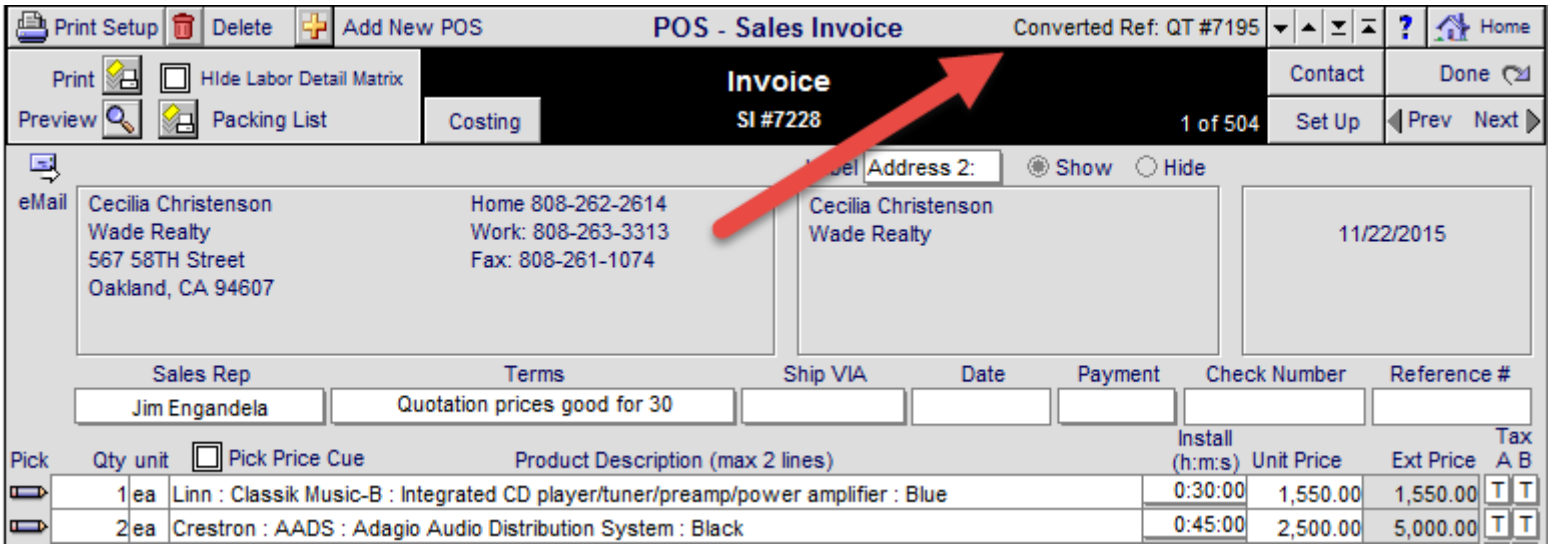
You can now Convert a Service Ticket directly into a Sales Invoice



PST List shows Tickets that have been Converted

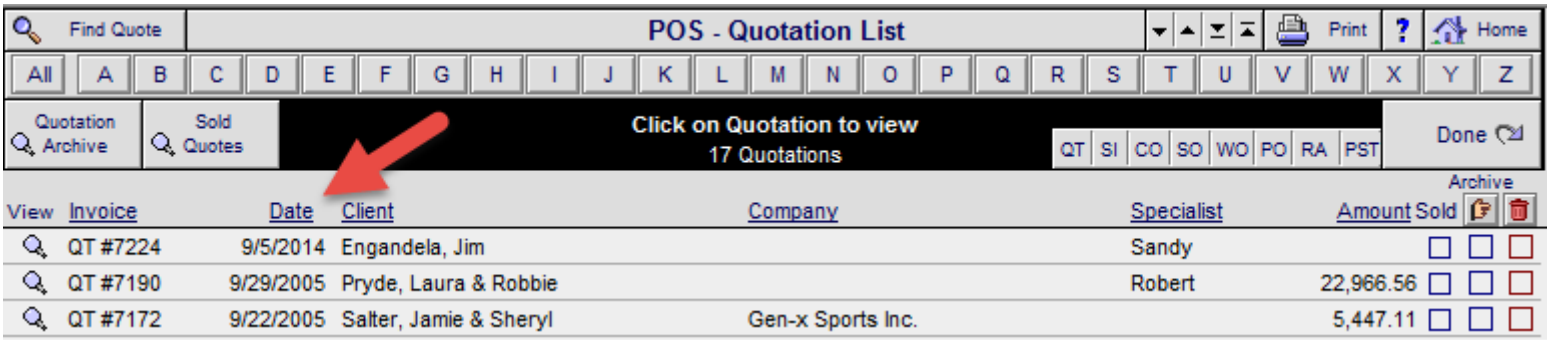


Sales Invoices show PST or Quotation Reference number



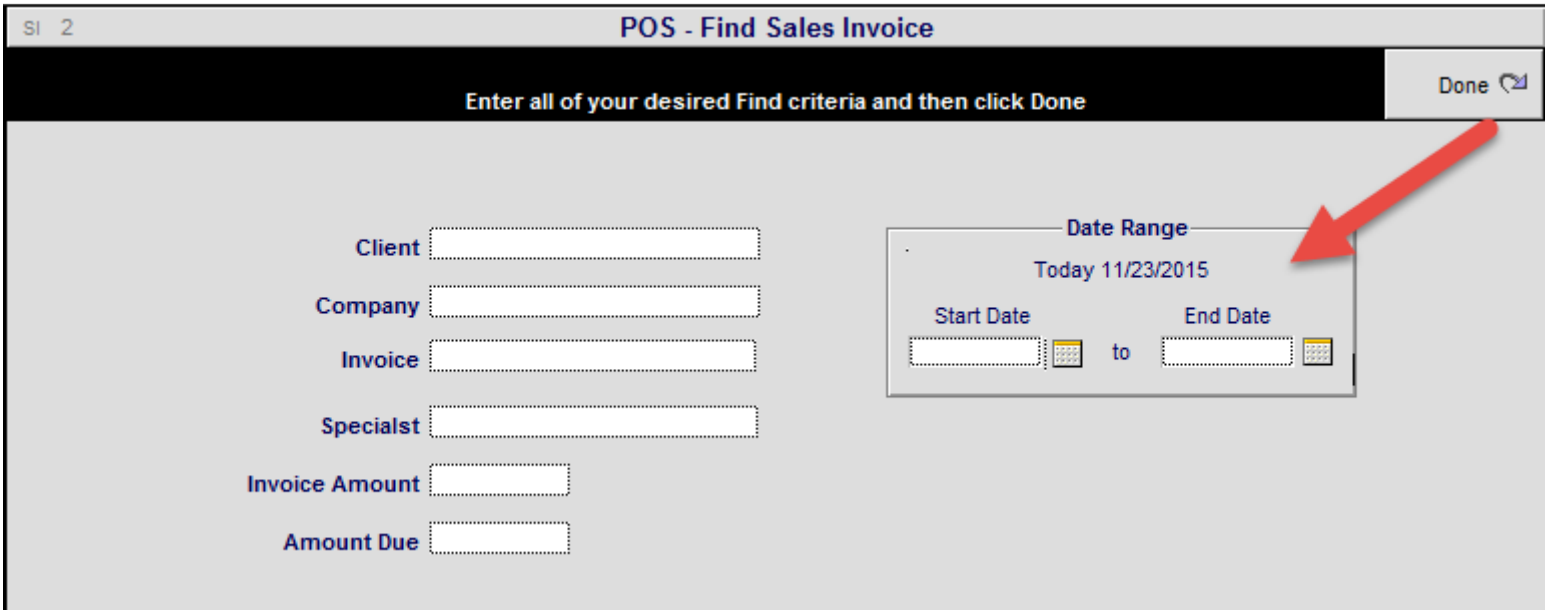
Enhancement: POS/All Invoice List screens: Rearrange columns to move Date

The POS Invoice Date has been moved next to the Invoice Number on all POS Invoice List screens



Enhancement: POS/All Invoices/Find: Date Range Option

All POS Invoice Find screens now have a Date Range option so that you can find POS Invoices by date or date range.



Enhancement: POS/PO's: Print PO List: Add PO Total Amount

The PO Total Amount has been added to the POS PO Invoice report

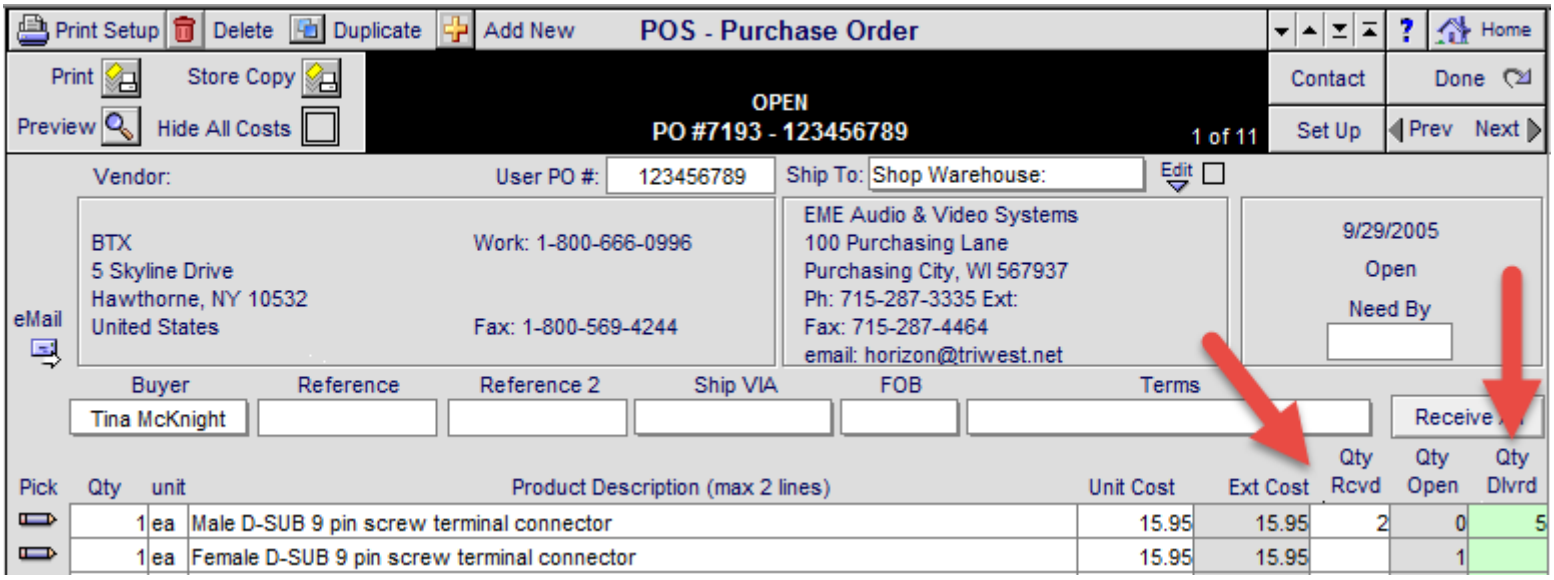
11/22/2015 POS INVOICE LIST 1

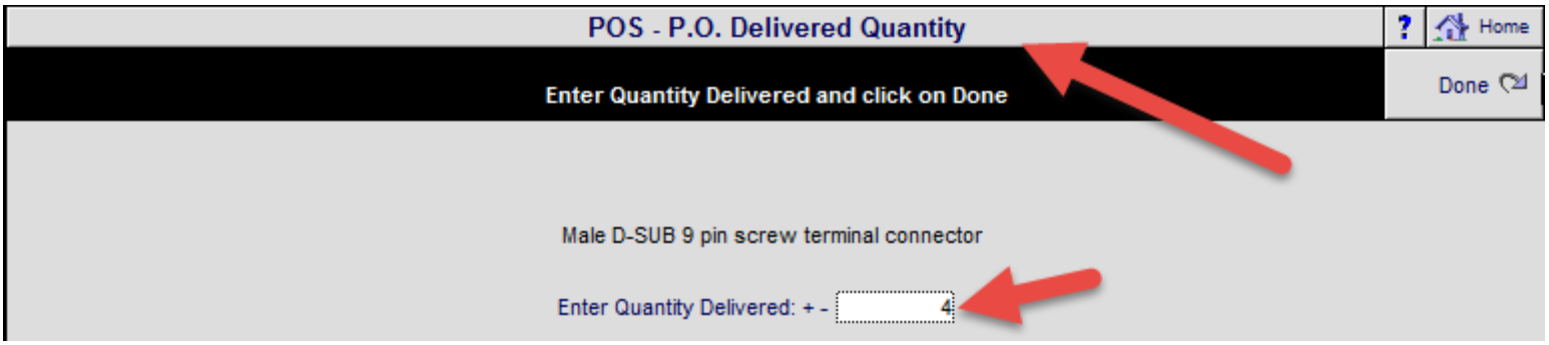
Date	Invoice	Company	Reference	PO Total
9/29/2005	PO #7193 - 123456789	BTX		31.90
9/28/2005	PO #7187	Precor	Lipson	336.00

Enhancement: POS/PO's: Quantity Received and Delivered

The POS PO Qty Received Incremental mechanism has been Increased from 25 Line Items to all 100 Line Items

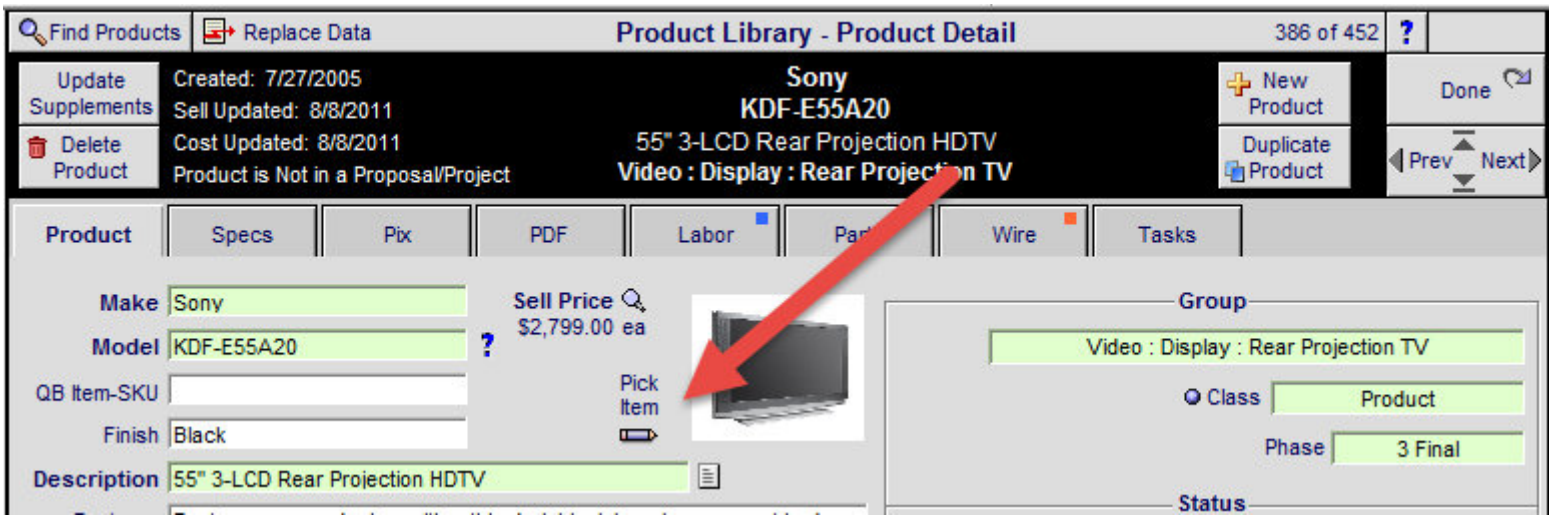
A POS PO Qty Delivered Incremental mechanism has been added to the PO screen.





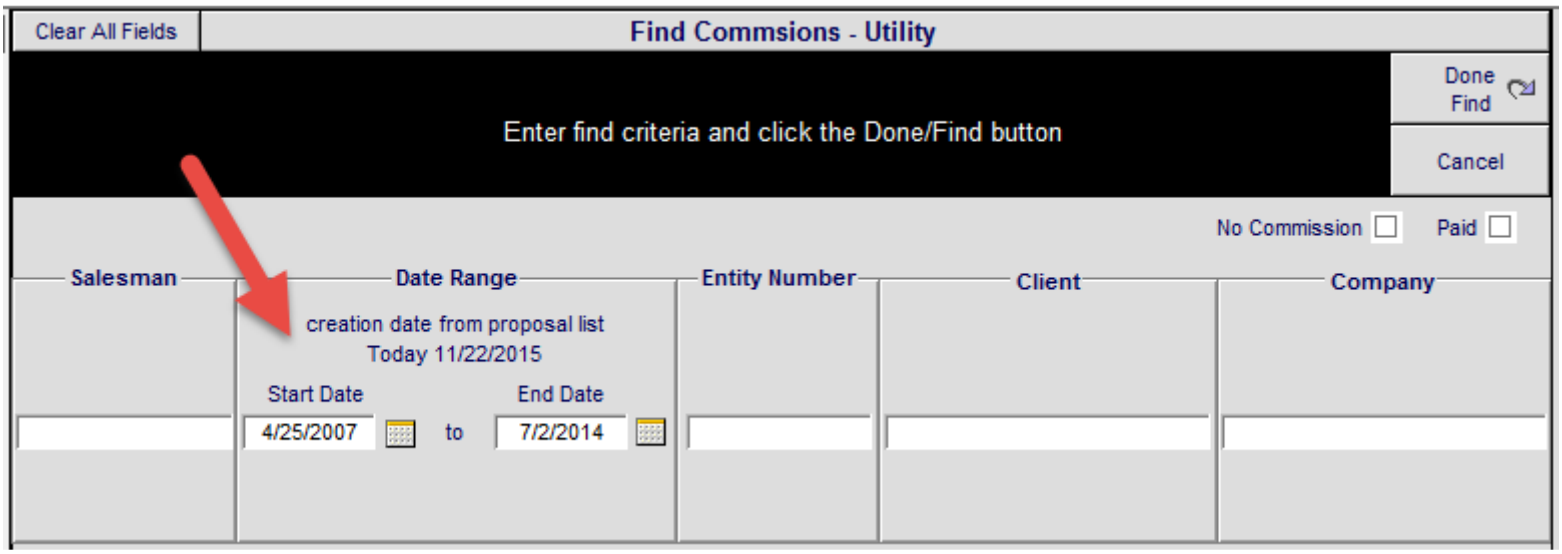
Fix: Proposal/Pick Product: Pick Product button

When Picking a Product from the POS module and going into the Product Detail screen, the Pick Item button now works properly and adds the product to the POS Invoice.



Fix: Project Manager/Commissions/Find: Fix Date Range Find

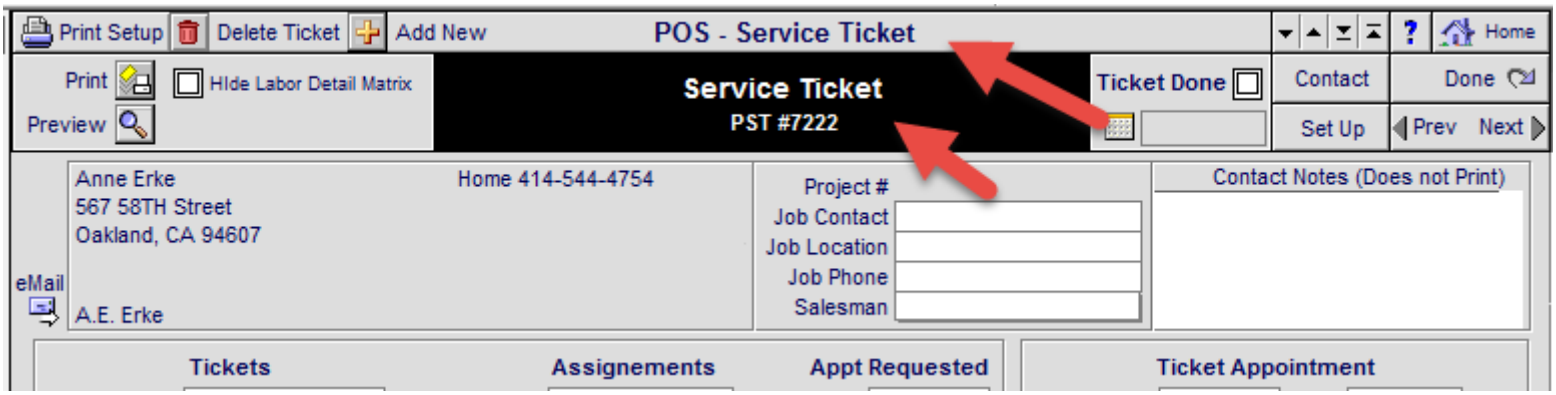
The Date Range Option now works properly in the Project Manager/Find Commission screen.

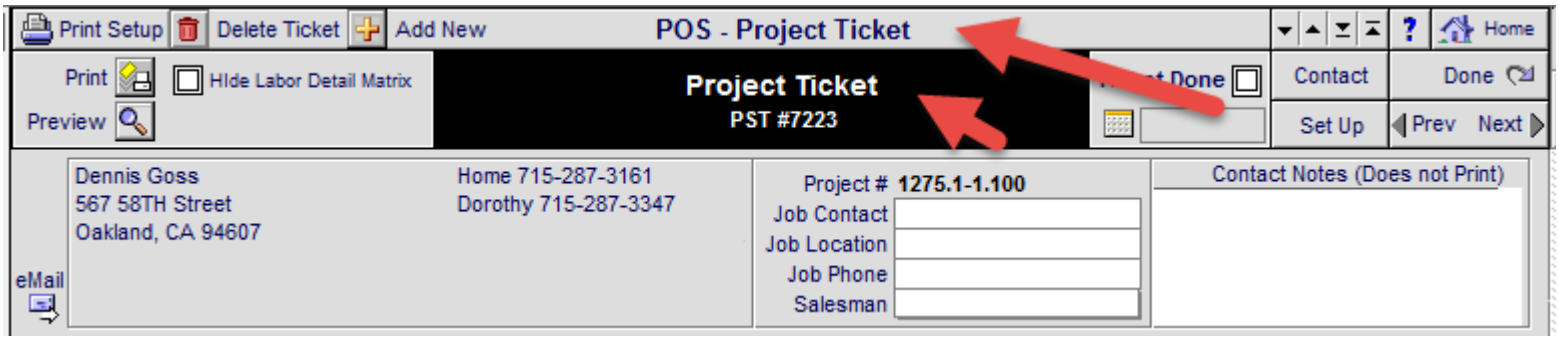


Fix: POS Project Service Ticket header

When creating a Ticket from the POS module the Ticket now shows "Service".

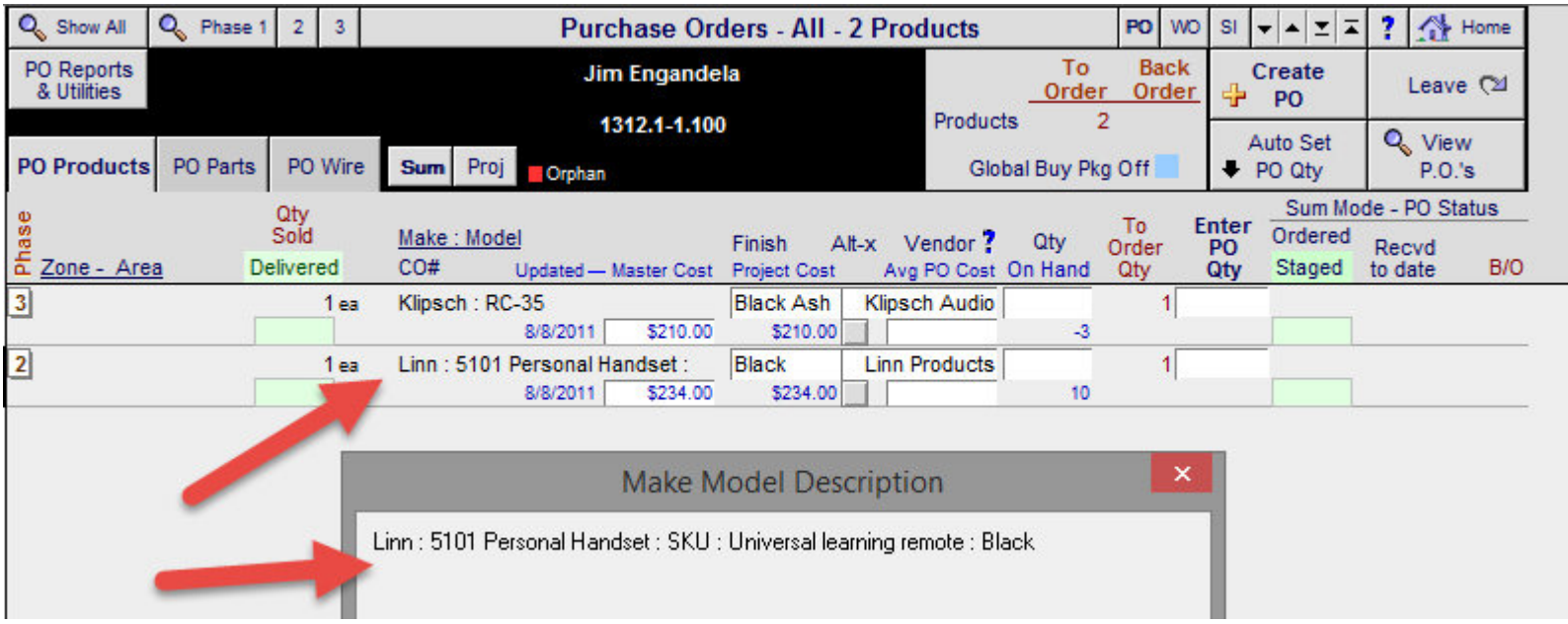
When creating a Ticket from the Project module the Ticket now shows "Project".

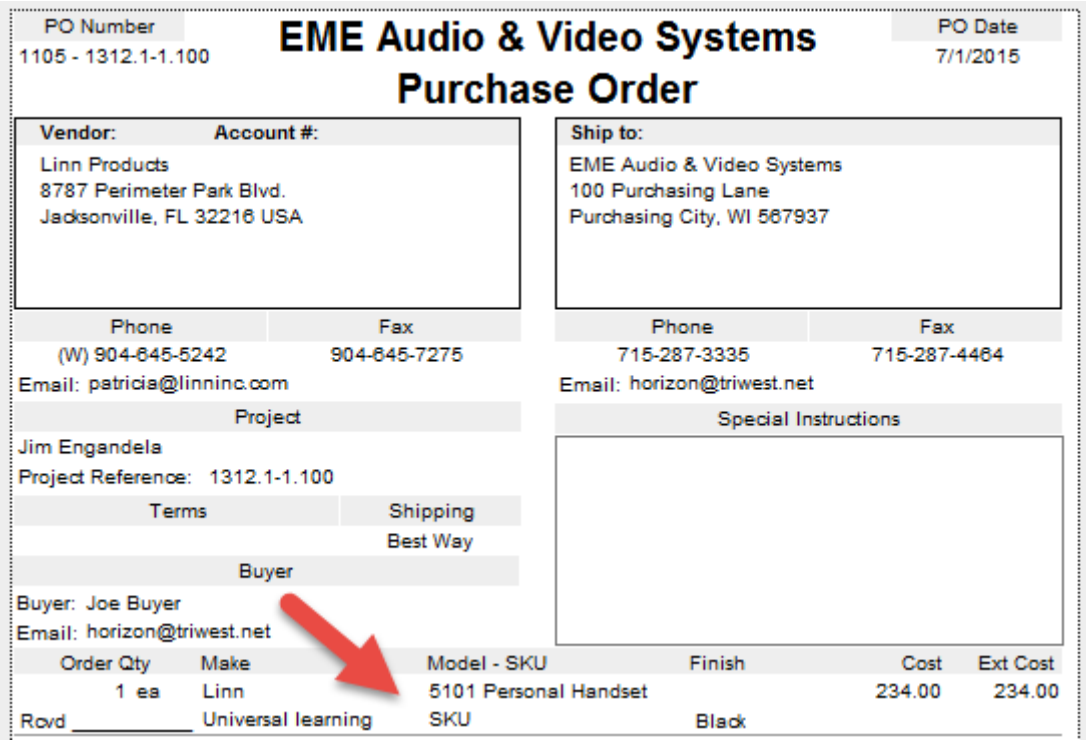




SCPS 12.0v1 Upgrade
New Features, Enhancements and Fixes
7-13-2015

Enhancement: Project/PO's: Add SKU to all screens, PO's and Reports





PO Number
1105 - 1312.1-1.100

EME Audio & Video Systems
Purchase Order

PO Date
7/1/2015

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

Phone	Fax
(W) 904-645-5242	904-645-7275

Email: patricia@linninc.com

Ship to:
EME Audio & Video Systems
100 Purchasing Lane
Purchasing City, WI 567937

Phone	Fax
715-287-3335	715-287-4464

Email: horizon@triwest.net

Project
Jim Engandela
Project Reference: 1312.1-1.100

Special Instructions

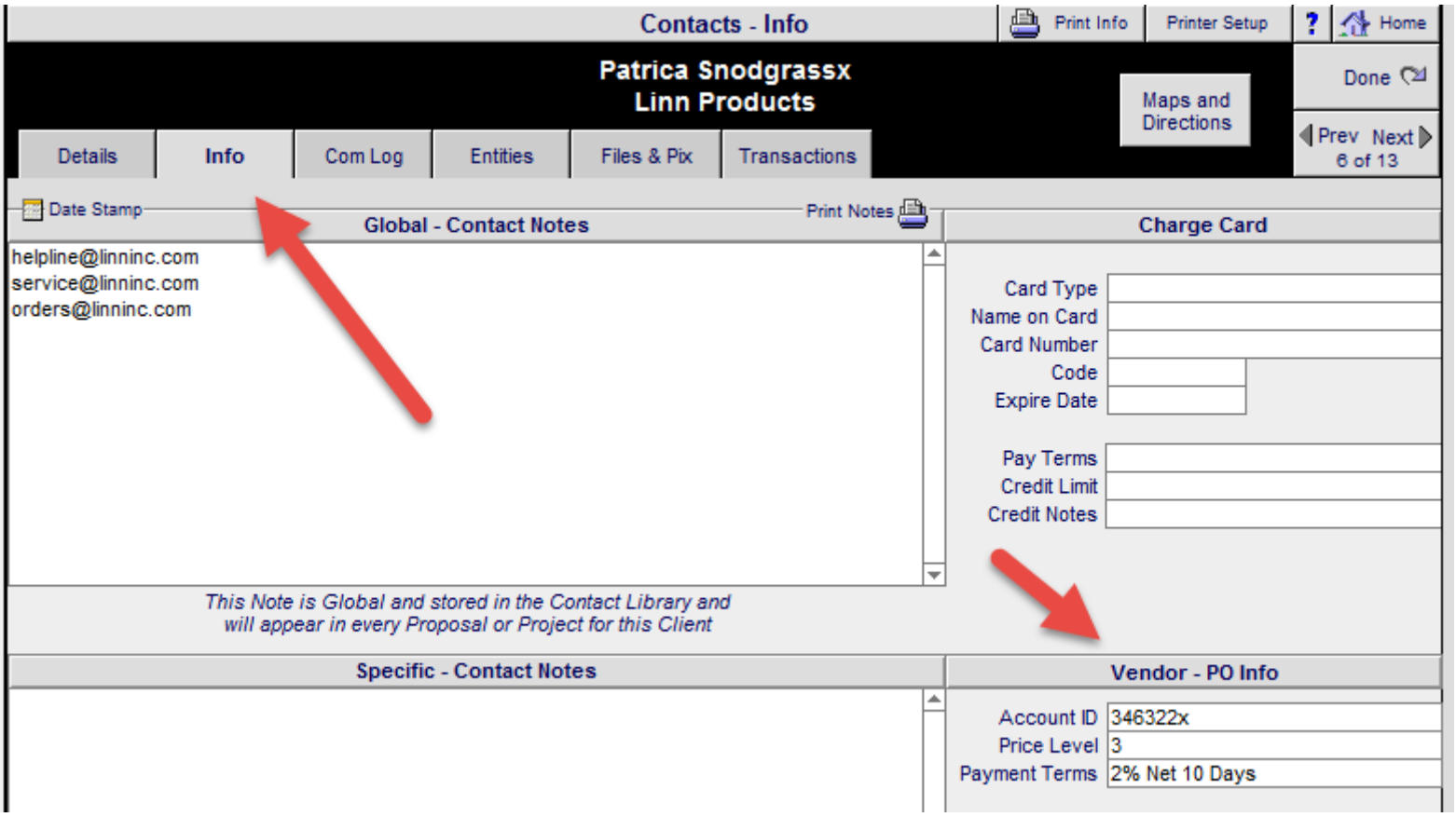
Terms	Shipping
	Best Way

Buyer
Buyer: Joe Buyer
Email: horizon@triwest.net

Order Qty	Make	Model - SKU	Finish	Cost	Ext Cost
1 ea	Linn	5101 Personal Handset		234.00	234.00
Rcvd _____	Universal learning	SKU	Black		

Enhancement: Project/PO's: Add Vendor Contact and PO Info

Vendor - PO Info entered into Contacts/Info will now appear in Project PO's.



Contacts - Info
Print Info | Printer Setup | ? | Home

Patrica Snodgrassx
Linn Products

Maps and Directions
Done
Prev Next
6 of 13

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

Date Stamp
Global - Contact Notes
Print Notes

helpline@linninc.com
service@linninc.com
orders@linninc.com

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	

Specific - Contact Notes

Vendor - PO Info

Account ID	346322x
Price Level	3
Payment Terms	2% Net 10 Days

Setup | Delete PO | **Project - Purchase Order - QB Link** | 7/1/2015 Post PO | Prev/Next | ?

Link Utility | QB Registered FBL 4.1.6 | Vendor Address | Ship To Address | Hide Prices

PO Number 1107 - 1312.1-1.100
User PO #
PO Date 7/1/2015

Show: PO Number, User PO#, Client Name

Linn Products
8787 Perimeter Park Blvd.
Jacksonville, FL 32216 USA

EME Audio & Video Systems
100 Purchasing Lane
Purchasing City, WI 567937

Done | Preview PO

1. Open QuickBooks — *QuickBooks must be on this computer*
2. Query Vendors
3. Print & Post SI — QB Invoice Number
4. Post to Quickbooks — QB Transaction Date 07/01/2015
5. Close Link

1312.1-1.100
Jim Engandela

Buyer: Joe Buyer
Buyer Override:
Shipping Method: Best Way
Vendor Pricing Level: 3
Vendor - Customer ID: 123456
Vendor Payment Terms: 2% Net 10 Days
PO Notes: Notes

Receiving
Open
Auto Receive All PO Items
Date Received
Received By
PO Total $234.00

Global Buy Pkg Off

Order Qty / Buy Qty	Make / Description	Model / SKU	Finish	Unit Raw Cost	Ext Raw Cost	Receive / View-Edit	Qty Recvd	Qty Open
1 ea	Linn	5101 Personal Handset	Black	$234.00	$234.00	Receive		1 ea
1 ea	Universal learning	SKU	note:					

PO Number 1107 - 1312.1-1.100

EME Audio & Video Systems
Purchase Order

PO Date 7/1/2015

Vendor: Account ID 346322x
Linn Products
8787 Perimeter Park Blvd.
Jacksonville, FL 32216 USA

Ship to:
EME Audio & Video Systems
100 Purchasing Lane
Purchasing City, WI 567937

Phone	Fax	Phone	Fax
(W) 904-645-5242	904-645-7275	715-287-3335	715-287-4464

Email: patricia@linninc.com
Email: horizon@triwest.net

Project
Jim Engandela
Project Reference: 1312.1-1.10

Special Instructions
Notes

Terms	Pricing Level
2% Net 10 Days	3

Shipping
Best Way

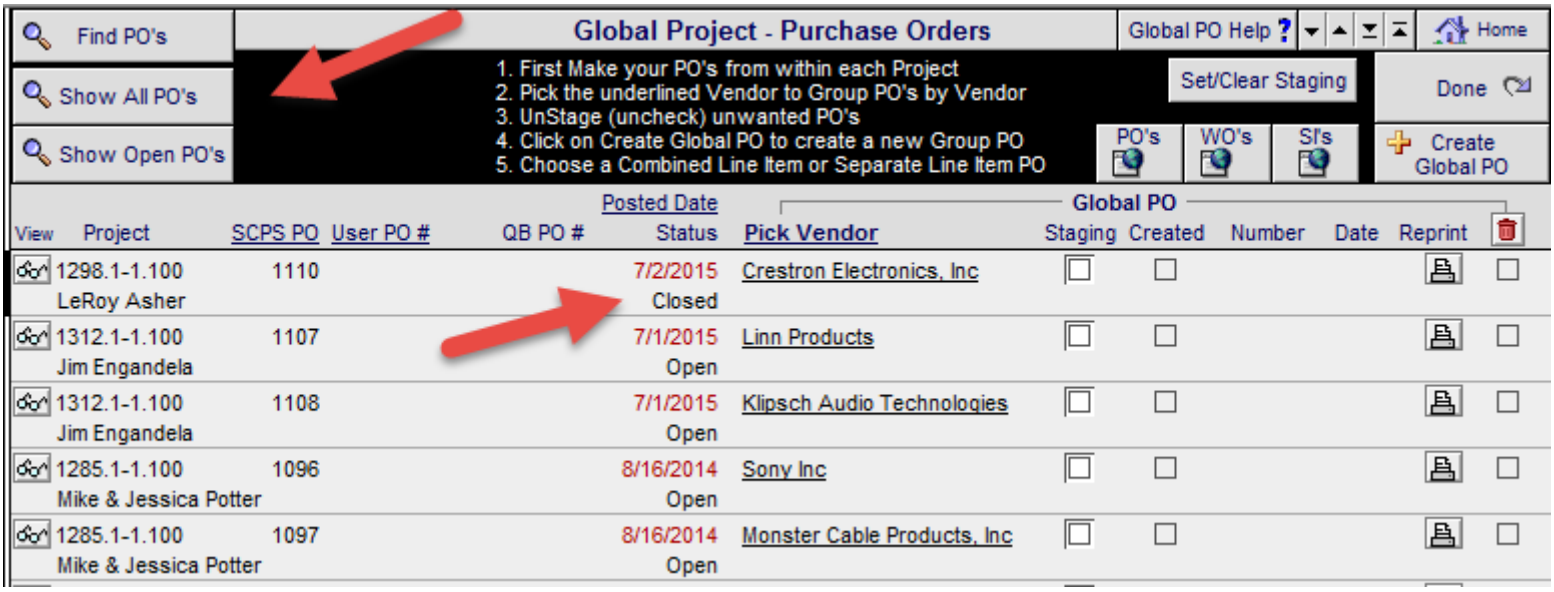
Buyer
Buyer: Joe Buyer
Email: horizon@triwest.net

Order Qty	Make	Model - SKU	Finish	Cost	Ext Cost
1 ea	Linn	5101 Personal Handset		234.00	234.00
Rcvd _____	Universal learning	SKU	Black		

Enhancement: Project Manager/PO's: Show Open PO's

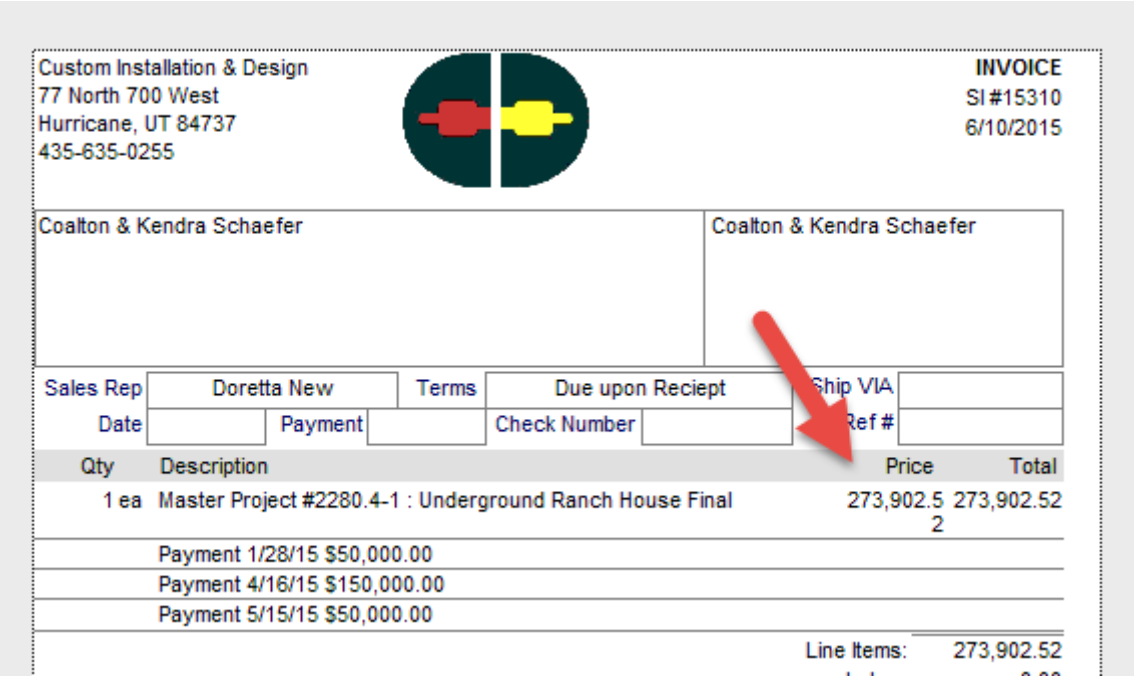
When entering the Project PO's the screen will initially only show OPEN PO's. You have the option to then Show All PO's or only Open PO's by clicking on these buttons.

The PO Status is now shown for each PO as well.



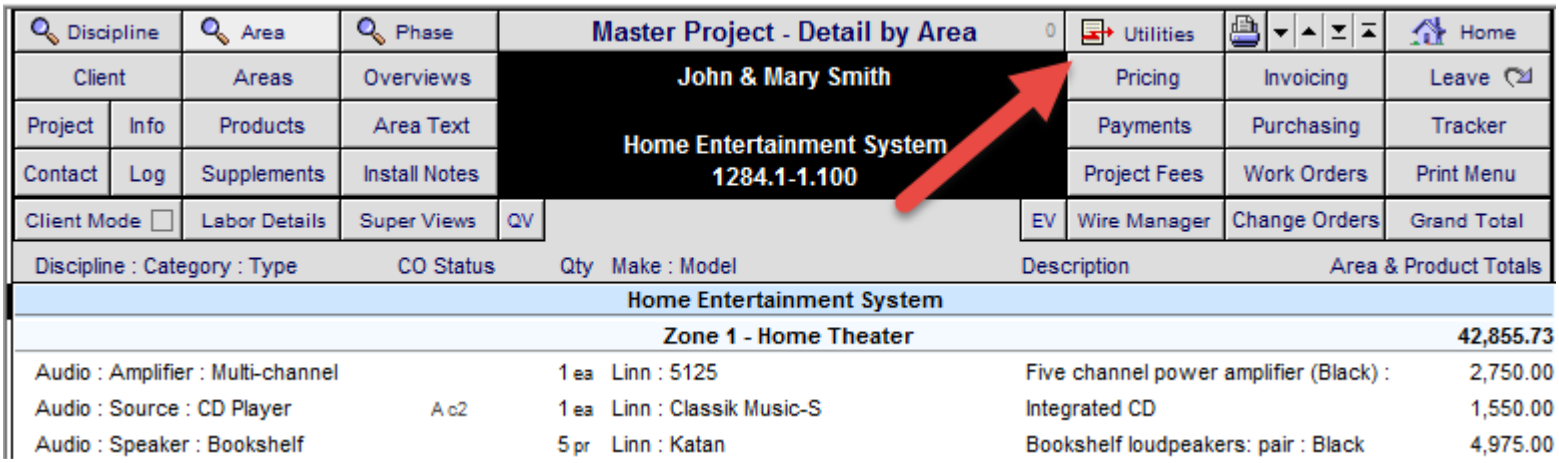
Enhancement: POS/Invoices: Increase size of Unit Price field

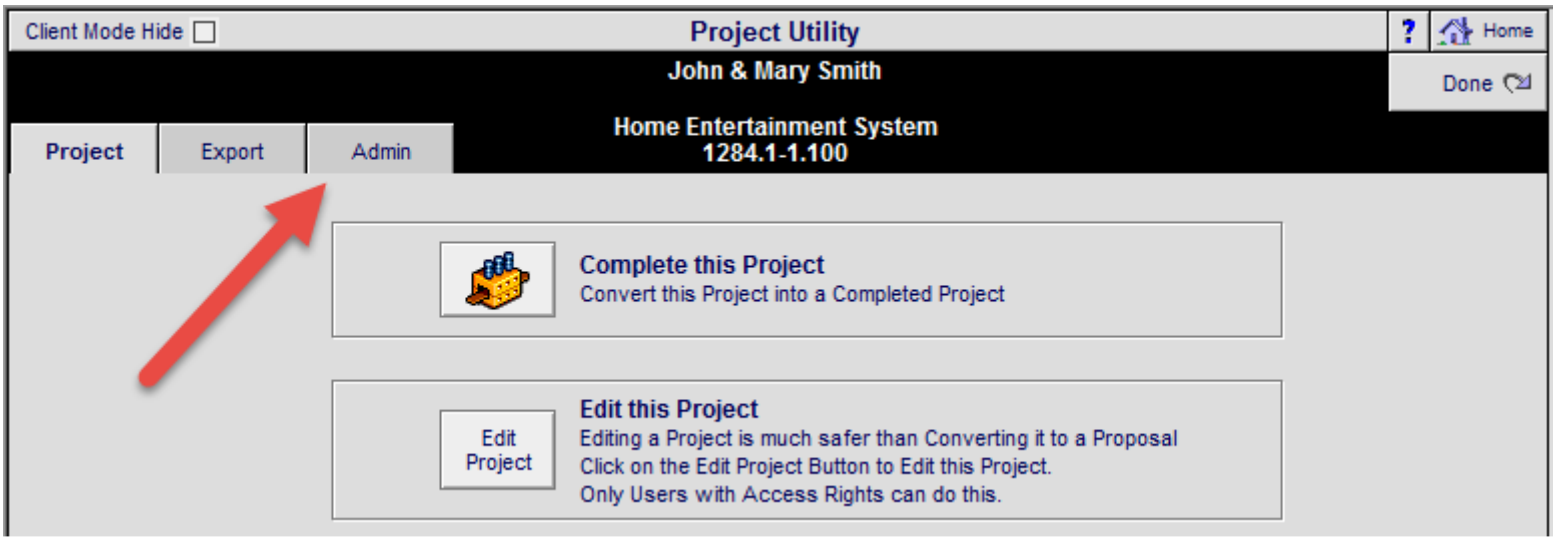
All POS Invoice Unit Price Fields have been expanded to display 8 digits.

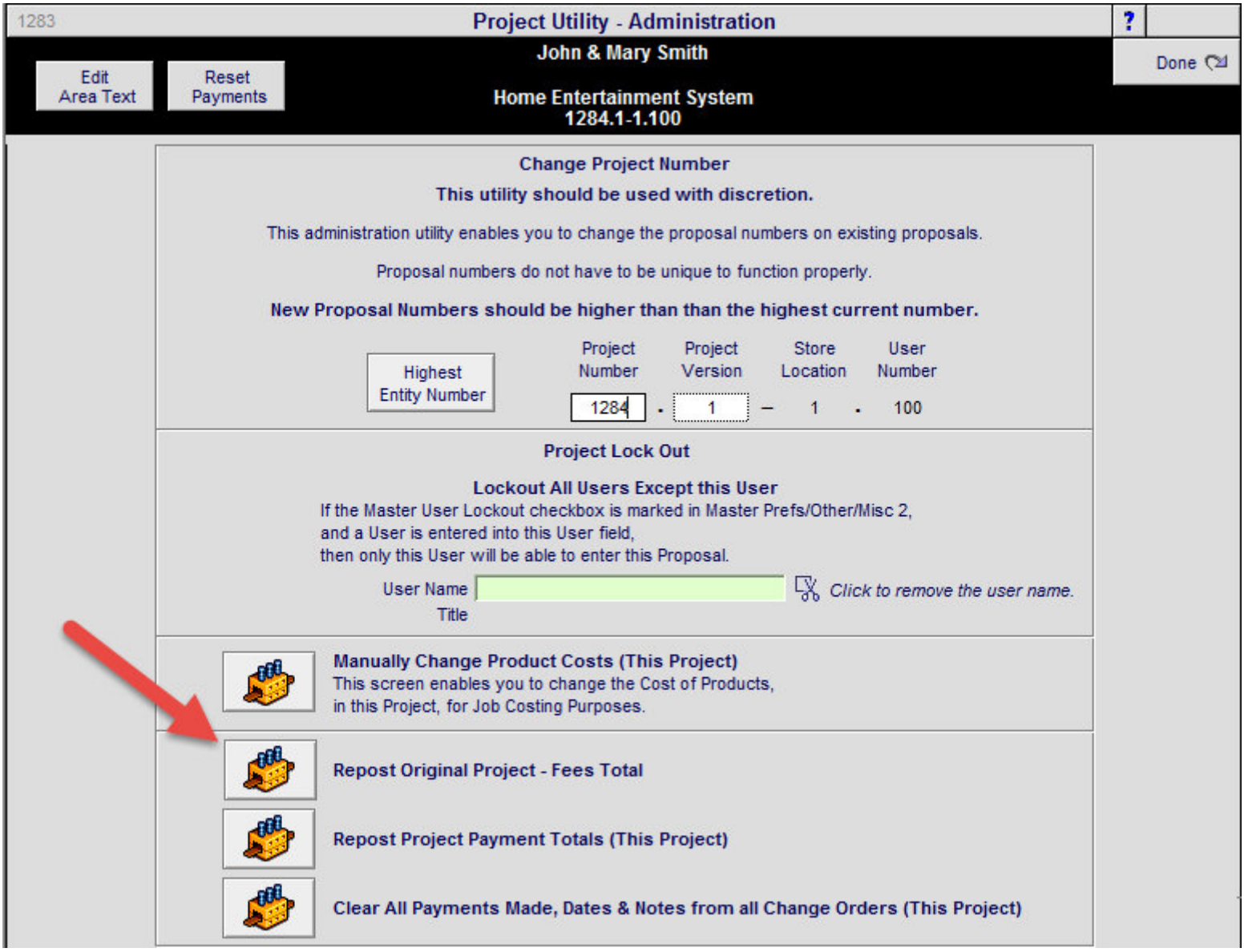


Enhancement: Project/Utility/Adm: Repost Original Project Fees

This Utility will Repost the Original Project Fees on the Master Project







Enhancement: Proposals: Probability of Sale

A new screen to monitor the Probability of the Sale has been added. This screen enables you to enter the Probability % and the estimated Install Phase Month. You can also sort by Probability in Ascending or Descending Order or by Install Phase Month.

Find Proposals | Fav A | B | C | 24 Proposals | **Proposal "Probability of Sale"** | Sort | Print | ? | Home

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

Access Levels
- Administrator
- Manager
- User

■ = User Lock
■ = Global Proposal

EME audio & video

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

Leave

Sort
Sale Probability

Status	View	Number	User	Client	Company	Created	Total	Fav	Probability	Pre	Trm	Fin
●		1289.1-1.100		Christenson, Lee	North American Fly LTD	4/26/2007	$7,871		90%	Dec	Mar	Jun
●		1312.1-1.100		Engandela, Jim		10/22/2014	$8,101		75%	Apr	May	Aug
●		1308.1-1.100		Engandela, Jim		9/10/2014	$0		1%	Sep	Aug	Jul

7/8/2015 **Proposal "Probability of Sale"** 1

Mr. & Mrs. Christenson
North American Fly LTD

Status	Number	User	Client	Created	Total	Fav	Probability	Pre	Trm	Fin
	1289.1-1.100		Christenson, Lee North American Fly LTD	4/26/2007	$7,871		90%	Dec	Mar	Jun
	1312.1-1.100		Engandela, Jim	10/22/2014	$8,101		75%	Apr	May	Aug
	1308.1-1.100		Engandela, Jim	9/10/2014	$0		1%	Sep	Aug	Jul

Enhancement: POS: PO Comments - Bold and Red Text

The POS PO Comments field now prints in Red Bold format

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

Purchase Order
PO #7193 - 123456789

9/29/2005

BTX
5 Skyline Drive
Hawthorne, NY 10532
United States

Work: 1-800-666-0996

Fax: 1-800-569-4244

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

Need By	Reference	Ship To: Shop Warehouse:

Buyer	Reference 2	Ship VIA	FOB	Terms
Tina McKnight				

Qty	Description	Price	Total
1 ea	Male D-SUB 9 pin screw terminal connector	15.95	15.95
1 ea	Female D-SUB 9 pin screw terminal connector	15.95	15.95

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.

Total: 31.90

Enhancement: Project/Print Menu/Projects/Staging Reports: Add SKU & Received Lines

The Product SKU number is now on a separate line and addition Receiving lines have been added.

7/12/2015

Total Qty
Sorted by Make-Model

EME Audio & Video Systems - Confidential Report

Staging Document - Products

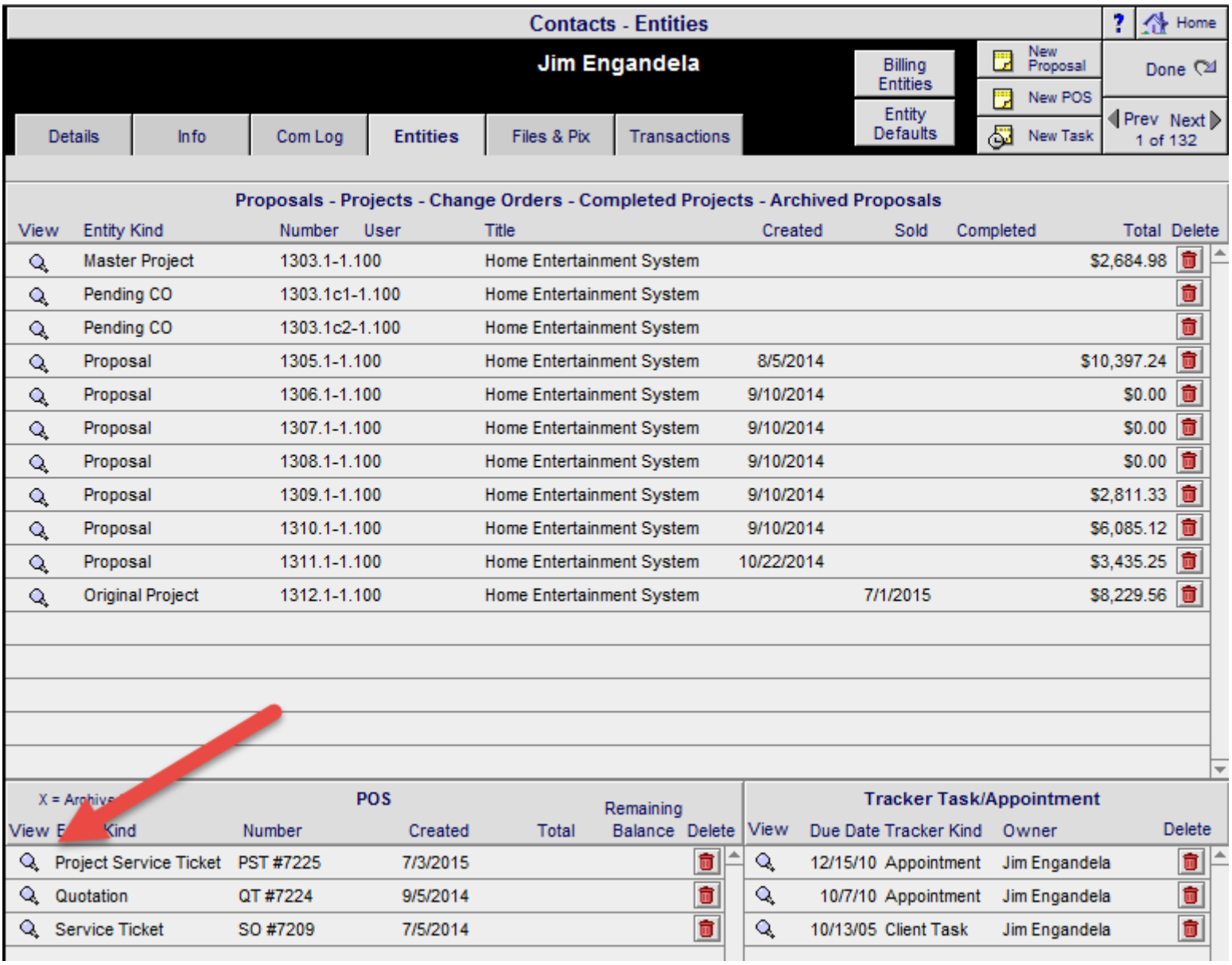
Pat Klise Capitol Sales Company
Home Entertainment System
1267.1-1.100

Page 1

Phase-Class	Qty	Make-Model-Finish SKU Description Unit Cost-Unit Sell		Ck	InStock	OnOrder	Date	Initial
2 Trim	3 ea	Crestron : AADS : Black	Order					
		Adagio Audio Distribution System	Rc'vd					
		$1,250.00 $2,500.00	Rc'vd					
			Stock					
			Delivered					
		#						
3 Final	1 ea	Klipsch : RC-35 : Black Ash	Order					
		Center Channel Speaker	Rc'vd					
		$210.00 $399.00	Rc'vd					
			Stock					
			Delivered					
		#						
3 Final	2 ea	Klipsch : RF-35 : Black Ash	Order					
		Reference Tower Speaker	Rc'vd					
		$262.50 $499.00	Rc'vd					
			Stock					
			Delivered					
		#						
3 Final	2 ea	Klipsch : RS-7 : Matte Black	Order					
		Reference Surround Speaker	Rc'vd					
		$236.50 $450.00	Rc'vd					
			Stock					
			Delivered					
		#						
3 Final	1 ea	Klipsch : RSW-10 : Black Ash	Order					
		Reference Subwoofer	Rc'vd					
		$525.00 $1,000.00	Rc'vd					
			Stock					
			Delivered					
		#						
2 Trim	2 ea	Linn : 5101 Personal Handset : Black	Order					
		SKU	Rc'vd					
		Universal learning remote	Rc'vd					
		$234.00 $390.00	Stock					
			Delivered					

Fix: Contact Entities: Clicking on a Project Ticket now goes to the Project Ticket

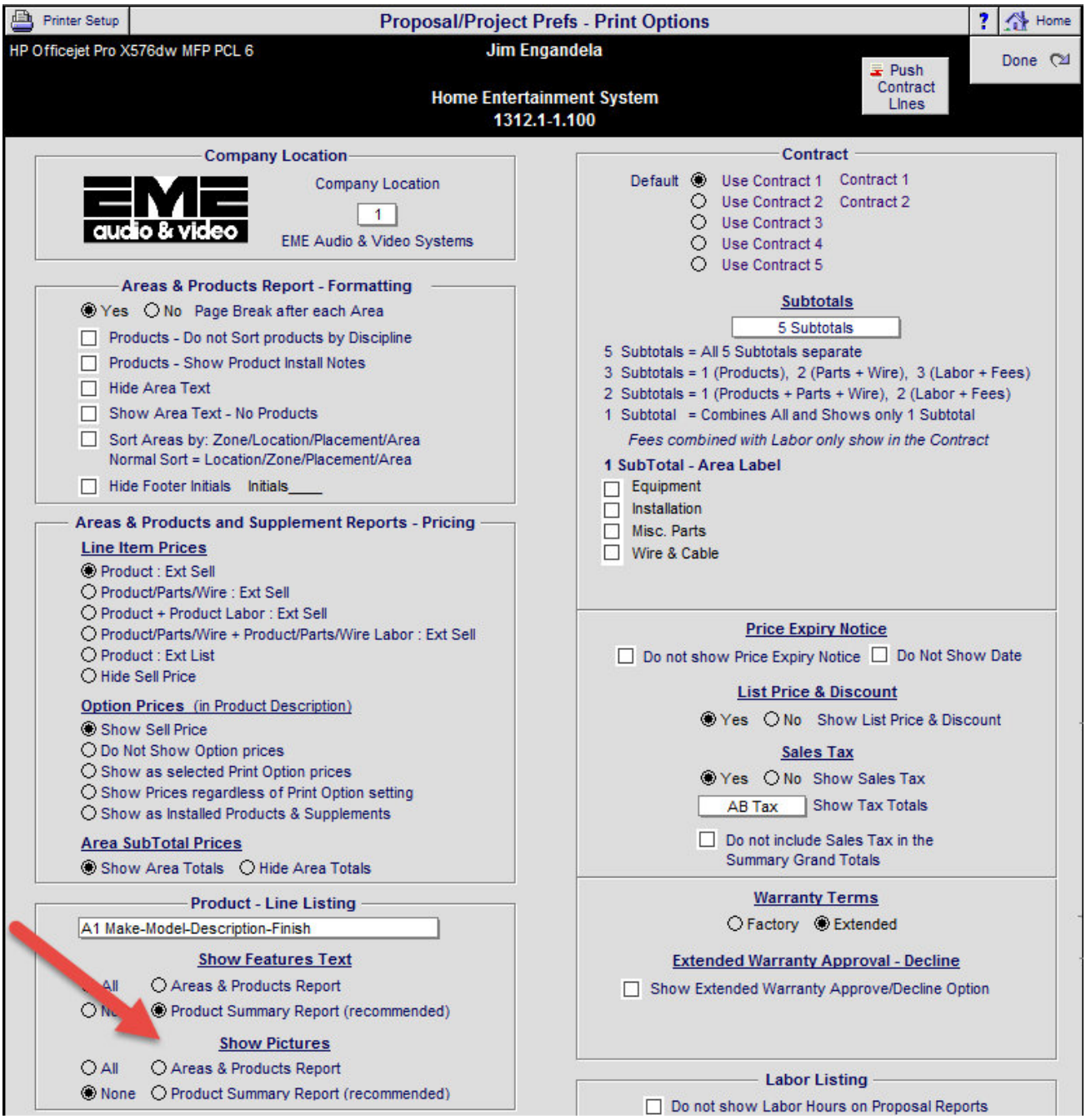
Clicking on the Done button in the Project Ticket returns to the Contact Entity screen.



SCPS 11.9v4 Upgrade
New Features, Enhancements and Fixes
6-29-2015

Fix: Proposal/Print Menu/Print Options: Show Pictures Option

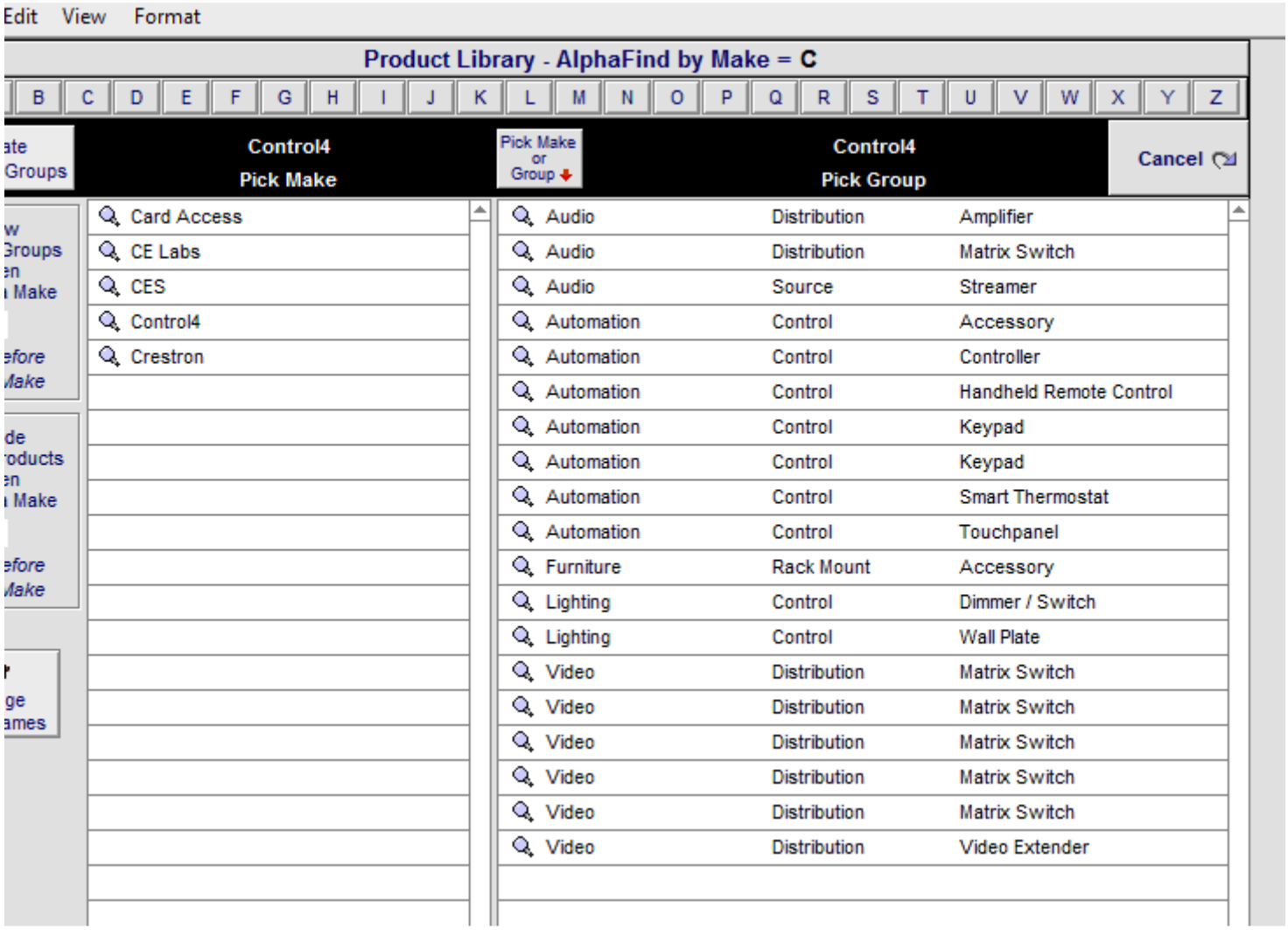
The option to Not Show Product Pictures on All Reports and/or specific Reports, now works properly.



SCPS 11.9v3 Upgrade
New Features, Enhancements and Fixes
6-15-2015

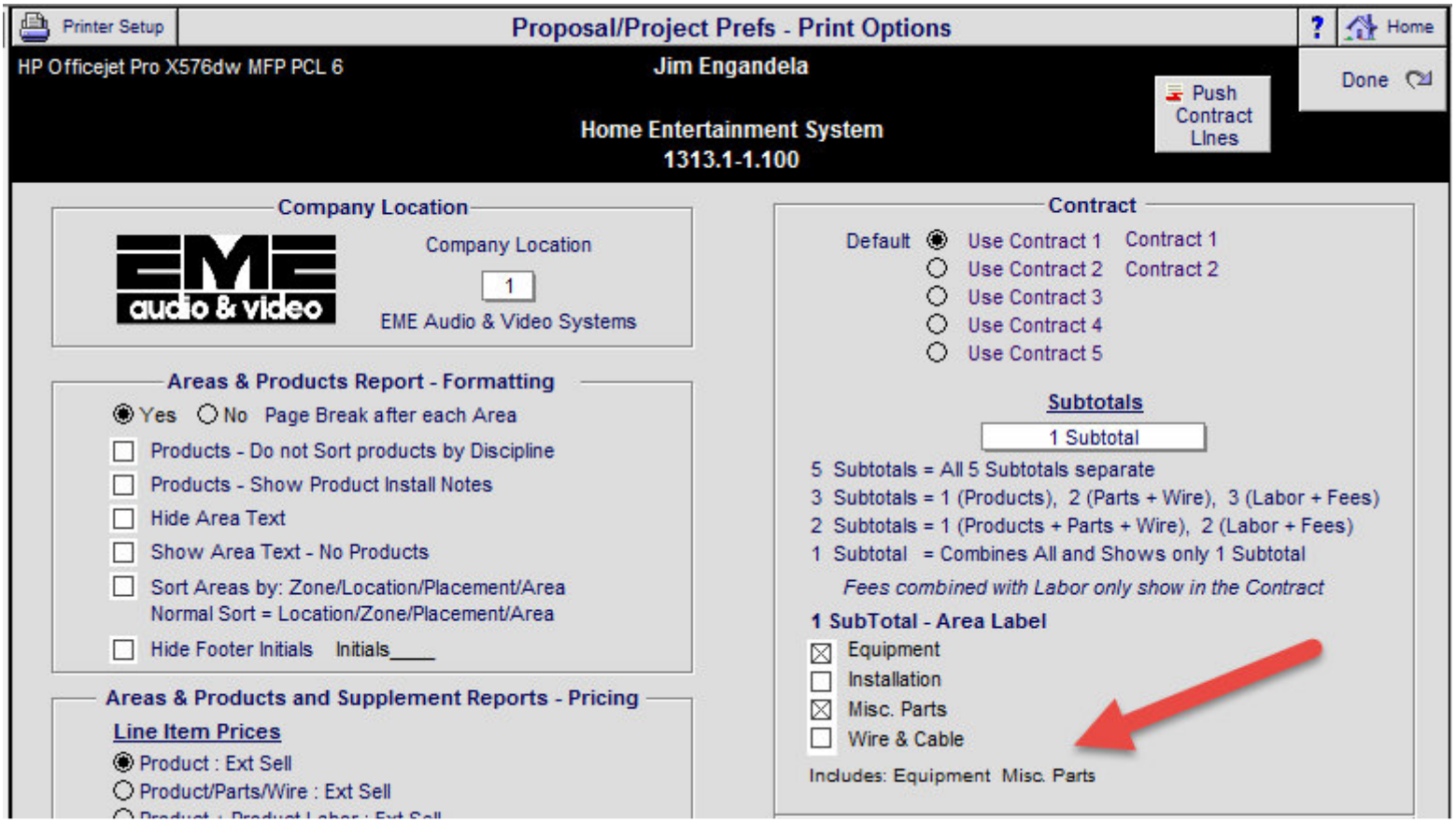
Fix: Improve Product Library Group Update Routine

Updating the Product Library, Alpha Finder - Make and Group listing now only shows one iteration of each Group



Fix: Proposal/Print Menu/Options: Display Single Subtotal Text Line

The Single Subtotal Text Lines was showing on Proposal Reports even when all Check Boxes were not checked. This has been fixed.



SCPS 11.9v2 Upgrade
New Features, Enhancements and Fixes
6-10-2015

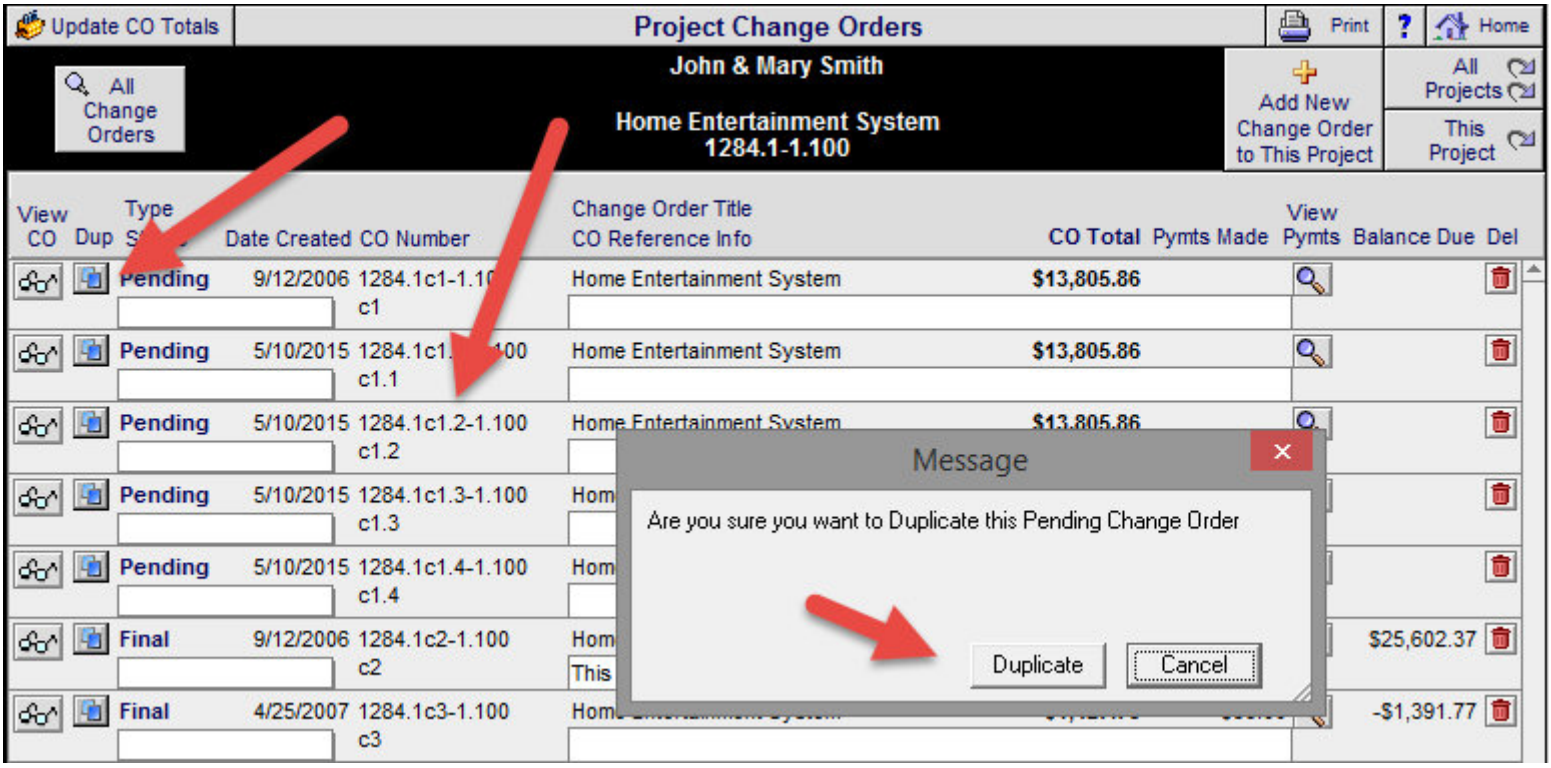
Fix: Product Library/Product Detail/Wire Supplement: Adding Bulk Wire Class Correction

When Picking Products into a Proposal that have User Assigned Pre-Cut Wire Supplements, the Wires were being assigned a Bulk Wire Classification. This has been fixed.

SCPS 11.9v1 Upgrade
New Features, Enhancements and Fixes
6-4-2015

Enhancement: Duplicate Pending Change Orders

Pending Change Orders can now be Duplicated and then modified for a specific Project.



Enhancement: Edit Pending CO Payments

Users can now Edit Pending Change Order Payments

Clear All Manual Payments

Pending Change Order - Edit Payment Terms

Reset | Print | ?

Set Payments to the Default CO Terms

John & Mary Smith

Home Entertainment System
1284.1c2-1.100

Done

Installation Type
New-3 Phase Pre-Trim-Final

Installation Type Reset

New-3 Phase Pre-Trim-Final

Payment Method Update

Percentage

Payment Steps

	Deposit	Step 1 Payment	Step 2 Payment	Step 3 Payment	Holdback
Payment Labels	Deposit	Payment 1	Payment 2	Payment 3	Holdback
Payment Description		Due 10 days before the installation final phase	Due 10 days before the installation trim phase.	Due 10 days before the installation final phase	
Percentage Total: 100%	0 %	40 %	30 %	30 %	0 %
Total Payments: $25,342.24	Amount $0.00	Amount $10,136.90	Amount $7,602.67	Amount $7,602.67	Amount $0.00

Phase 1 Total $ | Phase 2 Total $ | Phase 3 Total $

Payment Step Director

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

Totals Reset

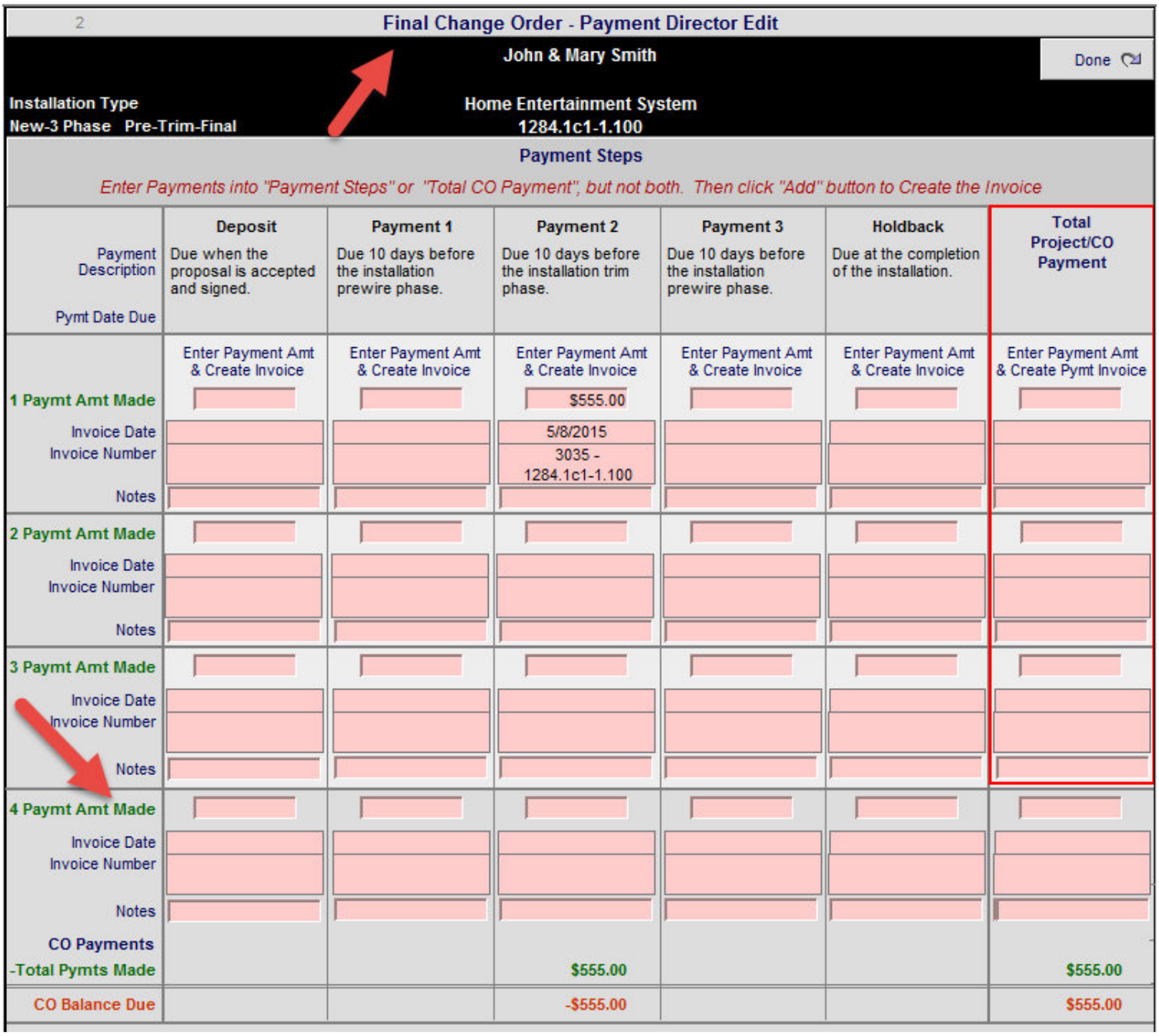
Proposal	$25,342.24
- Payments	$25,342.24
Difference Must = $0	$0.00

Edit CO Payments

Payment Description / Pymt Date Due	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
1 Paymt 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
Invoice Date						
Invoice Number						
Notes						
2 Paymt Made						
Invoice Date						
Invoice Number						
Notes						

Enhancement: Edit Final CO Payments

Administrators can now Edit Final Change Order Payment Amounts



2

Final Change Order - Payment Director Edit

John & Mary Smith

Done

Installation Type
New-3 Phase Pre-Trim-Final

Home Entertainment System
1284.1c1-1.100

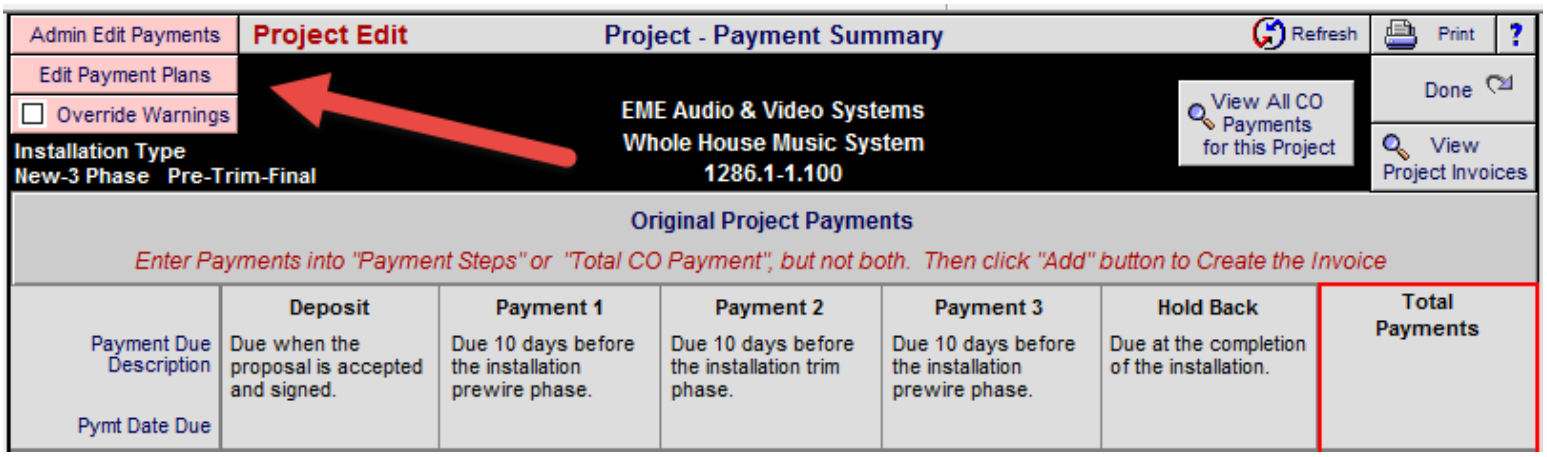
Payment Steps

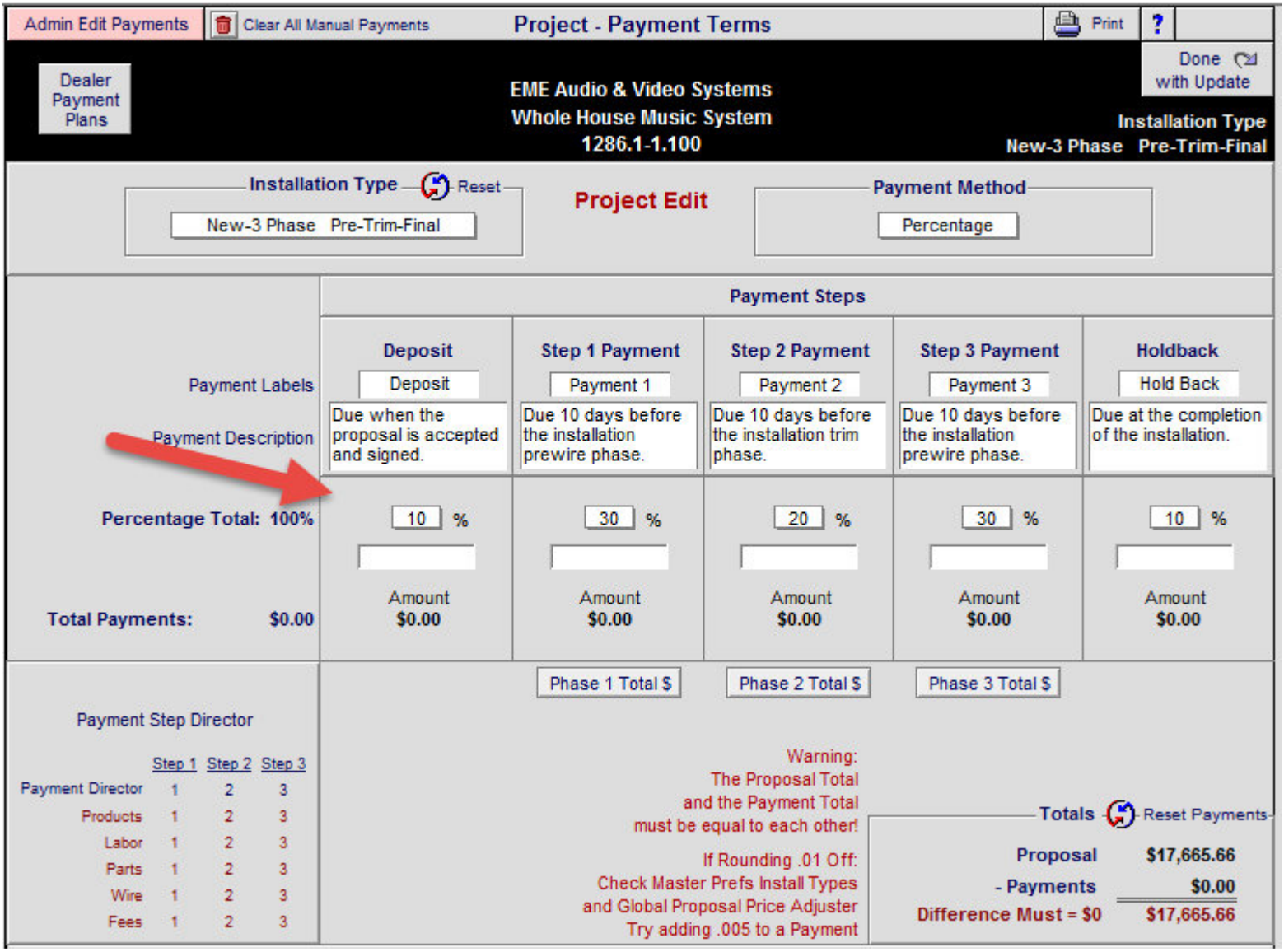
Enter Payments into "Payment Steps" or "Total CO Payment", but not both. Then click "Add" button to Create the Invoice

Payment Description / Pymt Date Due	Deposit Due when the proposal is accepted and signed.	Payment 1 Due 10 days before the installation prewire phase.	Payment 2 Due 10 days before the installation trim phase.	Payment 3 Due 10 days before the installation prewire phase.	Holdback Due at the completion of the installation.	Total Project/CO Payment
	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 Paymt Amt Made			$555.00			
Invoice Date			5/8/2015			
Invoice Number			3035 - 1284.1c1-1.100			
Notes						
2 Paymt Amt Made						
Invoice Date						
Invoice Number						
Notes						
3 Paymt Amt Made						
Invoice Date						
Invoice Number						
Notes						
4 Paymt Amt Made						
Invoice Date						
Invoice Number						
Notes						
CO Payments -Total Pymts Made			$555.00			$555.00
CO Balance Due			-$555.00			$555.00

Enhancement: Edit Project and Final CO Payments

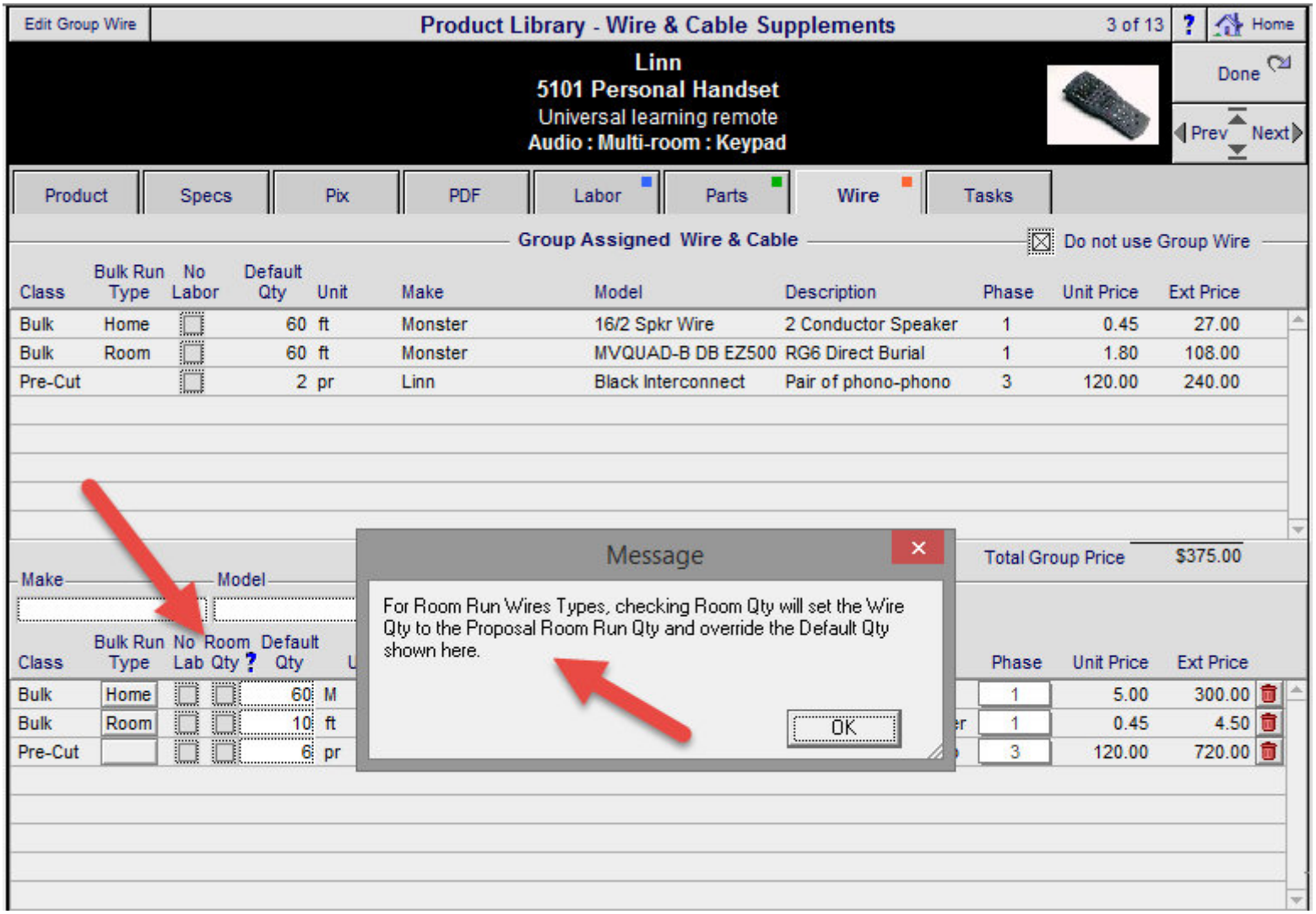
Administrators can now Edit Project Payment Percentages and Amounts





Enhancement: Product Library/Wire Supplements: Room Qty Override

You can now Check the Room Qty box and the Qty will automatically be set to the Proposal Room Run Qty when you add this wire to a Proposal.



Enhancement: Proposal/Print Menu: Cutting Edge Print Cue

Does not include the Product Summary Report

Printer Setup | PDF reDirect | Copy

Proposal - Print Menu

User Reports | Refresh | ? | Home

HP Officejet Pro X576dw MFP PCL 6 (Network),winspool,Ne02:

Jim Engandela

Home Entertainment System
1312.1-1.100

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 No Area Text
  - A&P No Qty Sums
  - 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 by Discipline

- Product Summary * by Discipline, with Totals

Hide Grand Totals and Tax

Subtotal Option: 5 Subtotals

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
Cutting Edge by Area - No Sum

User Print Cue 1

User Print Cue 2

Enhancement: Project/Purchase Order/Reports/PO Staging Report: Add Qty to Order to Report

Show All | Phase 1 | 2 | 3 | **Purchase Orders - All - 23 Products** | PO | WO | SI | ? | Home

PO Reports & Utilities | **John & Mary Smith** | **1284.1-1.100** | Products: To Order 27, Back Order 5 | Global Buy Pkg Off | Create PO | Leave | Auto Set PO Qty | View P.O.'s

PO Products | PO Pa | PO Wire | Sum | Proj | Orphan

Phase	Zone - Area	Sold / Delivered	Make : Model / CO#	Updated — Master Cost	Finish / Project Cost	Alt-x	Vendor ? / Avg PO Cost	Qty On Hand	To Order Qty	Enter PO Qty	Sum Mode - PO Status: Ordered / Staged	Recvd to date	B/O
3		1 ea	Klipsch : RC-35	6/2/2011 $210.00	Black Ash $210.00		Klipsch Audio	-2	1				
3		2 ea	Klipsch : RF-35	6/2/2011 $262.50	Black Ash $262.50		Klipsch Audio	-4	2				
3		2 ea	Klipsch : RS-7	6/2/2011 $236.50	Matte $236.50		Klipsch Audio	-4	2				
3		1 ea	Klipsch : RSW-10	6/2/2011 $525.00	Black Ash $525.00		Klipsch Audio	0	1				
2		1 ea	Linn : 5101 Personal Handset	6/2/2011 $234.00	Black $234.00		$234.00	2	0		1	1	0

Setup | **Project - PO Reports & Utilities** | ? | Home | Done

Mike & Jessica Potter

Home Theater System
1272.1-1.100

Print Staging Reports

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

☐ Hide Staging Report Pricing

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

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

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

Print Pruchasing Tracker Report

This will print a report that shows all of these totals for all of the Products in this Project

Project Qty Sold	Qty Staged	Qty to Order	Qty On Order	Qty Recvd to date	Qty Still on Order

Purchasing Tracker

Print PO Summary Report

6/4/2015

EME Audio & Video Systems - Confidential Report

Purchasing Tracker

John & Mary Smith
Home Entertainment System
1284.1-1.100

Page 1

Phase-Class	Make-Model-SKU-Finish-Description	Project Qty Sold	SCPS Qty Staged	Qty to Order	Qty On Order	Qty Recvd to date	Qty on Back Order
2 Trim Product	Linn : Diskreet-Rd : White	1 pr		2			
2 Trim Product	Linn : Diskreet-Rd : White	1 pr		2			
2 Trim Product	Sonance : CR201 : 91804	2 ea		2			
2 Trim Product	Sonance : VC60R	1 ea		1			
2 Trim Product	Linn : 5101 Personal Handset : Black	1 ea			1	1	
2 Trim	Linn : Knekt RCU : White	1 ea		4			

Enhancement: Project/Purchase Order/PO: Add SKU Number to PO

Setup | Email Vendor | Delete PO | **Project - Purchase Order Detail** | 5/29/2015 Post PO | Prev/Next | ?

Do not show Client/Project info on PO | **Vendor Address** | **Ship To Address** | Hide Prices

PO Number 1103 - 1272.1-1.100
User PO #
PO Date 5/29/2015

Show
PO Number
User PO#
Client Name

Linn Products
8787 Perimeter Park Blvd.
Jacksonville, FL 32216 USA

EME Audio & Video Systems
100 Purchasing Lane
Purchasing City, WI 567937

Done
Preview
Print & Post

1272.1-1.100
Mike & Jessica Potter

Buyer: Joe Buyer
Buyer Override:
Shipping Method: Best Way
PO Terms:

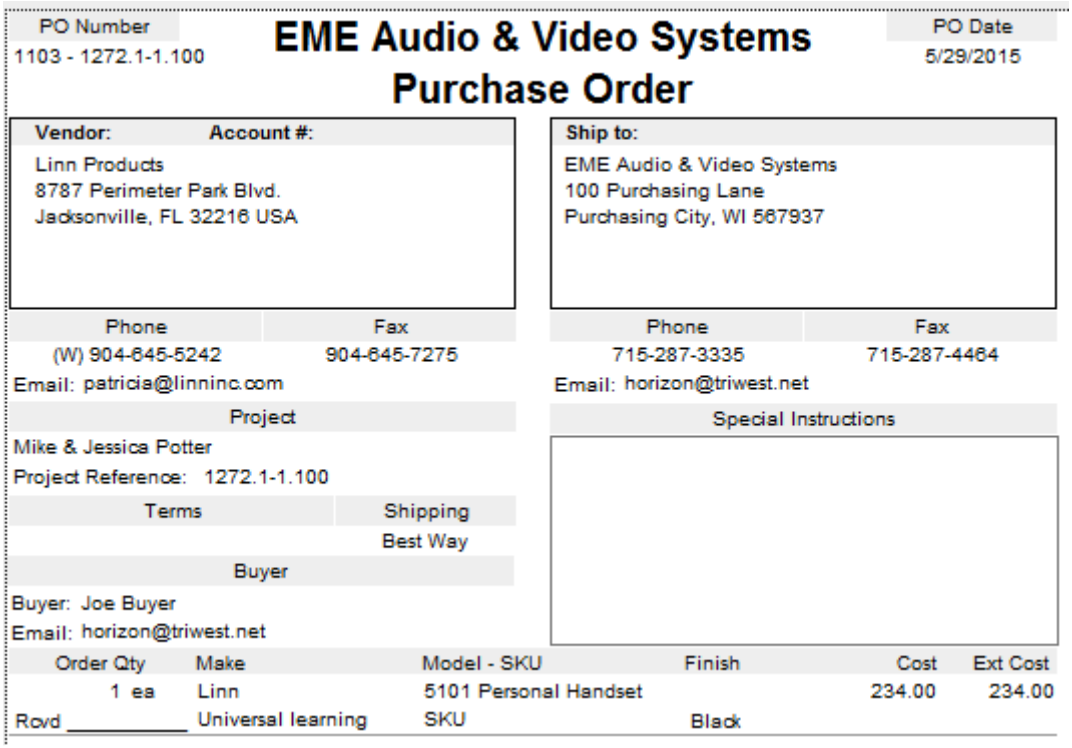
PO Notes

PO Total
$234.00

Open **Receiving**
Auto Receive All PO Items
Date Received
Received By

Global Buy Pkg Off | Cost Override

Order Qty / Buy Qty	Make / Description	Model / SKU	Finish	Unit Raw Cost	Ext Raw Cost	Receive / View-Edit	Qty Recvd	Qty Open
1 ea	Linn	5101 Personal Handset	Black	$234.00	$234.00	Receive		1 ea
1 ea	Universal learning	SKU	note:					



PO Number
1103 - 1272.1-1.100

EME Audio & Video Systems
Purchase Order

PO Date
5/29/2015

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

Ship to:
EME Audio & Video Systems
100 Purchasing Lane
Purchasing City, WI 567937

Phone	Fax	Phone	Fax
(W) 904-645-5242	904-645-7275	715-287-3335	715-287-4464

Email: patricia@linninc.com
Email: horizon@triwest.net

Project
Mike & Jessica Potter
Project Reference: 1272.1-1.100

Special Instructions

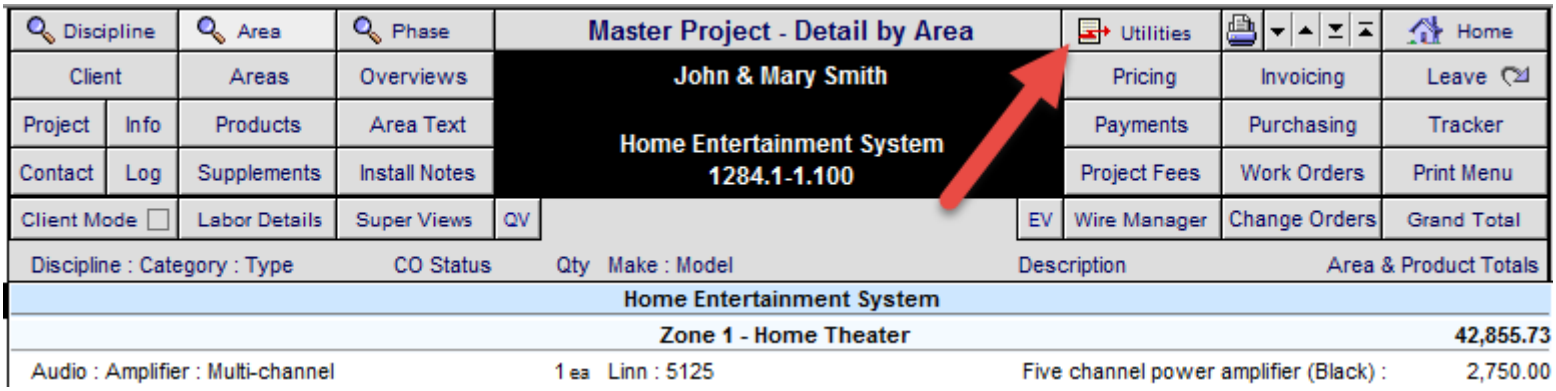
Terms	Shipping
	Best Way

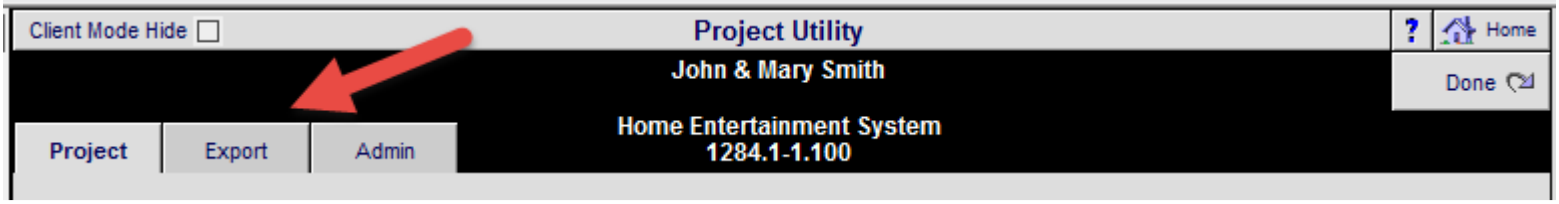
Buyer
Buyer: Joe Buyer
Email: horizon@triwest.net

Order Qty	Make	Model - SKU	Finish	Cost	Ext Cost
1 ea	Linn	5101 Personal Handset		234.00	234.00
Rcvd _____	Universal learning	SKU	Black		

Enhancement: Project/Utility/Export: Export Project to Excel including Products, Parts, Wire, Fees

You can now Export the Entire Project to a file that can be opened with Excel, including Change Order Products, Supplements and Fees.





Project Utility - Export

John & Mary Smith

Home Entertainment System
1284.1-1.100

Project | Export | Admin

Home | Done

Impact GraphicsDraw! Data Export - Help guides are on the GraphicsDraw screen.

Example of file name produced. GD_OrgChart_1296.1-1.100.tab

Export Project Data - By Discipline

Export Project Data - By Area

Export Project Data - By Phase

This utility will export this Proposal/Project and let you name the file.

Export this Project as a dbf File
This utility will export **Only Products** in this Project Products, into a file you can open with Excel.

Export includes these Product Fields
QTY - UNIT - MAKE - MODEL - QB_SKU - DESCRIPTION - FINISH
DISCIPLINE - CATEGORY - TYPE - CLASS - PHASE
UNIT_COST - UNIT_SELL - Ext_SELL - UNIT_LABOR - TAX

Export this Project as a dbf File
This utility will export **All Products, Wire, Parts and Labor** in this Project, into a file you can open with Excel.

Export includes these Product Fields
QTY - UNIT - MAKE - MODEL - QB_SKU - DESCRIPTION - FINISH
DISCIPLINE - CATEGORY - TYPE - CLASS - PHASE
UNIT_COST - UNIT_SELL - Ext_SELL - UNIT_LABOR - TAX

SCPS 11.8v4 Upgrade
New Features, Enhancements and Fixes
5-5-2015

Enhancement: RCMS: Project/Upload to RCMS Post Screen expansion

Additional columns and fields have been added to the RCMS Post screen to enable users to review all of the necessary information before posting a Project into RCMS.

RCMS Utility - Post SCPS Project to RCMS

Done Post to RCMS | Cancel

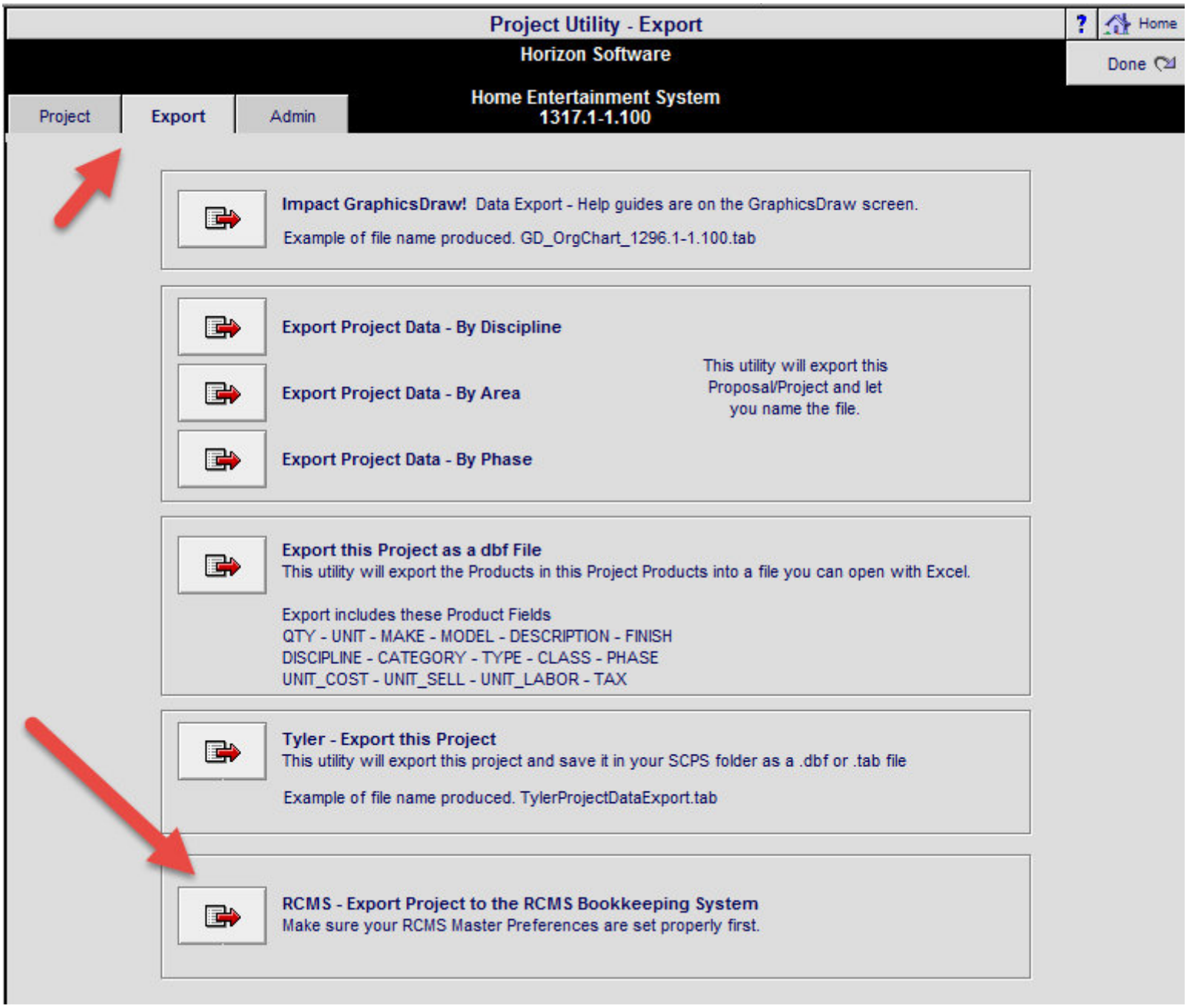
1317.1-1.100

Set the Order Location and Deliver Locations if necessary

Order Loc	Deliver Loc	Hold	Minor Dept	Classification	Qty	Make ID	Make	Model	Description	Extended Sell	Tax Code	RCMS Tax Code Master Prefs	Phase #	Install PZ Date	Labor Amt Phase 1	Labor Amt Phase 2	Labor Amt Phase 3	Employ #	Tag Supplements Delete
07	07	☐	NCS	Product	3	GRA	Grado	BLACK	Cartridge	$119.85	T Taxable		3	7/27/2015				100	☐
07	07	☐	TTU	Product	2	SON	Sony	PSLX350H	Turntable	$399.9	T Taxable		3	7/27/2015				100	☐
07	07	☐	TTU	Product	2	SON	Sony	PSLX350H	Turntable	$399.9	T Taxable		3	7/27/2015				100	☐
07	07	☐	ERC	Product	1	SON	Sony	TCKA1ESA	Tape deck	$299.95	T Taxable		3	7/27/2015				100	☐
07	07	☐	AMI	Part	1	ACO	Audio Control	RACKMOUNTS	Rackmounts	$24.95	T Taxable		3	7/27/2015				100	☐
07	07	☐	AMI	Part	3	BOS	Bose	26232	Wall plate	$149.85	T Taxable		3	7/27/2015				100	☐
07	07	☐	AMI	Part	2	CAS	Case Logic	MPC1	Mp3 armband case	$19.98	T Taxable		3	7/27/2015				100	☐
07	07	☐	APC	Pre-Cut Wire &	2	MON	Monster Cable	GSRB	102555 intcon	$4	T Taxable		3	7/27/2015				100	☐
07	07	☐	APC	Pre-Cut Wire &	2	MON	Monster Cable	I10012M	*intcon	$139.9	T Taxable		3	7/27/2015				100	☐
07	07	☐	AWI	Bulk Wire & Cable	120	MON	Monster Cable	AUDIODAT	103451	$240	T Taxable		3	7/27/2015				100	☐
07	07	☐	AWI	Bulk Wire & Cable	100	MON	Monster Cable	DS350C5EZ1000TA	100998 tan cat-5	$20	T Taxable		3	7/27/2015				100	☐
07	07	☐	AWI	Bulk Wire & Cable	50	MON	Monster Cable	MCTS350	103462	$150	T Taxable		3	7/27/2015				100	☐
07	07	☐	NQL	Labor	0:00:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	$0	E Exempt				0	0	0	100	☐
07	07	☐	NQL	Labor	0:00:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	$0	E Exempt				0	0	0	100	☐
07	07	☐	NQL	Labor	0:00:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	$0	E Exempt				0	0	0	100	☐
07	07	☐	NQL	Labor	2:00:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	$120	E Exempt		1	5/28/2015	120	0	0	100	☐
07	07	☐	NQL	Labor	4:00:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	$320	E Exempt		2	6/27/2015	0	320	0	100	☐
07	07	☐	NQL	Labor	6:00:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	$600	E Exempt		3	7/27/2015	0	0	600	100	☐
07	07	☐	NQL	Labor	0:30:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	$25	E Exempt		3	7/27/2015	0	0	25	100	☐
07	07	☐	NQL	Labor	1:00:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	$60	E Exempt		3	7/27/2015	0	0	60	100	☐
07	07	☐	NQL	Labor	0:10:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	$10	E Exempt		3	7/27/2015	0	0	10	100	☐
07	07	☐	NQL	Fee	1	FLA	FLA	CUSLAB	CUSTOM INSTALL	$92.62	E Exempt		1	5/28/2015				100	☐
07	07	☐	NQL	Fee	1	FLA	FLA	CUSLAB	CUSTOM INSTALL	$34.17	E Exempt		1	5/28/2015				100	☐

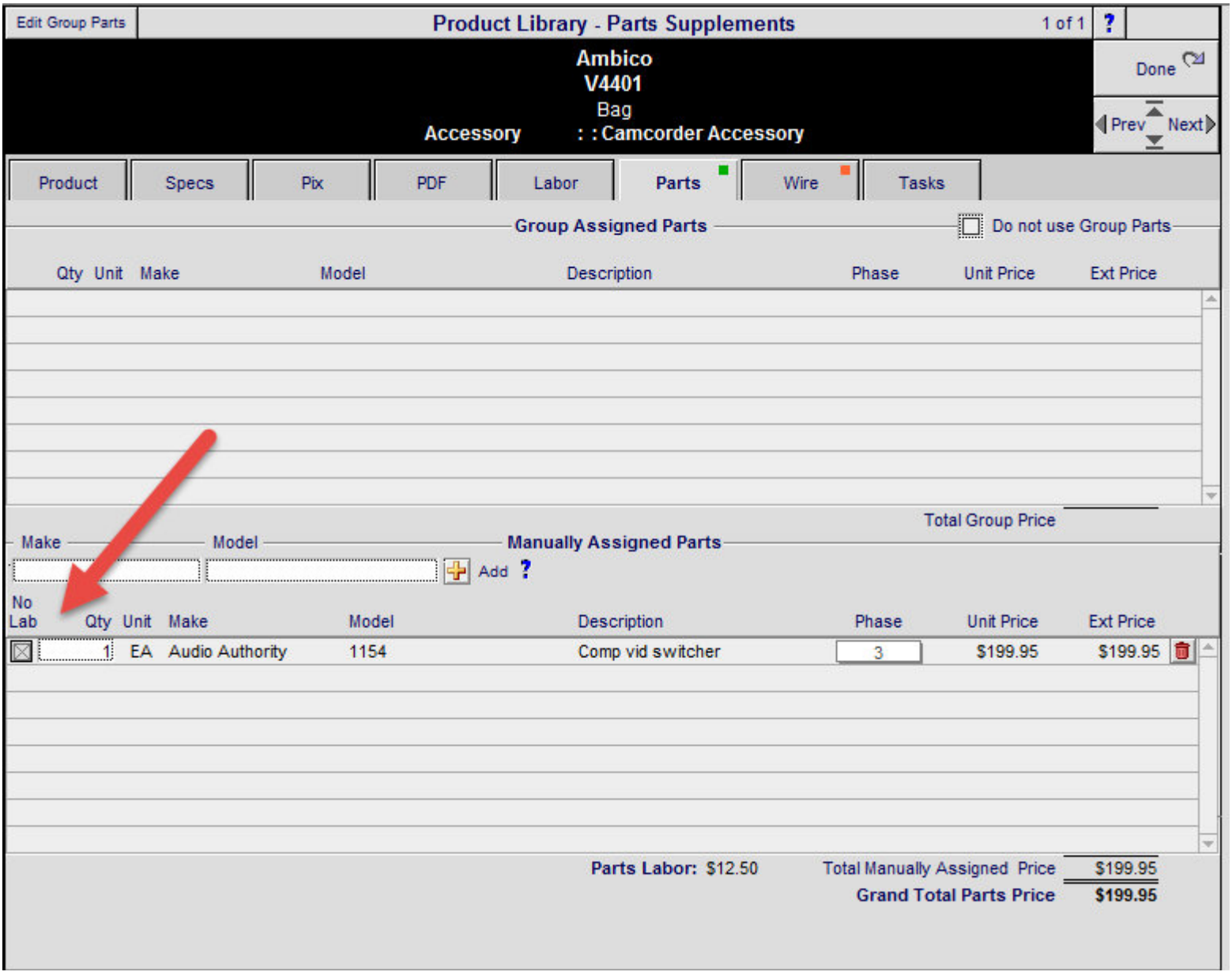
Enhancement: RCMS: Project/Utility/Export: Manual Upload to RCMS button

In additional or instead of using the Automatic Upload to RCMS feature in Master Prefs/Bookkeeping/RCMS, users can now choose to Manually start the Upload to RCMS process from within any Project.



Enhancement: Product Library/Parts: No Labor Option

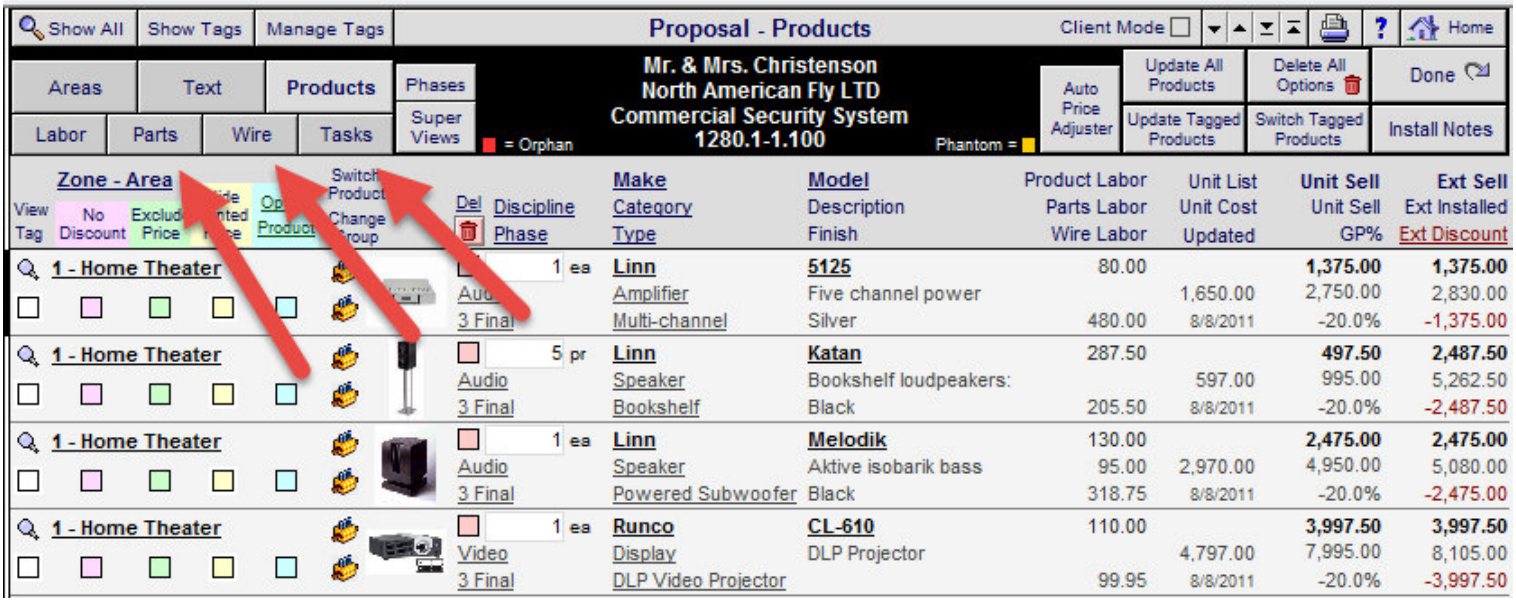
Like Wire Supplements, you can now choose to Not Add Parts Labor to a Proposal, by checking the No Lab box on a Part Supplement attached to a Product in the Product Library



Fix: Supplement Navigation from Proposal Products screens

When navigating to the Parts, Wire and Task supplements from the Proposal Products screen, you were directed to a different Proposal or Project.

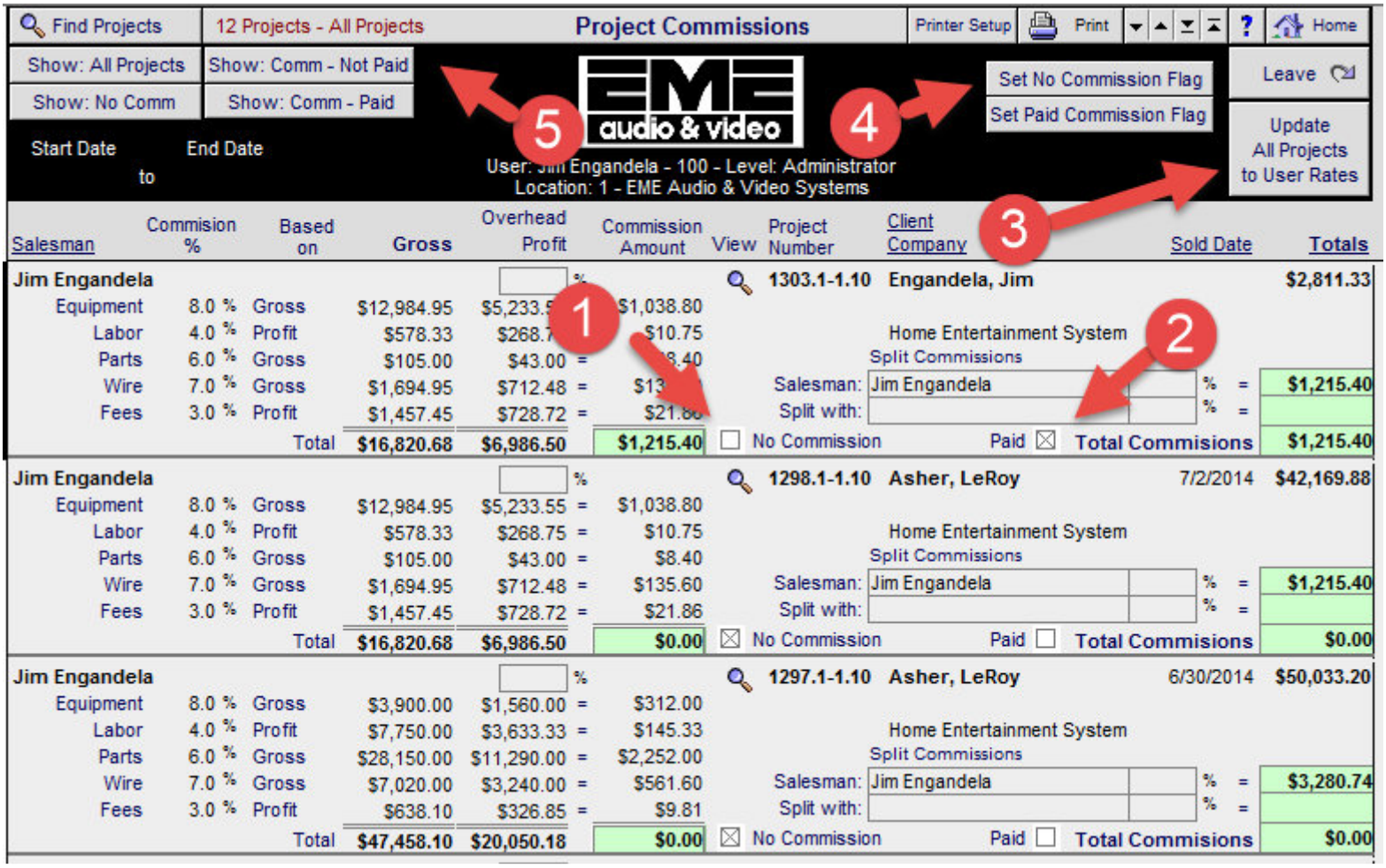
This has been corrected.



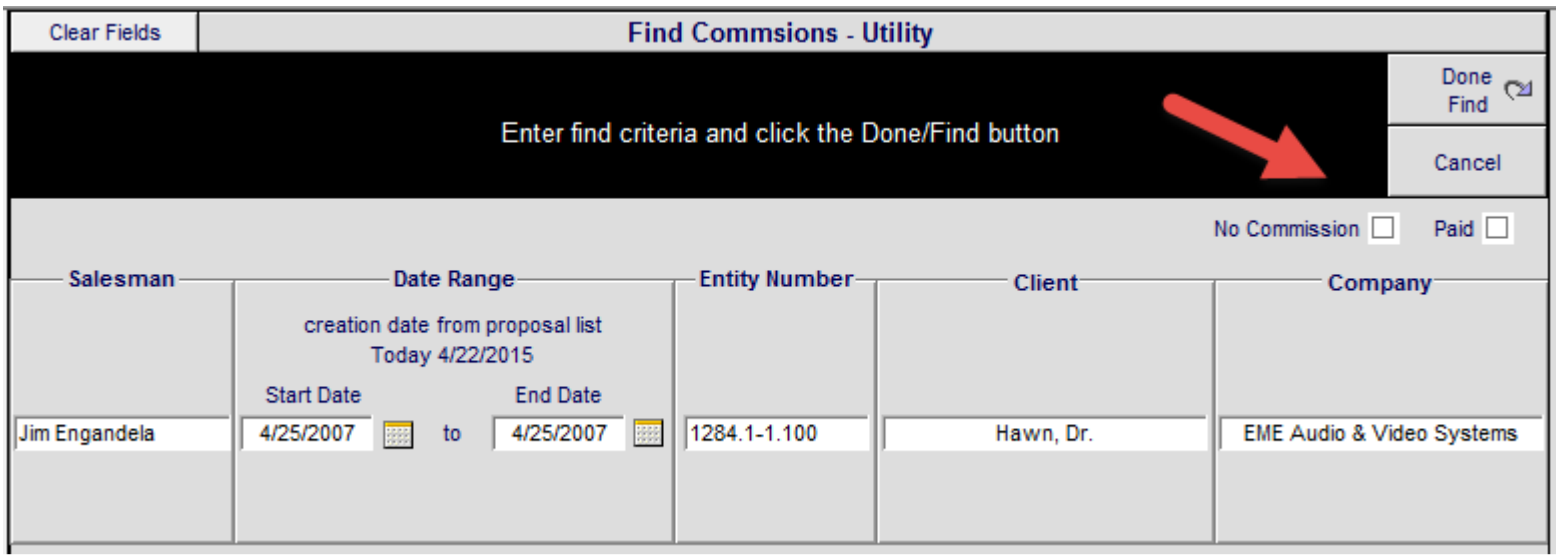
SCPS 11.8v3 Upgrade
New Features, Enhancements and Fixes
5-5-2015

Enhancement: Project Manager/Commissions: Improve Speed and Functionality

1. Checking the "No Commission" box will remove the commission amount from that Project.
2. Checking the "Paid" box will remove this Project from the search criteria.
3. When Updating the Projects to the Master Preferences-User Commission Rates, you now can choose to Update All Projects or only the Projects showing in the List.
4. Clicking the Set No Commission Flag or Paid Flag will check or uncheck all of boxes showing in the List. Find the Projects you want prior to using these.
5. A number of Find buttons based on different criteria are now available and the number of Projects and Find Criteria is displayed in the header.

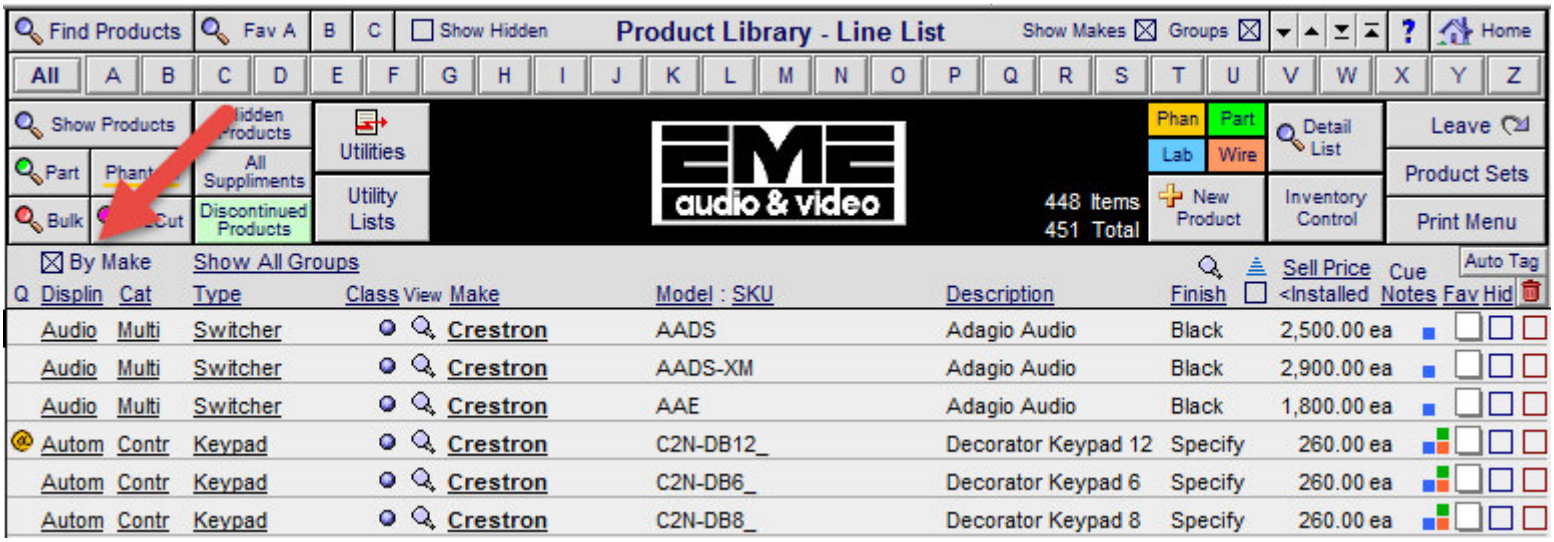


The Find Projects has been redesigned to make it easier to select the desired Find criteria. You can also check the "No Commission" or " Paid" check boxes to filter the search.



Enhancement: Product Library: Incorporate Showing Products by Make Option into Header

If you check the "By Make" box, when you click an underlined Discipline in the Product List, you will get all of the Products in that Discipline, but only for the Make of the Product you clicked on and not All Makes for that Discipline.



Enhancement: Product Library: Display Quantity On Hand icon and Product Info pop up

If you use the SCPS Inventory Module and there is a Quantity on Hand for a Product, an Icon will appear on that Product. If you click on the Icon you will get a pop up with the Quantity on Hand and other details for that Product.

Find Products | Fav A | B | C | Show Hidden | **Product Library - Line List** | Show Makes | Groups | 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 | Utilities | Part | Phantom | All Suppliments | Utility Lists | Bulk | PreCut | Discontinued Products

EME audio & video

448 Items
451 Total

Phan | Part | Lab | Wire | New Product | Detail List | Inventory Control | Leave | Product Sets | Print Menu

By Make | Show All Groups | Auto Tag

Q	Displin	Cat	Type	Class	View	Make	Model : SKU	Description	Finish	Sell Price <Installed	Cue Notes	Fav	Hid
	Audio	Multi	Switcher			Crestron	AADS	Adagio Audio	Black	2,500.00 ea			
	Audio	Multi	Switcher			Crestron	AADS-XM	Adagio Audio	Black	2,900.00 ea			
	Audio	Multi	Switcher			Crestron	AAE	Adagio Audio	Black	1,800.00 ea			
	Autom	Contr	Keypad			Crestron	C2N-DB12_	Decorator Keypad 12	Specify	260.00 ea			
	Autom	Contr	Keypad			Crestron	C2N-DB6_	Decorator Keypad 6	Specify	260.00 ea			
	Autom	Contr	Keypad			Crestron	C2N-DB8	Decorator Keypad 8	Specify	260.00 ea			
	Audio	Ampli	Multi-channel							00 ea			
	Audio	Ampli	Multi-channel							00 ea		A	
	Audio	Ampli	Multi-channel							00 ea			
	Audio	Ampli	Multi-channel							00 ea			
	Autom	Contr	Keypad							00 ea			
	Autom	Contr	Keypad							00 ea			
	Autom	Contr	Keypad							00 ea			
	Autom	Contr	Keypad							00 ea			
	Autom	Contr	Keypad							00 ea			
	Audio	Multi	Switcher							00 ea			
	Audio	Ampli	Multi-channel							00 ea			
	Wire	Pre-C	Interconnect							00 ea			
	Video	DSS	DSS Receiver							00 ea			
	Video	DSS	DSS Receiver							00 ea			

Qty On Hand (expand window to show prices)

Qty on Hand: 4

Crestron
C2N-DB12_
Decorator Keypad 12 Button Specify

Product: $260.00 ea - GP: 50%
Parts: $105.00
Wire: $48.00
Labor: $155.00
==========
Total Installed Price: $568.00 ea

Date Modified: 4/11/2015

OK

Find Products | Replace Data | **Product Library - Product Detail** | 4 of 448 | ? | Home

Update Supplements | Delete Product

Created: 1/20/2006
Sell Updated: 8/8/2011
Cost Updated: 8/8/2011
Product is Not in a Proposal/Project

Crestron
C2N-DB12_
Decorator Keypad 12 Button
Automation : Control : Keypad

New Product | Duplicate Product | Done | Prev | Next

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

Make Crestron
Model C2N-DB12 ?
SKU
Finish Specify
Description Decorator Keypad 12 Button

Sell Price $260.00 ea

Features
Do not exceed text boxes
Decora, 12 Buttons, Touch Settable ID (TSID)
Available Models: A-Almond, B-Black, W-White

Cue Notes

Group
Automation : Control : Keypad
Class: Product
Phase: 2 Trim

Status
Favorite | Tax A: T | Tax B: T | Phantom Product ? | QB Fee SKU

Options

Product		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	☐ ?

Product

Unit: ea

	Net Price	Loading			Loaded Price	
List		Adjustment Type	%			
Sell	$260.00				Sell	$260.00
Minimum Sell		GP	%	$	Cost	$130.00
Net Cost	$130.00				GP%	50.0%

Purchasing
Add POS PO
Default PO Vendor: Crestron Electronics, Inc ?
Default PO Cost: $130.00
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	$260.00	$105.00	$48.00	Sell	$413.00
Labor	$100.00	$25.00	$30.00	Labor	$155.00
Total	$360.00	$130.00	$78.00	Total	$568.00
				GP%	49.0%

View Product, Parts, Wire & Labor Costs

Package Option ? Enable ☐ | Global Buy Pkg Off
Buy Pkg
Buy Pkg Qty ea
Buy Pkg Cost
Set Cost

Inventory

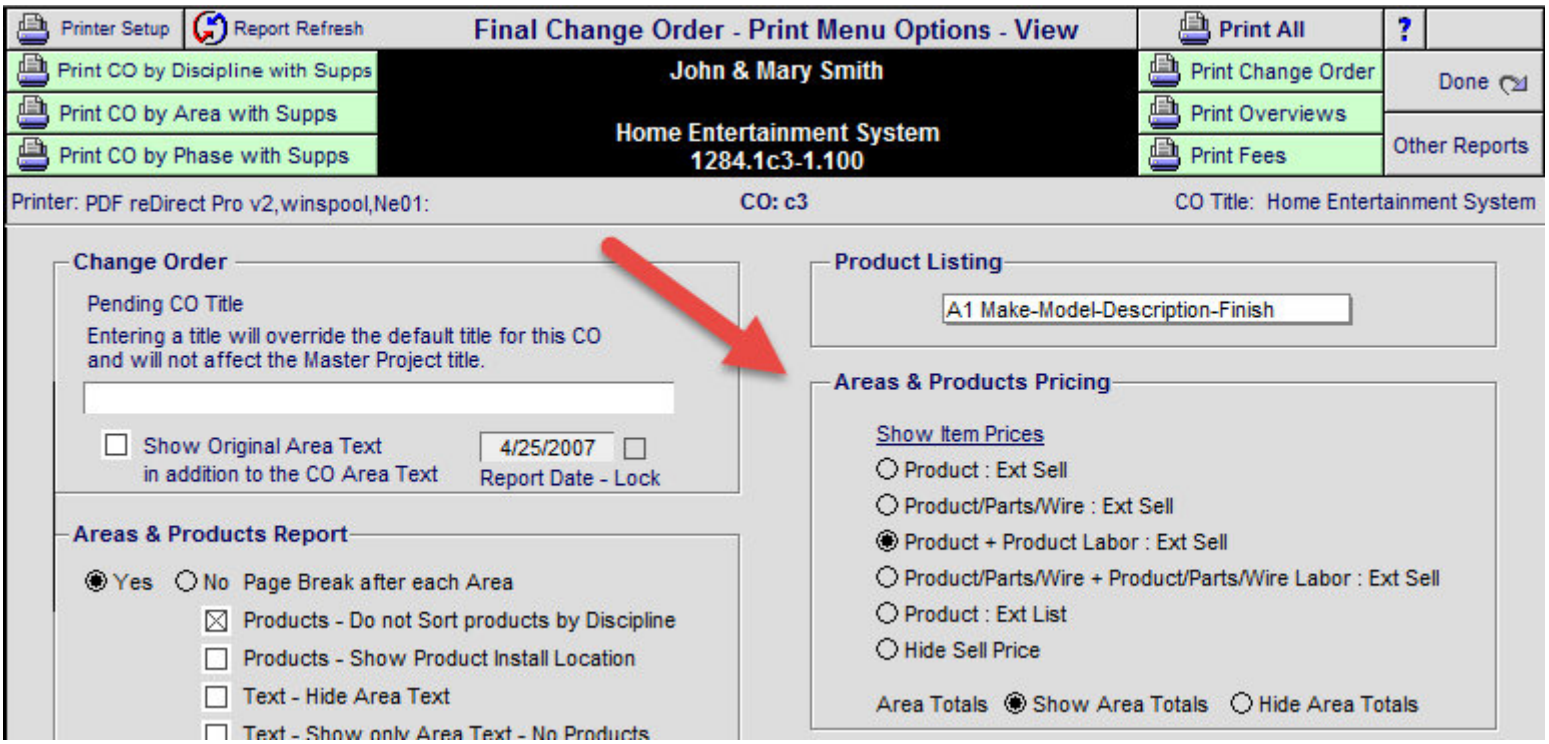
Delivery Lead Time: 7 Days

	@	Qty	Cost Value
Quantity On-Hand		4	$520.00
Optimum Qty			
Order Qty		0	

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

Enhancement: Final CO, Print Menu: Allow Modification of Print Preferences

You now can change the Areas and Products Pricing Option on Final Change Orders. If they are different than the Master Project settings, they will be changed to the Master Project setting when you go to the Print Menu in the Master Project. This ensures that the Final Changer Order Products that appear on the Master Project reports behave consistently with the Master Project settings.

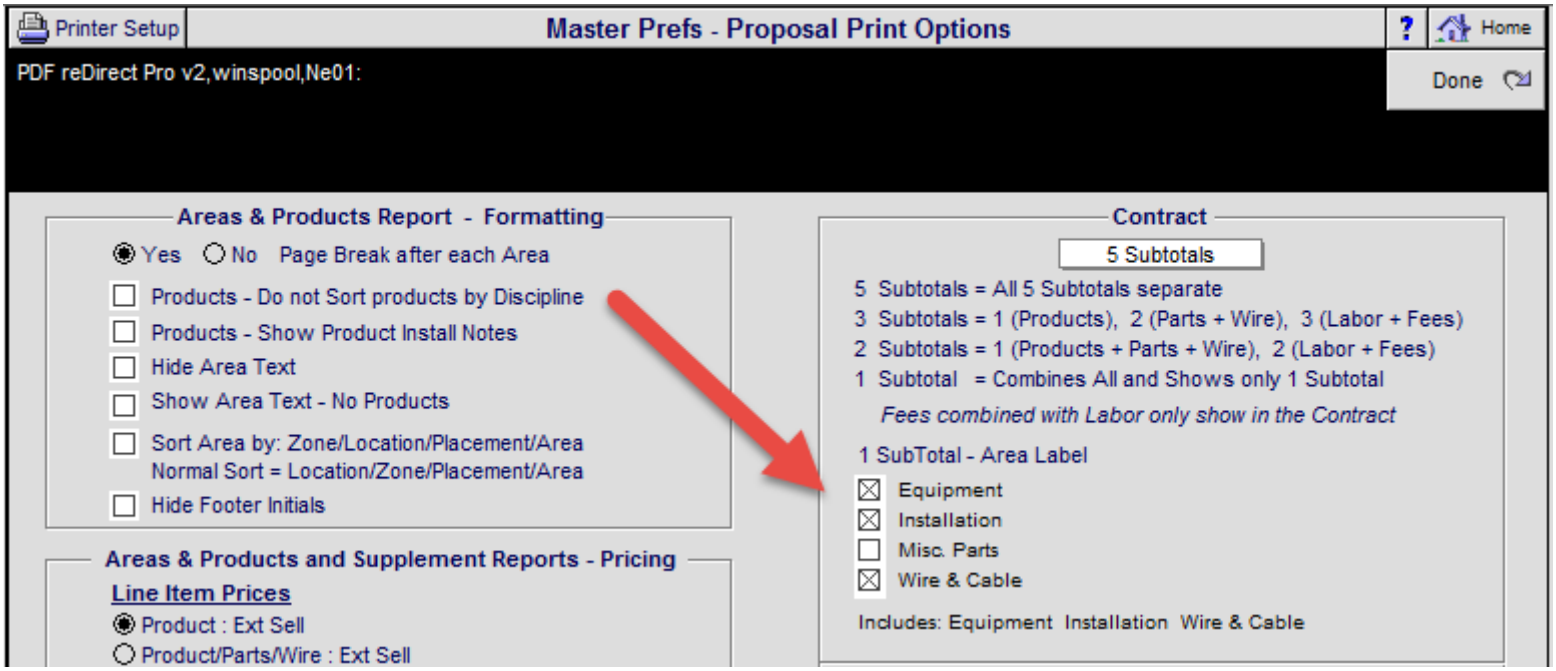


SCPS 11.8v2 Upgrade
New Features, Enhancements and Fixes
5-5-2015

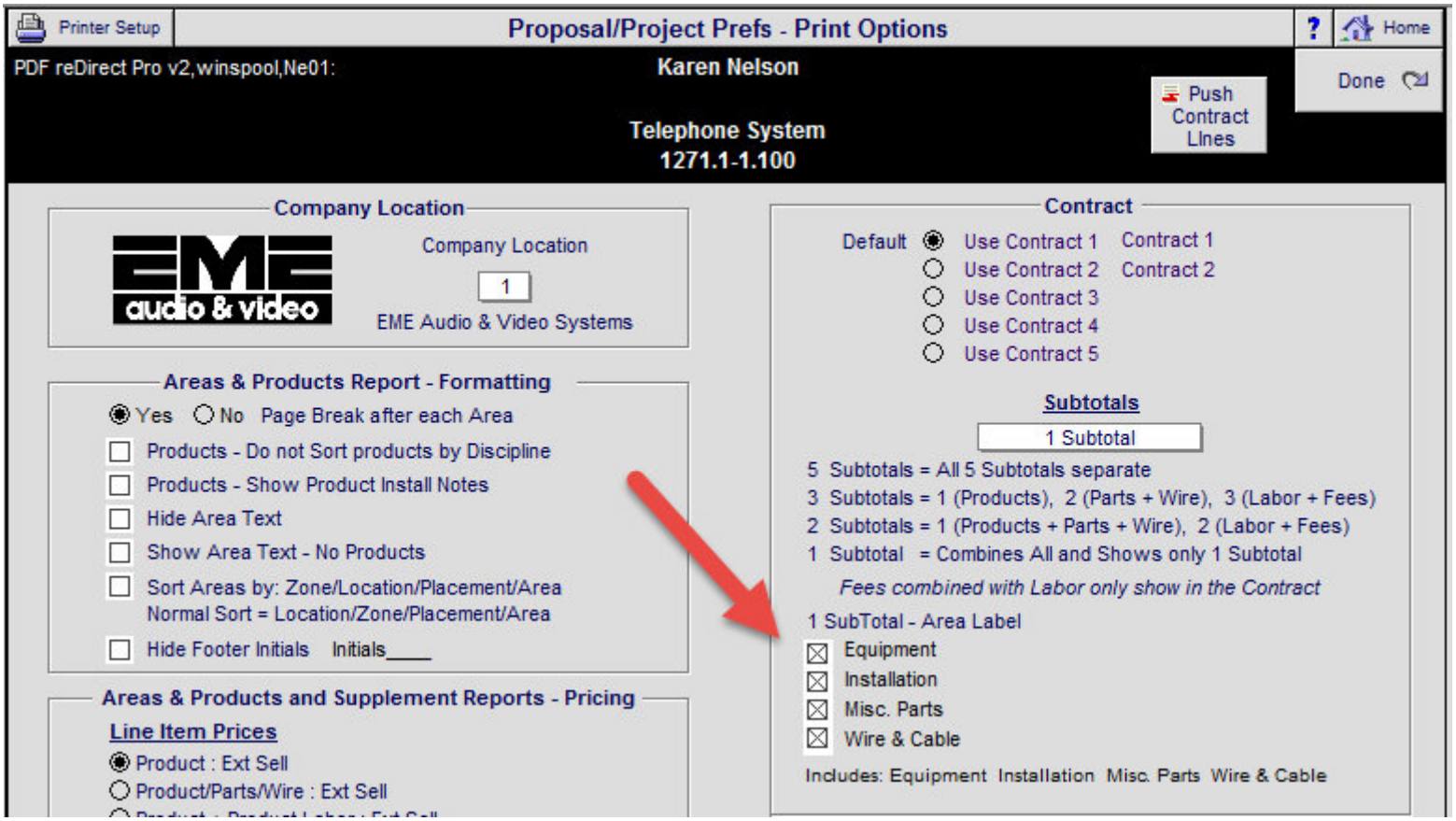
Enhancement: Proposal/Print Menu: 1 Subtotal - Area Label Options

Users can change the 1 Subtotal - Area Label by checking the Label subtotals. This Option can be set in Master Prefs/Proposals/Print Options and in Proposals/Print Menu/Print Options for specific Proposals. Un-Checking all of boxes completely removes the Area Label from all reports.

Master Prefs/Proposal Print Options



Proposal/Print Options



Area 1 Subtotal display

Zone 2 - Living Room

Home music systems require careful design and installation to achieve their maximum hi-fidelity potential. music is the communication of emotion. a great stereo must sound pleasant and be emotionally involving. to achieve this care must be taken in matching and tuning each component so that the whole system will perform in harmony with the music. frequency response, sound pressure levels, imagery, tonal balance and distortion are a few of the parameters that are taken into consideration and adjusted for maximum performance.

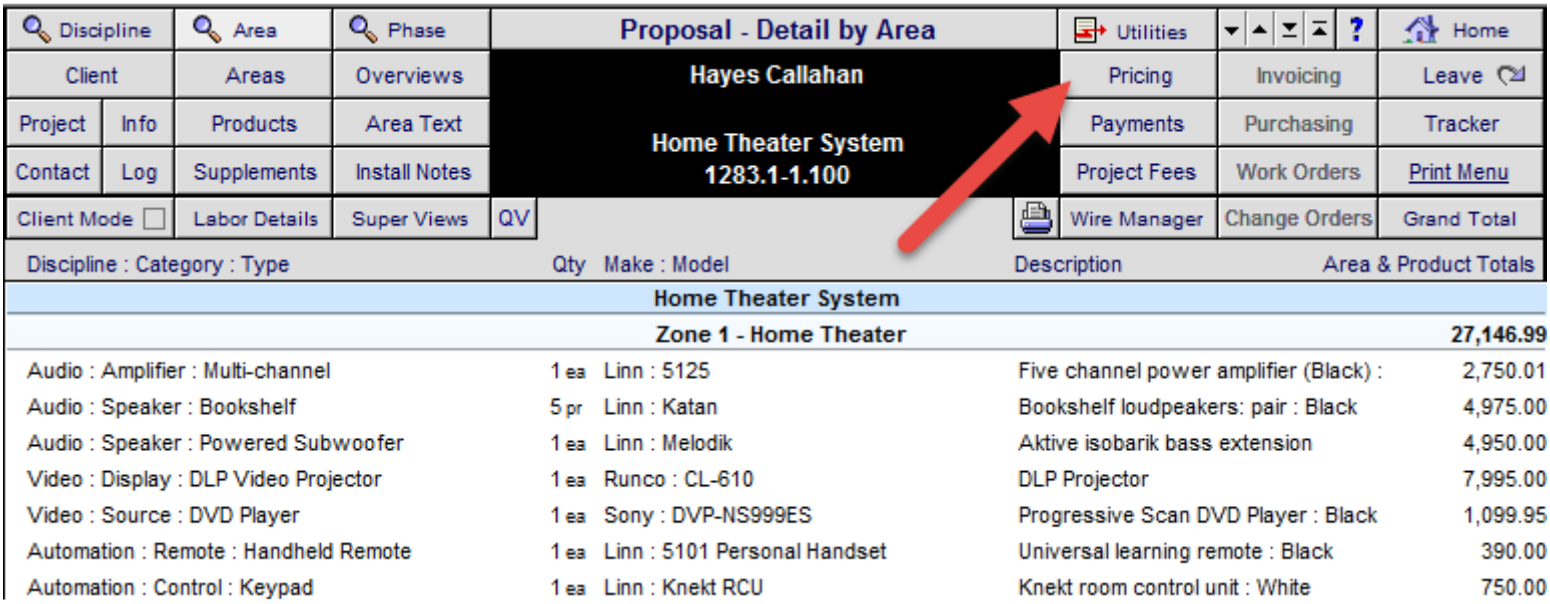
	Qty	Ext. Price
Audio		
Linn : Classik Movie Di : Integrated multi-channel DVD-CD player/tuner/preamp/power amplifiers : Black	1 ea	$5,193.50
Klipsch : RS-7 : Reference Surround Speaker : Matte Black	2 ea	$1,170.00
Klipsch : RC-35 : Center Channel Speaker : Black Ash	1 ea	$518.70
Kl[illegible]h : RF-35 : Reference Tower Speaker : Black Ash	2 ea	$1,297.40
Linn : N[illegible] : Floor-standing loudpeakers: pair : Black	1 pr	$2,405.00
Klipsch : RSW-[illegible] Reference Subwoofer : Black Ash	1 ea	$1,300.00
Zone 2 - Living Room		**$15,176.35**

Includes: Equipment, Installation, Misc. Parts, Wire & Cable

SCPS 11.8v1 Upgrade
New Features, Enhancements and Fixes
4-6-2015

Enhancement: Proposal/Pricing: Pricing Adjuster to compensate for rounding

You can now add or subtract from the Proposal Subtotal and Grand Total to compensate for the rounding that sometimes occurs.



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

Done

Pricing	Labor	Commissions
Tax Summary	Product Tax	Fees Tax

Home Theater System
1283.1-1.100

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	$22,909.96	40.2%	$13,706.40	$9,203.56	-$100.00	15:20:00
	Installation	$995.83	45.9%	$538.33	$457.50		
	Misc. Parts	$200.00	40.5%	$119.00	$81.00		
	Wire & Cable	$3,041.20	41.2%	$1,788.72	$1,252.48		
	Additional Fees	$2,006.61	50.0%	$1,003.30	$1,003.30		
Adjust Total Prices 0.00	Total	$29,153.60	41.2%	$17,155.76	$11,997.84		
	Tax	$1,493.08					
-0.01	Grand Total	$30,646.68					

$29,253.60 List Price
-$100.00 Courtesy Discount
$29,153.60 Total

Proposal Equipment - Price Adjuster

Client Mode ☐ **Proposal - Price Adjustment** ? | Home

Done

Home Theater System
1283.1-1.100

Proposal - Pricing

		Subtotals	Sell	Adjustments		
		Equipment	$22,909.96			
		Installation	$995.83			
		Misc. Parts	$200.00			
		Wire & Cable	$3,041.20			
		Additional Fees	$2,006.61			
Total	$29,153.60	$29,153.60	$29,153.60	0.00	+ -	Clear
Tax	1,493.08	1,493.08	$1,493.08			
Grand Total	$30,646.68	$30,646.68	$30,646.68	-0.01	+ -	Clear
	Contract Post	Calculated	Posted			

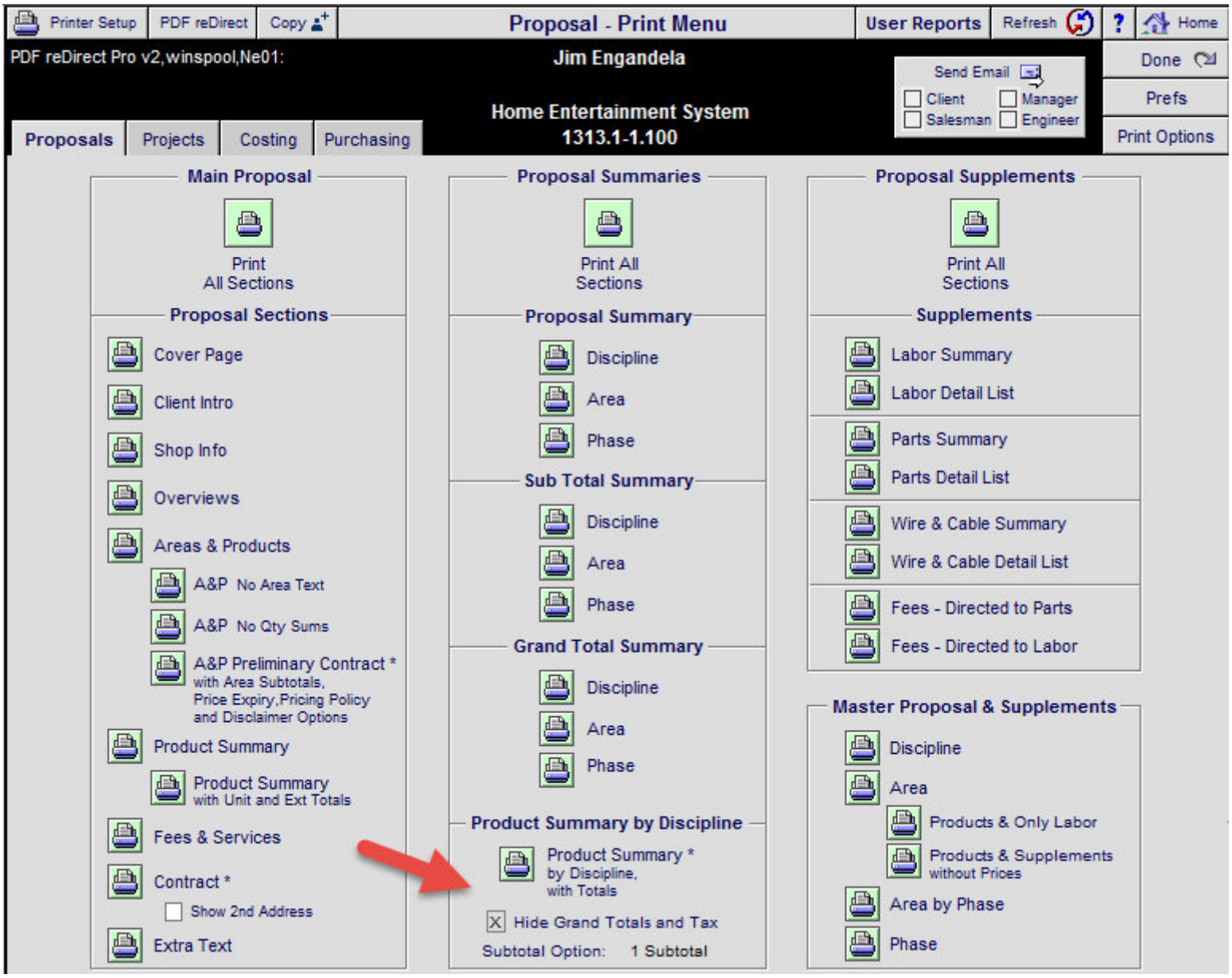
Clear All Adjustments

Important!
Please make sure the Subtotals and Grand Totals Add up properly

Enhancement: Proposal/Print Menu: Product Summary Report 1-2-3-5 Subtotals

When you set the Print Options to show 1, 2, 3 or 5 Subtotals the Product Summary Report now shows those Subtotal settings.

Currently the 1 and 5 subtotals work and the 2 and 3 subtotals are under development.



Enhancement: Proposal/Pricing Menu/Print Options: 1 Area Subtotal Label

When selecting the 1 Subtotal Option, a Label indicating that the Single Area Subtotal Includes Equipment, Installation Parts and Wires will appear next to the Area Subtotal on Proposal Reports.
The label is based on your Subtotal Labels.

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

PDF reDirect Pro v2,winspool,Ne01:

Jim Engandela

Home Entertainment System
1313.1-1.100

Push Contract Lines

Done

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____

Contract

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

Subtotals

1 Subtotal

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

1 Area SubTotal Label
Includes: Equipment, Installation, Misc. Parts, Wire & Cable

Home Entertainment System
for Jim Engandela

EME audio & video

Areas & Products

Attic

This area includes the following products and features.

Dual telephone jacks will be provided. these jacks will be connected directly to the main terminal block and consist of 8 conductors each. these dual jacks will enable expandability for future video distribution.

A quality front projection tv will have a clear and realistic picture. flesh tones and color quality will be natural and easy to view for long periods of time. image depth of field and spaciousness will draw the viewers attention into the picture for maximum involvement.

A quality front projection tv will have a clear and realistic picture. flesh tones and color quality will be natural and easy to view for long periods of time. image depth of field and spaciousness will draw the viewers attention into the picture for maximum involvement.

	Qty	Ext. Price
Audio		
Crestron : AADS : Adagio Audio Distribution System : Black *1 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 comp[illegible] console port, LAN: (1) 8-wire RJ45 w/ 2 LED indicators, Net: [illegible] 4-pin 3.5mm detachable terminal blocks, Rooms 1-6: (12) 2-p[illegible] 7.62mm detachable terminal blocks, power amplifier outputs, [illegible] Ant: (2) IEC 169-2 coaxial, AM Ant: (2) 2-pin spring-loaded term[illegible]*	2 ea	$5,000.00
Attic		**$5,090.00**

Includes: Equipment, Installation, Misc. Parts, Wire & Cable

Enhancement: Proposal/Pricing Menu/Areas & Products - No Qty Sums

Occasionally it is desirable to show each "Like Kind" product in the Areas & Products report as a separate Line Item instead of a single line item for "Like Kind" products with a total qty

Printer Setup | PDF reDirect | Copy

Proposal - Print Menu

User Reports | Refresh | ? | Home

PDF reDirect Pro v2,winspool,Ne01:

Jim Engandela

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 No Area Text
  - A&P No Qty Sums
  - 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 by Discipline

- Product Summary * by Discipline, with Totals

[X] Hide Grand Totals and Tax

Subtotal Option: 1 Subtotal

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

Areas & Products

Attic

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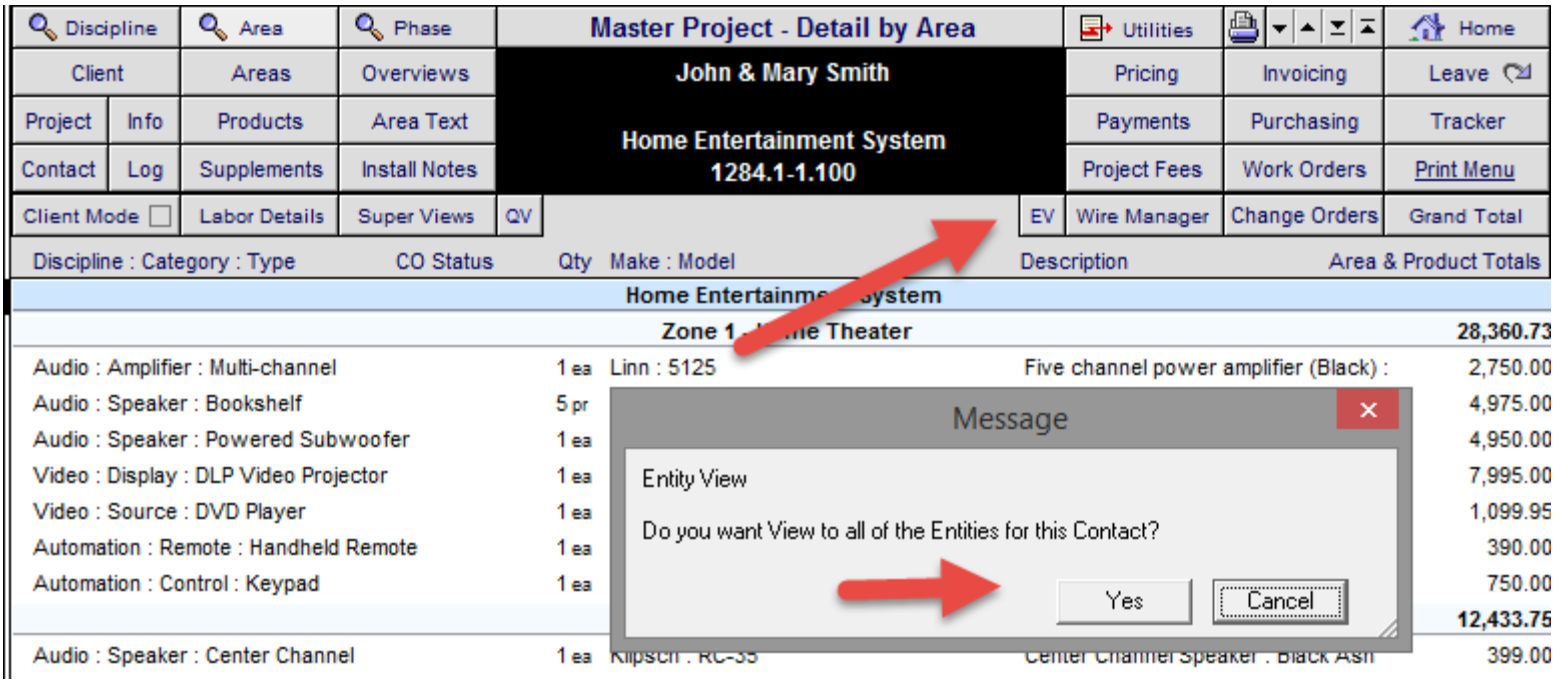
	Qty	Ext. Price
Audio		
Crestron : AADS : Adagio Audio Distribution System : Black *1 Sources 1-4: (16) RCA female, Tuner Out-A: (2) RCA female, Tuner Out-B: (2) RCA female, Net 1-6: (6) 4-pin 3.5mm detachable terminal blocks, IR Out 1-4: (4) 3.5mm TRS mini-phone jack, IR/Serial port, COM A: (1) DB9 male, 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 termnal blocks, power amplifier outputs; FM Ant: (2) IEC 169-2 coaxial, AM Ant: (2) 2-pin spring-loaded terminals*	1 ea	$2,500.00
Crestron : AADS : Adagio Audio Distribution System : Black *1 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 termnal blocks, power amplifier outputs; FM Ant: (2) IEC 169-2 coaxial, AM Ant: (2) 2-pin spring-loaded terminals*	1 ea	$2,500.00
	Attic	**$5,090.00**

Includes: Equipment, Installation, Misc. Parts, Wire & Cable

Enhancement: Proposal/Entities: View Entities from Proposal or Project

You can now View all of the Entities associated with a Proposal or Project by using the EV button (Entity View).

You can then either return to the Entity you came from or pick another Entity or go to the Contact Detail/List screens



Contacts - Entities

Done to Contact Detail

Done to Contact List

John & Mary Smith

Return to Entity

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

View	Entity Kind	Number	User	Title	Created	Sold	Completed	Total	Delete
	Master Project	1284.1-1.100		Home Entertainment System		9/12/2006		$70,407.99	
	Pending CO	1284.1c1-1.100		Home Entertainment System					
	Pending CO	1284.1c2-1.100		Home Entertainment System		3/11/2007		$26,492.37	
	Finalized CO	1284.1c3-1.100		Home Entertainment System		10/22/2007		-$1,427.78	

X = Archived

POS

View	Entity Kind	Number	Created	Total	Remaining Balance	Delete

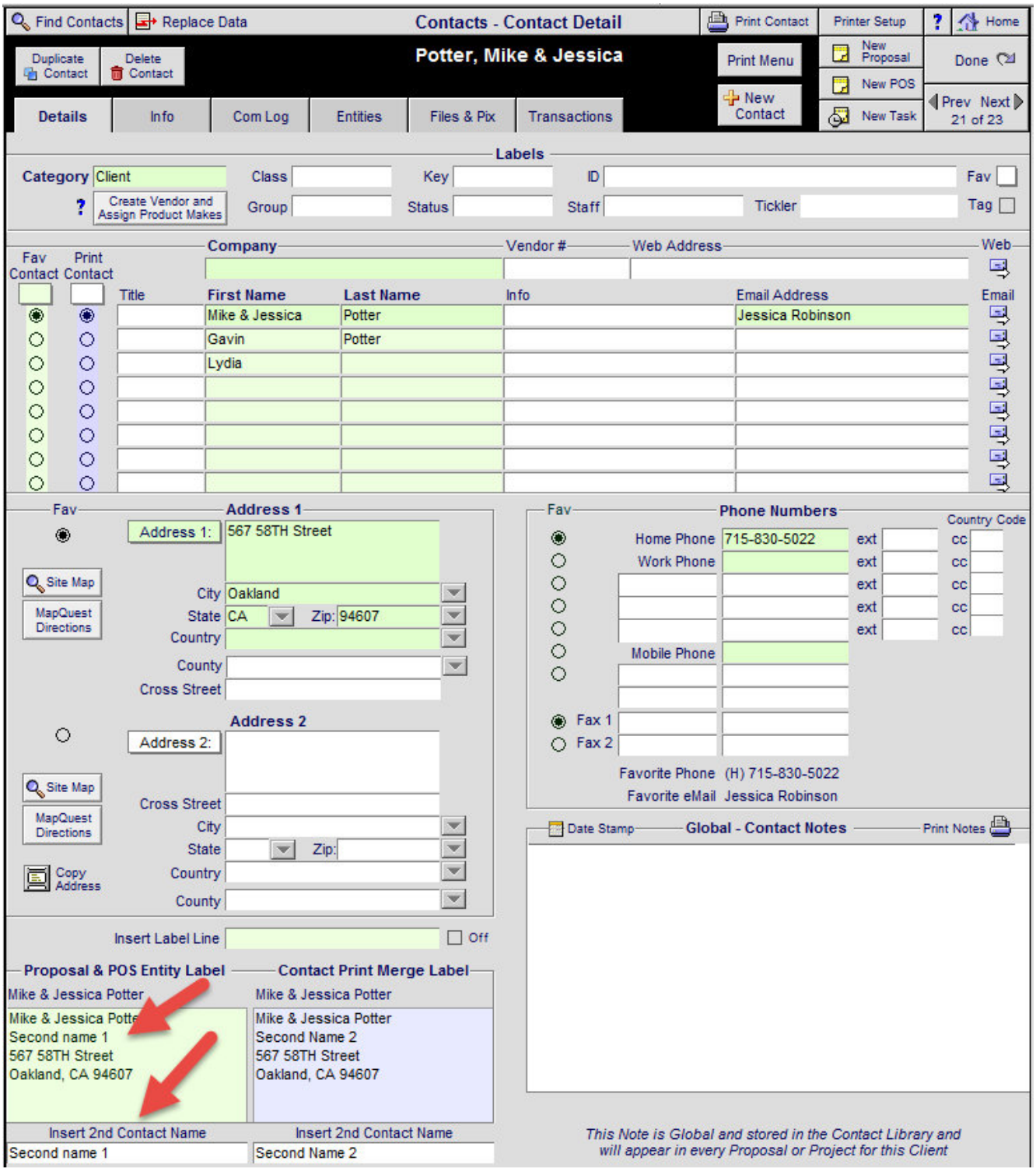
Tracker Task/Appointment

View	Due Date	Tracker Kind	Owner	Delete
	10/13/05	Client Task	Jim Engandela	

Enhancement: Proposal-Contact: Second Client Name

You can now add a second Client name to a Contact and it will appear on the Proposal Cover Page for that Client.

You can also have a second Client name appear on the Contact Mailing Label as well.



Proposal Cover Page

SECURITY SYSTEM

Version 1

Designed and Prepared for

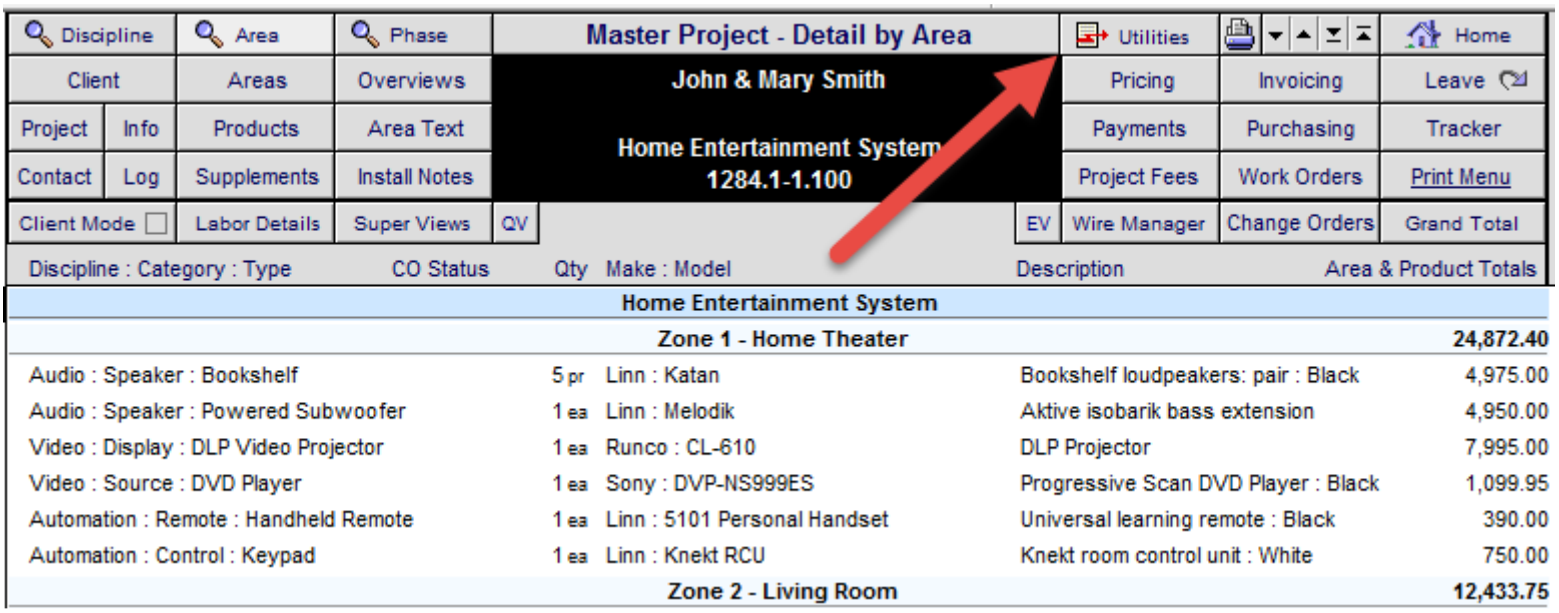
Mike & Jessica Potter
Second name 1
567 58TH Street
Oakland, CA 94607

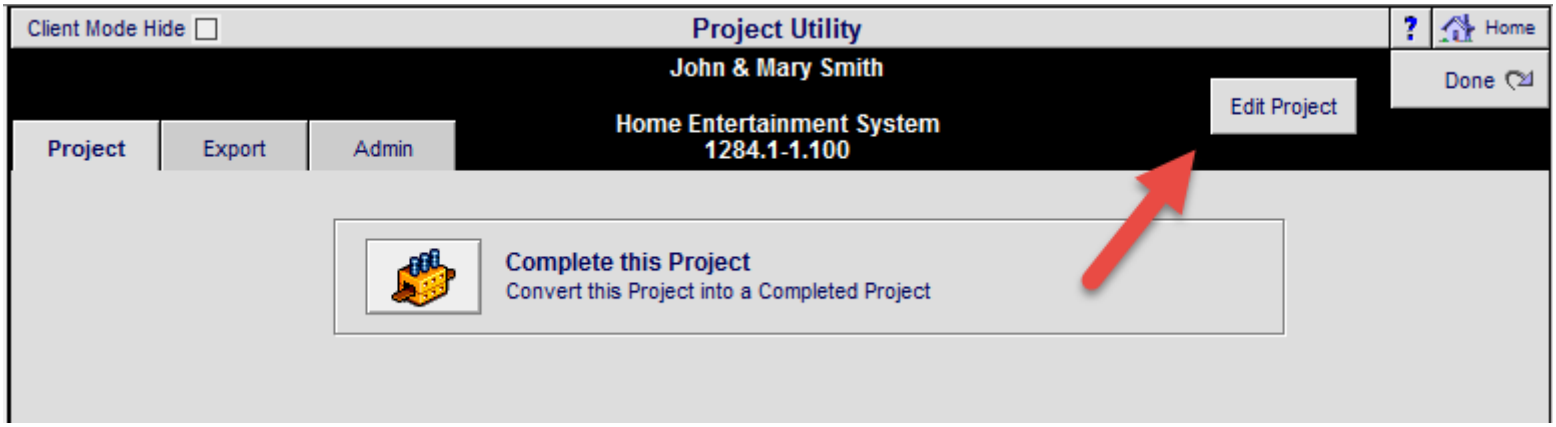
(H) 715-830-5022
Jessica Robinson

Jim Engandela
President

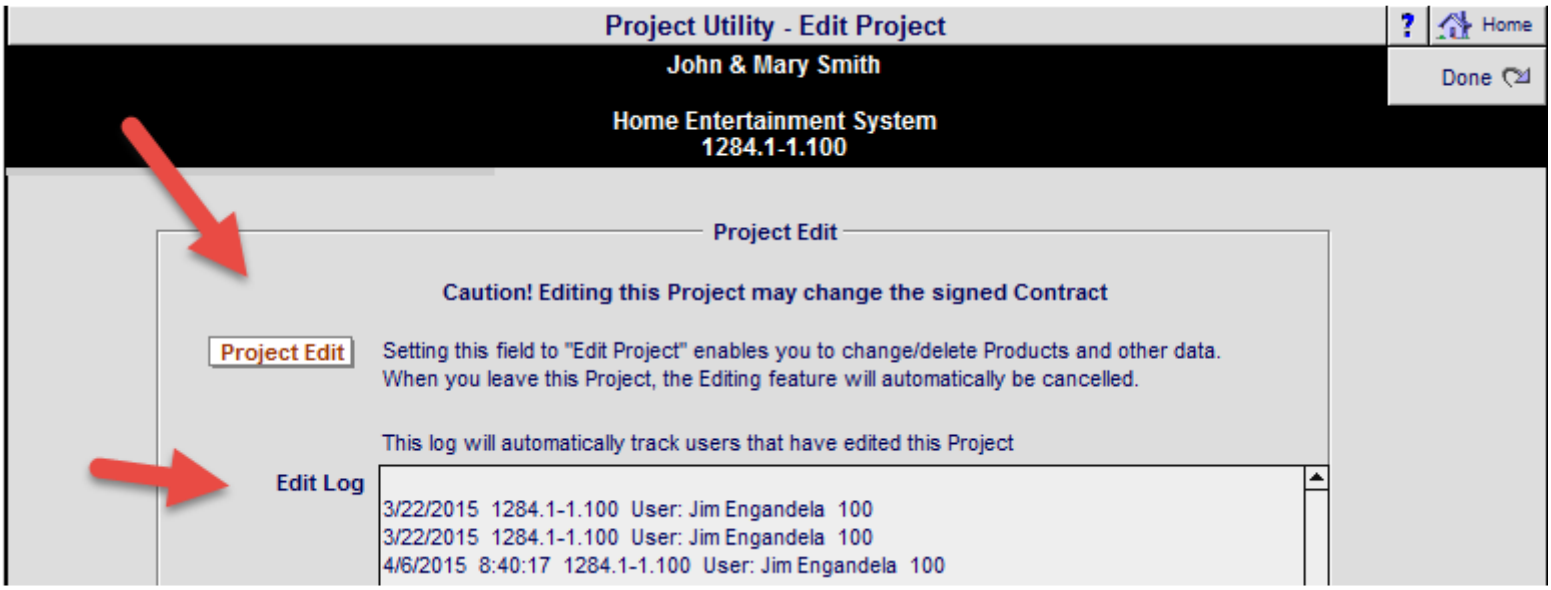
Enhancement: Project: Edit All Screens & Delete Products & Supplements

Projects and Final Change Orders can now be Edited by Administrators with Access Rights

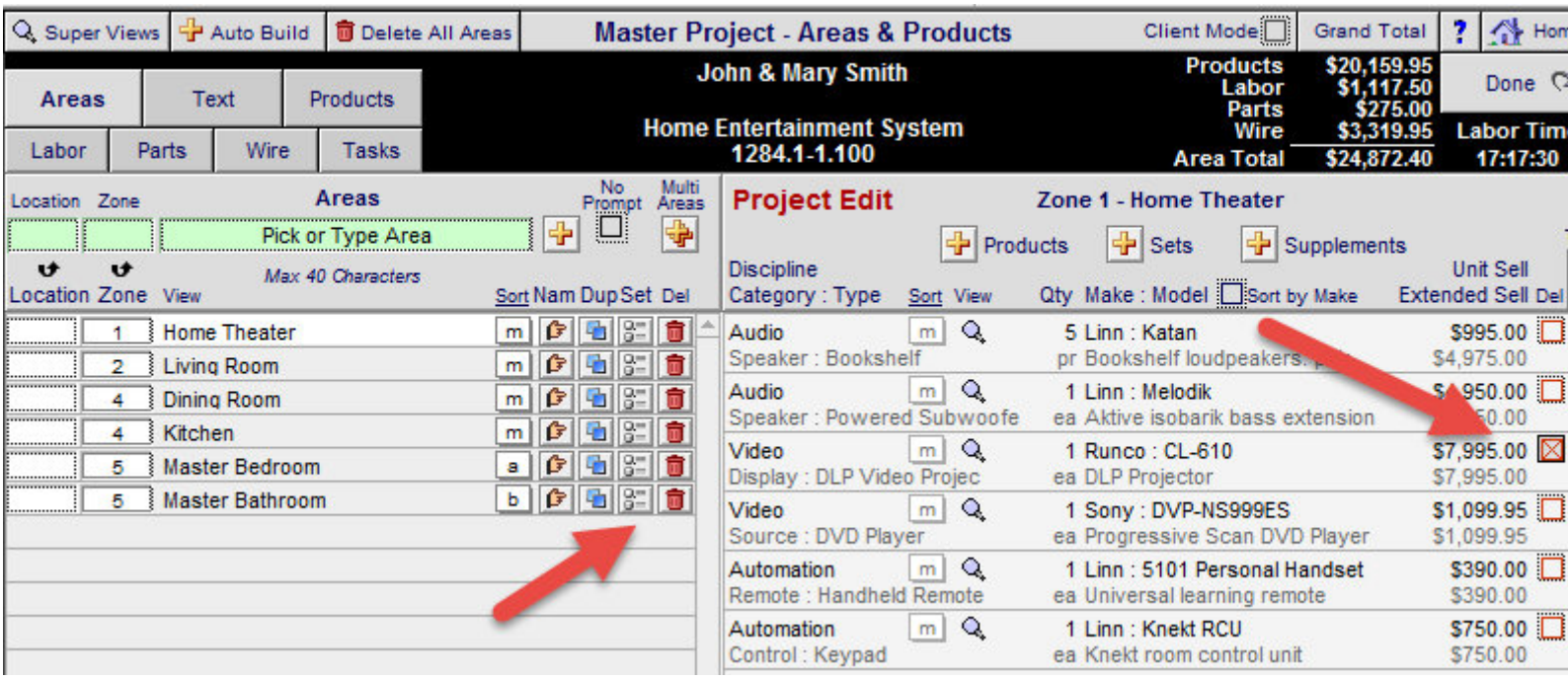


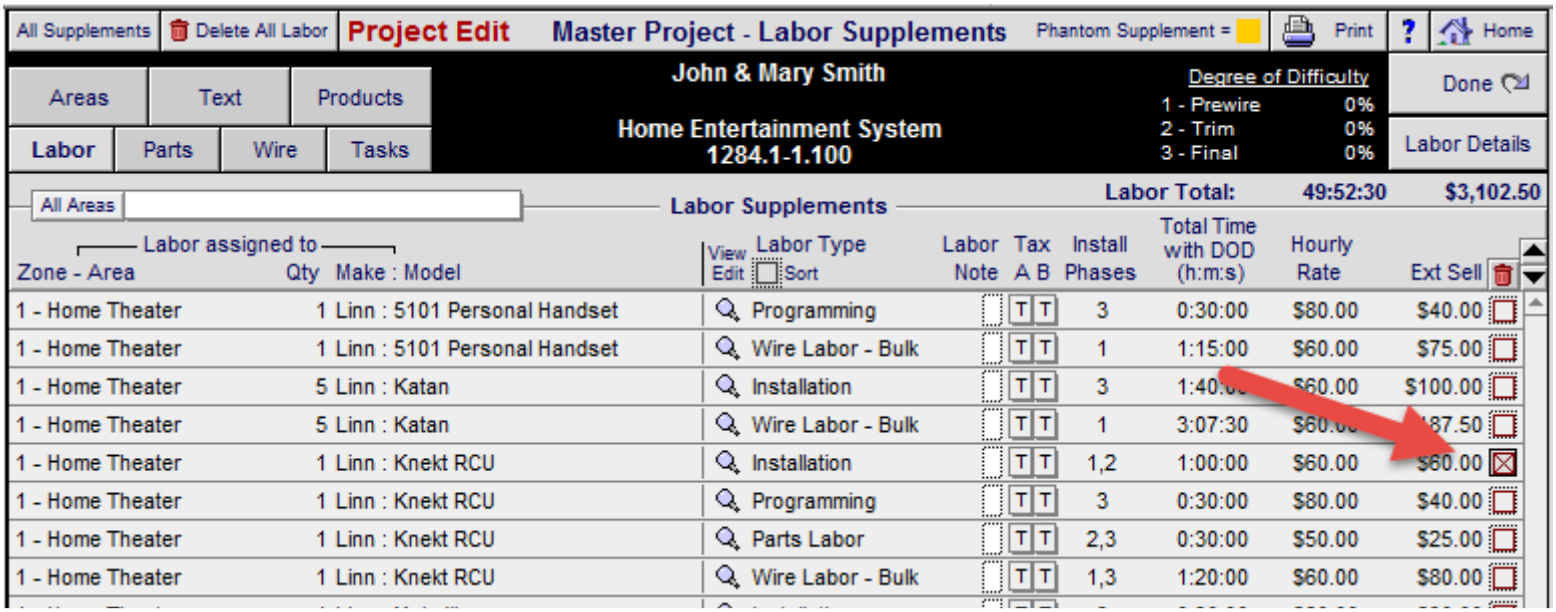


The Edit Mode Log keeps track of Administrators that have Edited a Project or Final Change Order



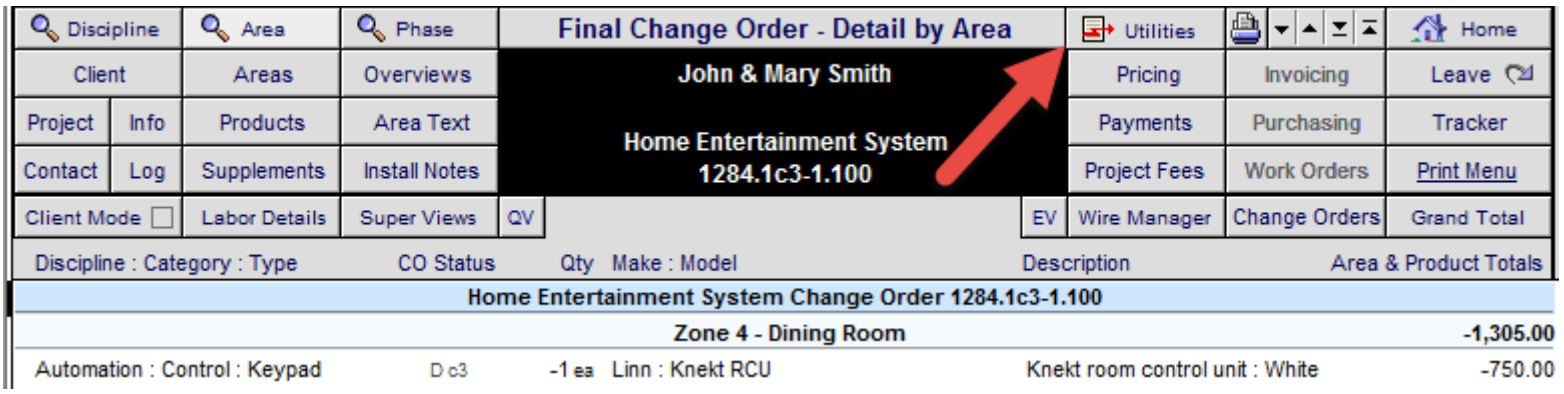
Areas, Products and Supplements can be Added and Deleted in the Project Edit Mode

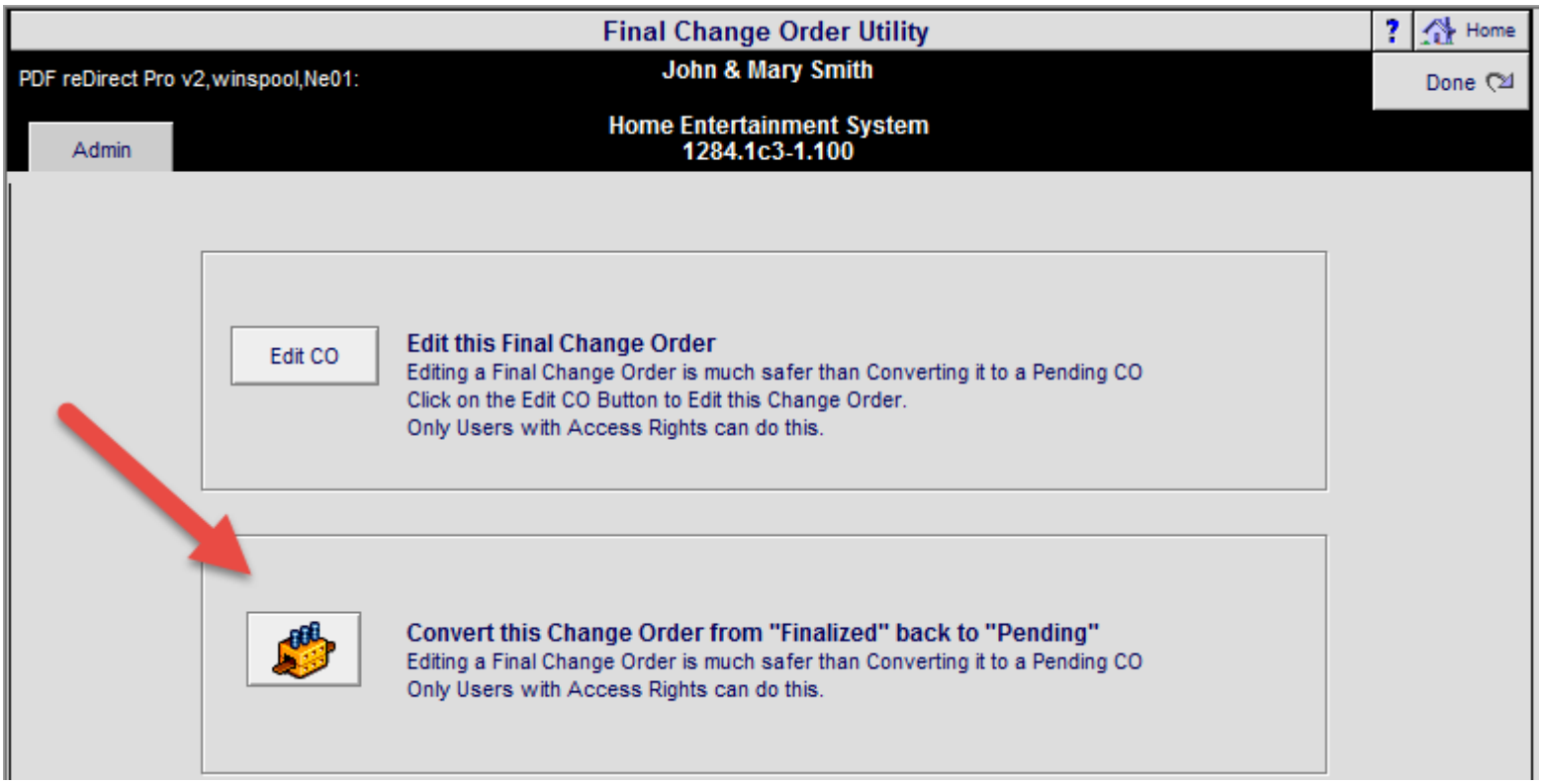




Enhancement: Project/Final Change Orders Converted into Pending Change Orders

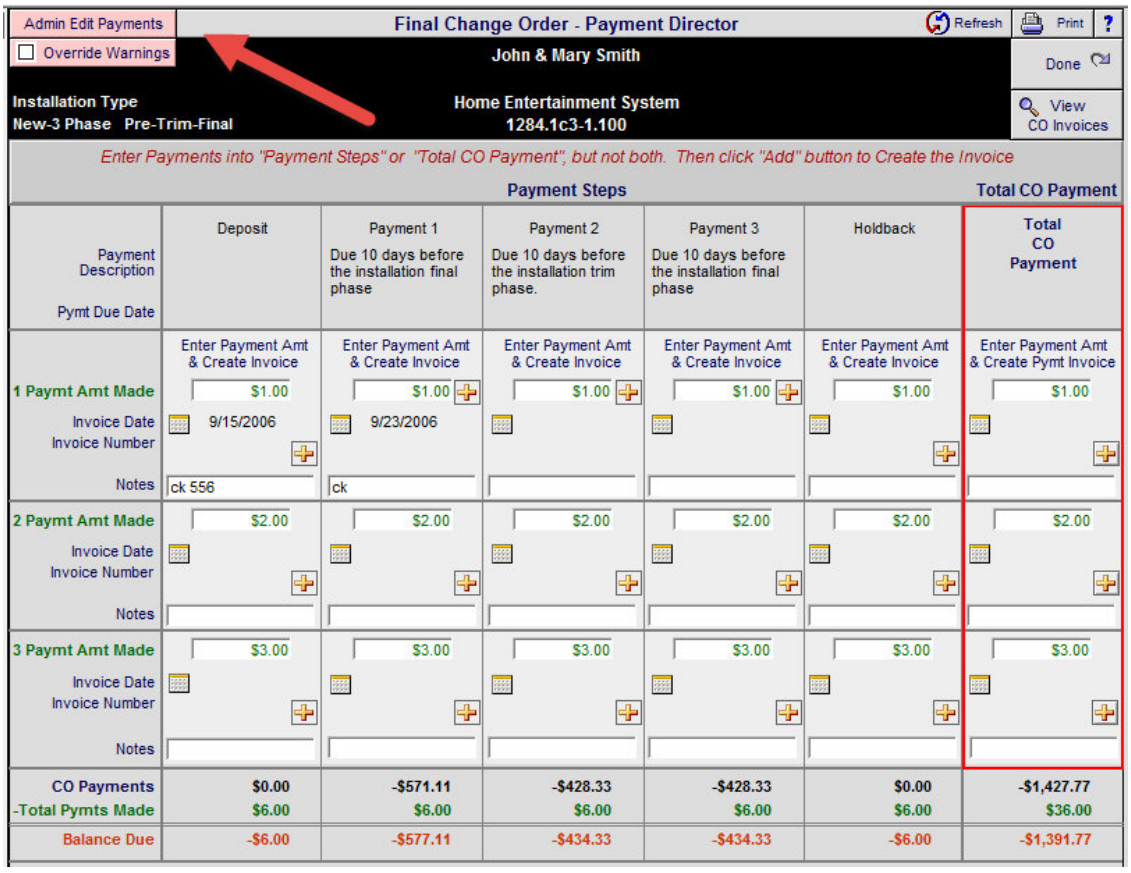
Final Change Orders can now be converted into Pending Change Orders





Enhancement: Project/Final Change Order/Payments: Edit Payments screen

Administrators can now manually edit the Final Change Order Payments, just like they can do with the Project Payments.



Enhancement: Project/Payments: Add 4th Payment row

A 4th Payment row has been added to the Payment screen to help you log in more client payments

Admin Edit Payments | Master Project - Payment Summary | Refresh | Print | ?

Override Warnings | John & Mary Smith | View All CO Payments for this Project | Done

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

Original Project Payments

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

	Deposit	Payment 1	Payment 2	Payment 3	Hold Back	Total Payments
Payment Description	Due when the proposal is accepted and signed.	Due 10 days before the installation prewire phase.	Due 10 days before the installation trim phase.	Due 10 days before the installation prewire phase.	Due at the completion of the installation.	
Pymt Date Due	7/12/2011	7/12/2011	8/11/2011	9/10/2011	9/10/2011	
	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 Paymt Amt Made	$7,055.98	$15,000.00				
Invoice Date	9/15/2006	9/23/2006				
Invoice Number						
Notes	ck 556	ck				
2 Paymt Amt Made						
Invoice Date						
Invoice Number						
Notes						
3 Paymt Amt Made						
Invoice Date						
Invoice Number						
Notes						
4 Paymt Amt Made	$1.00					
Invoice Date						
Invoice Number						
Notes						
Original Project No CO's						
Orig Project Pymts	$7,143.40	$21,430.20	$14,286.80	$21,430.20	$7,143.40	$71,434.00
- Payments Made	$7,056.98	$15,000.00				$22,056.98
Balance Due	$86.42	$6,430.20	$14,286.80	$21,430.20	$7,143.40	$49,377.02
All Final Change Orders						
CO Payments	$0.00	$30,648.62	$22,986.47	$22,986.47	$0.00	$76,621.57
- Payments Made						
Balance Due	$0.00	$30,648.63	$22,986.47	$22,986.47	$0.00	$76,621.57
Master Project Includes Original Project & All CO's						
Master Proj Pymts	$7,143.40	$52,078.82	$37,273.27	$44,416.67	$7,143.40	$148,055.57
- Payments Made	$7,055.98	$15,000.00				$22,056.98
Total Balance Due	$87.42	$37,078.82	$37,273.27	$44,416.67	$7,143.40	$125,998.59

Enhancement: Project Manager/Product History: Add Install Labor and Export Routine

The Unit Install Labor Time for each Product is now displayed and an Export routine added that will create a dbf file that can be opened with Excel or imported into other programs.

Sort All Products | 75 Products | History of Products Sold

Show All Products | Export Products

Click on Underlined Text to Find or Sort Products in Projects, Completed Projects & Final Change Orders. View/Print Report for total Qty of each product

Date Sold	Project	Client/Company	Make	Model	Discipline	Type
9/12/2006	1268.1-1.100	Dana Berkow	Klipsch	RC-35	Audio	Center C
9/12/2006	1284.1-1.100	John & Mary Smith	Klipsch	RC-35	Audio	Center C
9/12/2006	1268.1-1.100	Dana Berkow	Klipsch	RF-35	Audio	Floor
9/12/2006	1284.1-1.100	John & Mary Smith	Klipsch	RF-35	Audio	Floor
9/12/2006	1268.1-1.100	Dana Berkow	Klipsch	RS-7	Audio	Bookshe
9/12/2006	1284.1-1.100	John & Mary Smith	Klipsch	RS-7	Audio	Bookshe
9/12/2006	1268.1-1.100	Dana Berkow	Klipsch	RSW-10	Audio	Powere
9/12/2006	1284.1-1.100	John & Mary Smith	Klipsch	RSW-10	Audio	Powere
9/12/2006	1268.1-1.100	Dana Berkow	Linn	5101 Personal Handset	Automation	Handhel
9/12/2006	1284.1-1.100	John & Mary Smith	Linn	5101 Personal Handset	Automation	Handhel
9/12/2006	1285.1-1.100	Mike & Jessica Potter	Linn	5101 Personal Handset	Automation	Handhel

3/4/2015 | EME Audio & Video Systems - Confidential Report | Page 1

History of Products Sold

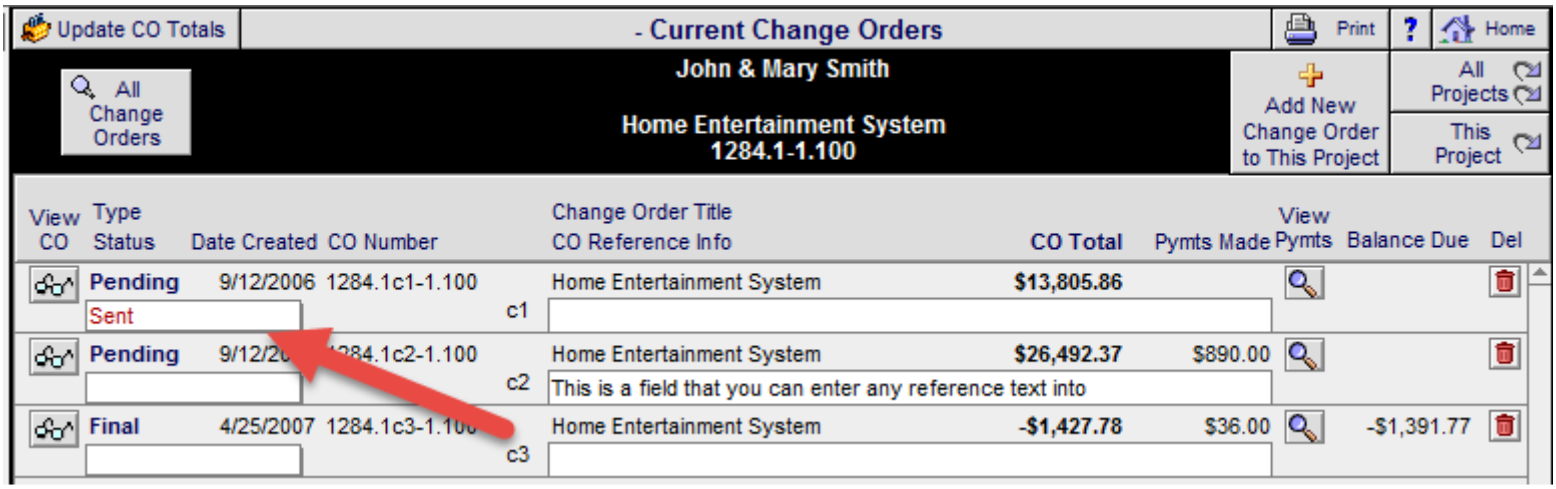
Project	Date Sold	Make	Model	Unit Labor	Qty	Unit Sell Price
1268.1-1.100 Dana Berkow	9/12/2006	Klipsch	RC-35	0:20:00	1 ea	$399.00
1284.1-1.100 John & Mary Smith	9/12/2006	Klipsch	RC-35	0:20:00	1 ea	$399.00
				Total Qty & Price	**2 ea**	**$798.00**
1268.1-1.100 Dana Berkow	9/12/2006	Klipsch	RF-35	2:00:00	2 ea	$499.00
1284.1-1.100 John & Mary Smith	9/12/2006	Klipsch	RF-35	2:00:00	2 ea	$499.00
				Total Qty & Price	**4 ea**	**$1,996.00**
1268.1-1.100 Dana Berkow	9/12/2006	Klipsch	RS-7	0:20:00	2 ea	$450.00
1284.1-1.100 John & Mary Smith	9/12/2006	Klipsch	RS-7	0:20:00	2 ea	$450.00
				Total Qty & Price	**4 ea**	**$1,800.00**
1268.1-1.100 Dana Berkow	9/12/2006	Klipsch	RSW-10	0:30:00	1 ea	$1,000.00
1284.1-1.100 John & Mary Smith	9/12/2006	Klipsch	RSW-10	0:30:00	1 ea	$1,000.00

Exported Product Data imported into Excel

ZL_DATECRE	ZI_PROPFUL	ZI_PROPNAM	PD_MAKE_LO	PD_MODEL_L	PD_DEPT_LO	PD_TYPE	PD_C
9/12/2006	1268.1-1.100	Dana Berkow	Linn	5101 Personal Handset	Automation	Handheld Remote Control	
9/12/2006	1268.1-1.100	Dana Berkow	Linn	5125	Audio	Multi-channel	
9/12/2006	1268.1-1.100	Dana Berkow	Linn	Melodik	Audio	Powered Subwoofer	
9/12/2006	1268.1-1.100	Dana Berkow	Linn	Katan	Audio	Bookshelf	
9/12/2006	1268.1-1.100	Dana Berkow	Linn	Knekt RCU	Automation	Keypad	
9/12/2006	1268.1-1.100	Dana Berkow	Runco	CL-610	Video	DLP Video Projector	
9/12/2006	1268.1-1.100	Dana Berkow	Sony	DVP-NS999ES	Video	DVD Player	
9/12/2006	1268.1-1.100	Dana Berkow	Linn	Classik Movie Di	Audio	Surround Receiver	
9/12/2006	1268.1-1.100	Dana Berkow	Linn	Ninka	Audio	Floor	
9/12/2006	1268.1-1.100	Dana Berkow	Klipsch	RC-35	Audio	Center Channel	
9/12/2006	1268.1-1.100	Dana Berkow	Klipsch	RF-35	Audio	Floor	
9/12/2006	1268.1-1.100	Dana Berkow	Klipsch	RS-7	Audio	Bookshelf	
9/12/2006	1268.1-1.100	Dana Berkow	Klipsch	RSW-10	Audio	Powered Subwoofer	
9/12/2006	1268.1-1.100	Dana Berkow	Linn	Diskreet-Rd	Audio	In-wall	
9/12/2006	1268.1-1.100	Dana Berkow	Linn	Knekt RCU	Automation	Keypad	
9/12/2006	1268.1-1.100	Dana Berkow	Linn	Diskreet-Rd	Audio	In-wall	

Enhancement: Project/Change Orders: Status Flag

A Change Order Status Flag has been added to enable you to show the status of the CO. You can also use the CO Reference field for additional information.

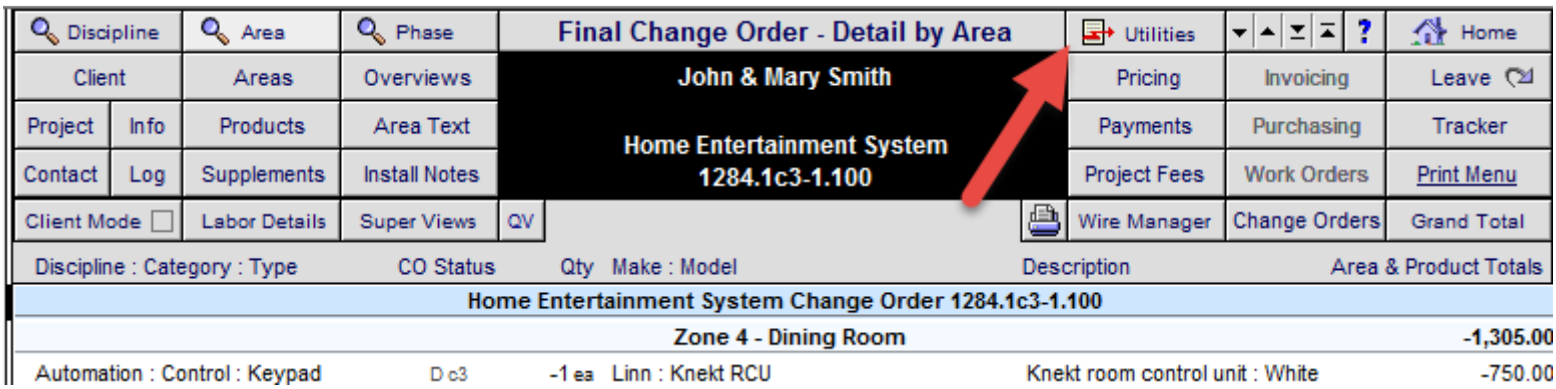


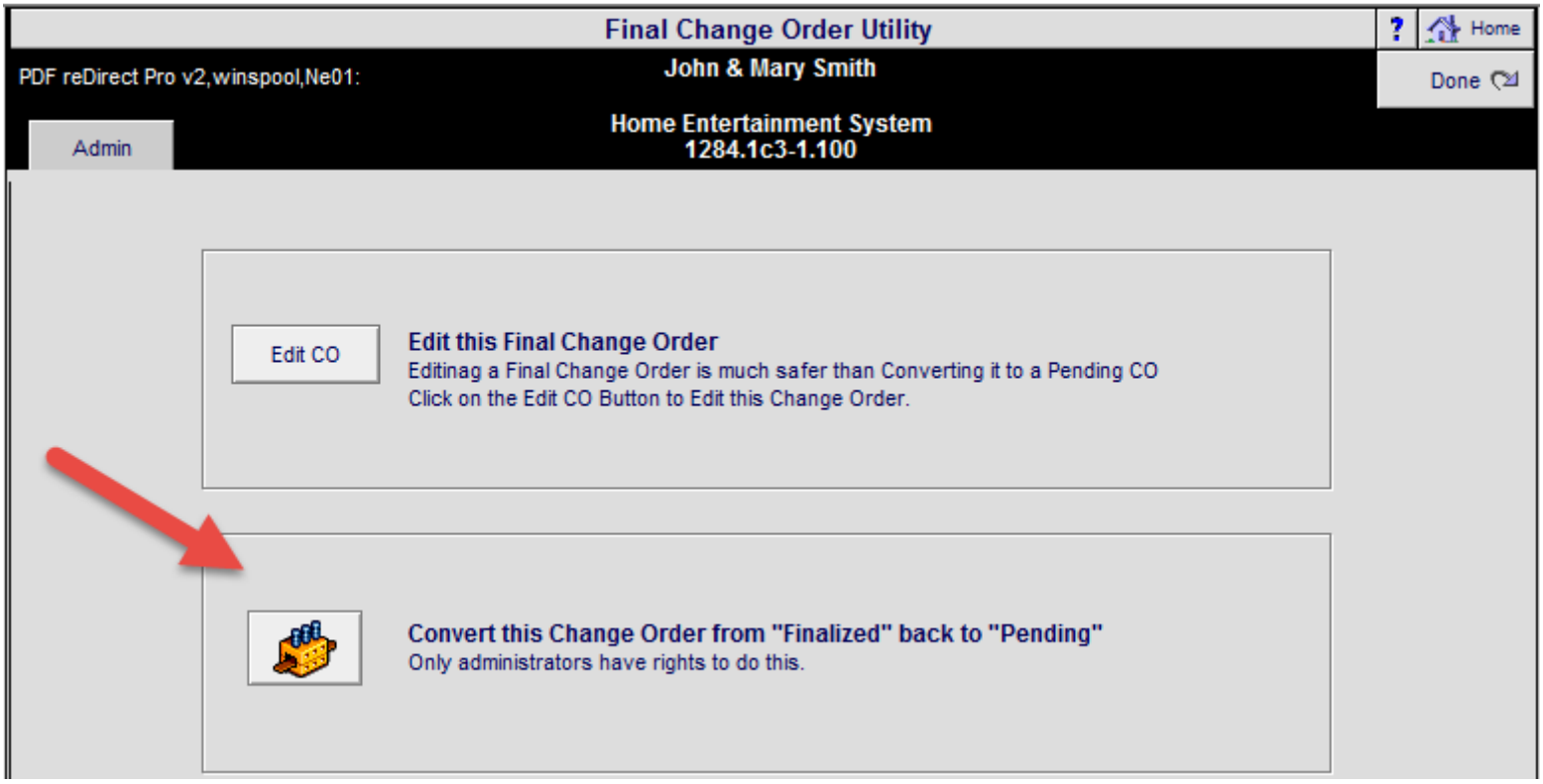
Enhancement: Project/Change Order/Utility: Convert Final CO

In addition to being able to Edit a Final Change Order, you now have the ability to Convert a Final Change Order back to a Pending Change Order.

Users need to have Access Rights to Convert Final CO's.

Access Rights are set in Master Prefs/Users/Access Rights


Discipline
Area
Phase
Final Change Order - Detail by Area
Utilities
Home
Client
Areas
Overviews
John & Mary Smith
Pricing
Invoicing
Leave
Project
Info
Products
Area Text
Payments
Purchasing
Tracker
Home Entertainment System
1284.1c3-1.100
Contact
Log
Supplements
Install Notes
Project Fees
Work Orders
Print Menu
Client Mode
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 Change Order 1284.1c3-1.100
Zone 4 - Dining Room
-1,305.00
Automation : Control : Keypad
D c3
-1 ea
Linn : Knekt RCU
Knekt room control unit : White
-750.00

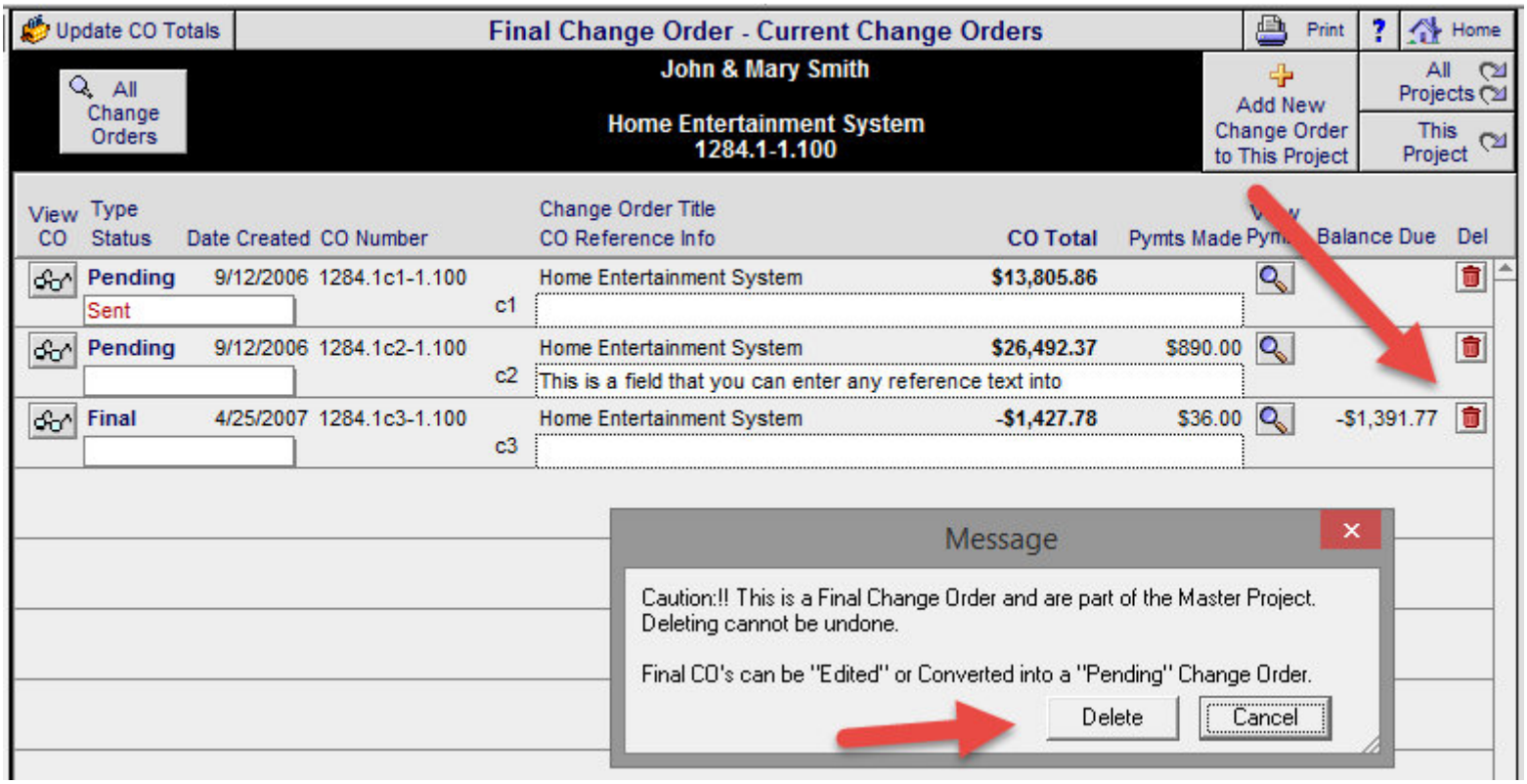

Final Change Order Utility
Home
PDF reDirect Pro v2,winspool,Ne01:
John & Mary Smith
Done
Admin
Home Entertainment System
1284.1c3-1.100
Edit CO
Edit this Final Change Order
Editinag a Final Change Order is much safer than Converting it to a Pending CO
Click on the Edit CO Button to Edit this Change Order.
Convert this Change Order from "Finalized" back to "Pending"
Only administrators have rights to do this.

Enhancement: Project/Change Orders: Delete Final CO

You can now Delete Final Change Orders.

Users need to have Access Rights to Delete Final CO's.

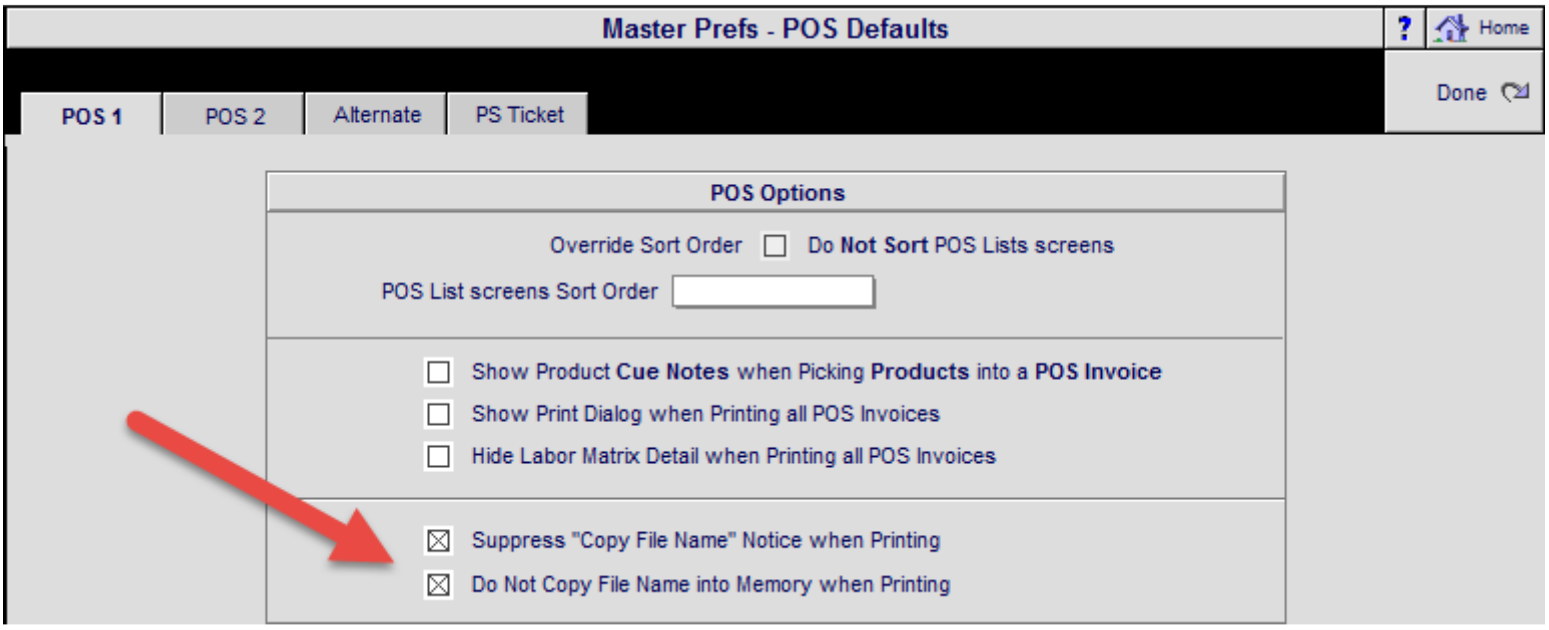
Access Rights are set in Master Prefs/Users/Access Rights



Enhancement: POS/Printing Invoices: Do not Copy File Name Option

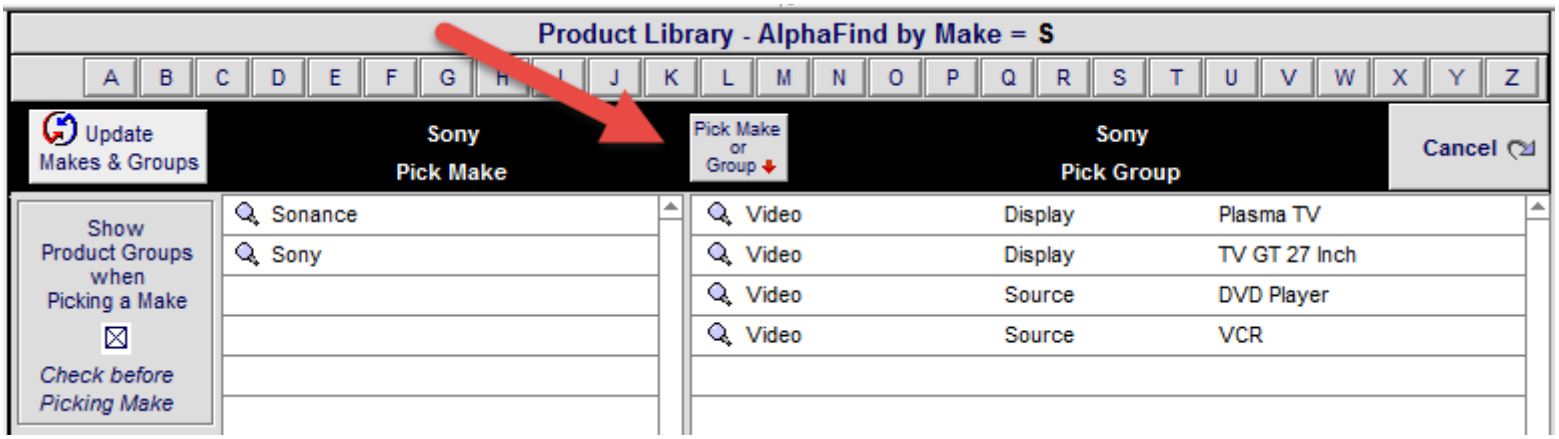
When printing a POS invoice you now can choose to Not Copy the File name so that you can paste a different copied name into the pdf file you are creating.

Please go into Master Prefs/POS Defaults to check this new Option



Enhancement: Product Library/AlphaFinder: Pick Make or Group

If you choose the option to show Product Groups when using the AlphaFinder, you now have a new button that will appear after you pick the Make, and you can choose to click on that button to simply choose the Make if you don't want to click on a Group.



Enhancement: Contact/Entities: View All Invoice and/or Project

When Viewing Project Invoices from the Contact Entity screen, you can now choose to return to the Contact screen or View all of the Project Entities or go to the Master Project itself.

Contacts - Entities

John & Mary Smith

Home | Done | New Proposal | New POS | New Task | Entity Defaults | Prev Next 4 of 132

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

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

View	Entity Kind	Number	User	Title	Created	Sold	Completed	Total	Delete
	Master Project	1284.1-1.100		Home Entertainment System		9/12/2006		$93,084.29	
	Pending CO	1284.1c1-1.100		Home Entertainment System					
	Pending CO	1284.1c2-1.100		Home Entertainment System		3/11/2007		$26,492.37	
	Finalized CO	1284.1c3-1.100		Home Entertainment System		10/22/2007		-$1,427.78	

Clicking Done gives you the Option to return to the Contact screen or
View all of the Invoices for this Project or
Go to the Master Project screen.

Setup | Email Vendor | Delete PO | Project - Purchase Order Detail | 9/12/2006 Post PO | Prev/Next | ?

Do not show Client/Project info on PO 1 | Vendor Address | Ship To Address | Hide Prices

PO Number 1076 - 1284.1-1.100
User PO #
PO Date 9/12/2006

Show: PO Number, User PO#, Client Name

Runco International
2900 Faber Street
Union City, CA 94587

EME Audio & Video Systems
100 Purchasing Lan
Purchasing City,

Done | Preview | Print & Post

Buyer: Joe Buyer
Buyer Override:
Shipping Method: Best Way
PO Terms:
PO Comments & Notes:

1284.1-1.100
John & Mary Smith

PO Total $4,797.00

Receiving: Auto Receive All PO Items
Date Received
Received By

Global Buy Pkg Off | Cost Override

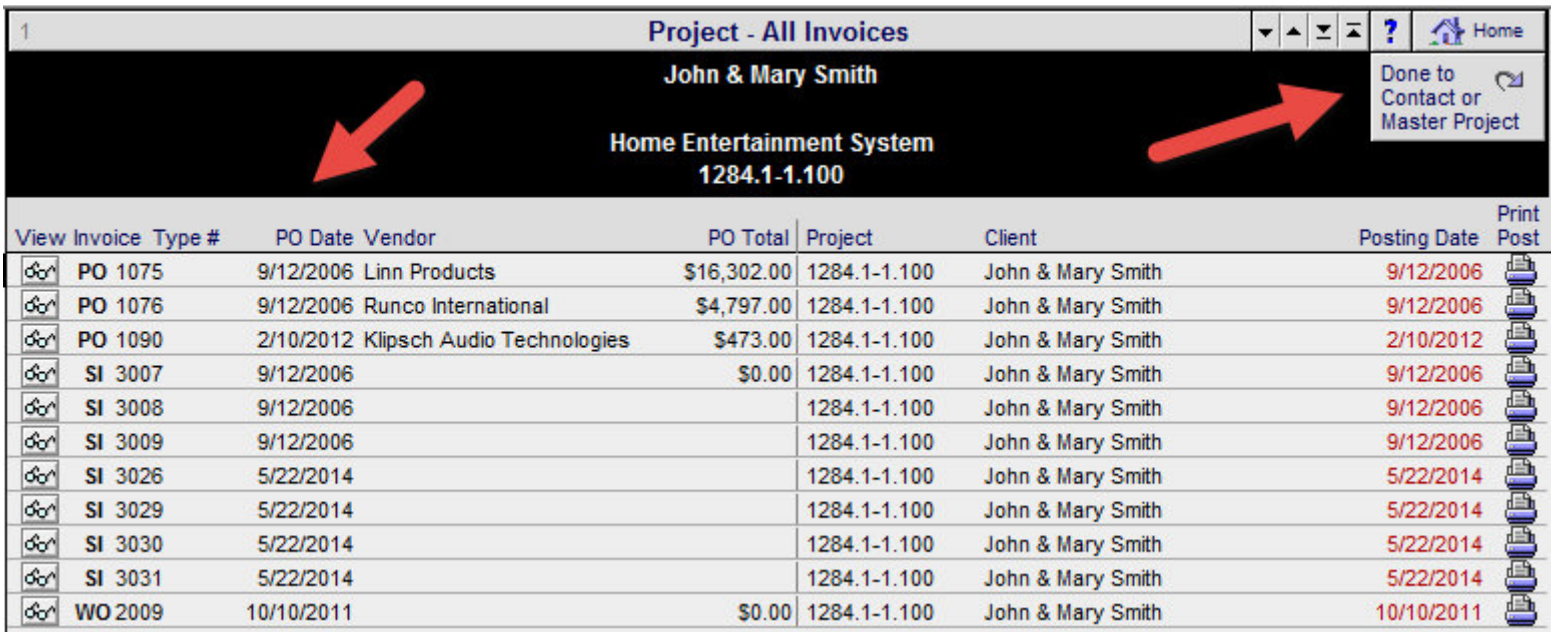
Order Qty / Buy Qty	Make / Description	Model	Finish	Unit Raw Cost	Ext Raw Cost	Receive / View-Edit	Qty Recvd	Qty Open
1 ea	Runco	CL-610		$4,797.00	$4,797.00		1	0 ea
1 ea	DLP Projector		note:					

Message

Return to Contact Entities or
All Invoices for this Project or
Master Project screen.

Project | Invoices | Contact

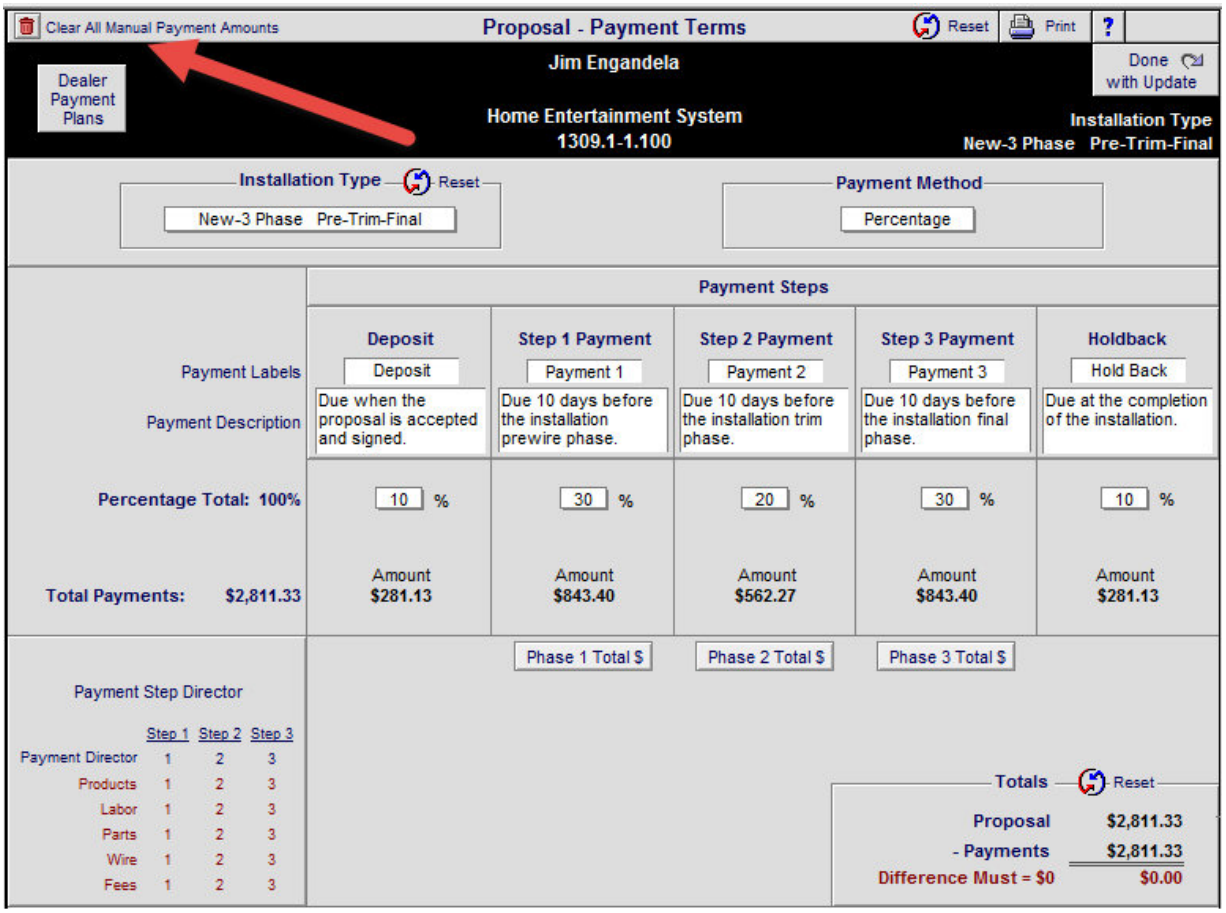
From the Project screen you can either View an existing Invoice or
Go to the Master Project screen or
Sales Invoices or Work Orders.



View Invoice	Type #	PO Date	Vendor	PO Total	Project	Client	Posting Date	Print Post
	PO 1075	9/12/2006	Linn Products	$16,302.00	1284.1-1.100	John & Mary Smith	9/12/2006	
	PO 1076	9/12/2006	Runco International	$4,797.00	1284.1-1.100	John & Mary Smith	9/12/2006	
	PO 1090	2/10/2012	Klipsch Audio Technologies	$473.00	1284.1-1.100	John & Mary Smith	2/10/2012	
	SI 3007	9/12/2006		$0.00	1284.1-1.100	John & Mary Smith	9/12/2006	
	SI 3008	9/12/2006			1284.1-1.100	John & Mary Smith	9/12/2006	
	SI 3009	9/12/2006			1284.1-1.100	John & Mary Smith	9/12/2006	
	SI 3026	5/22/2014			1284.1-1.100	John & Mary Smith	5/22/2014	
	SI 3029	5/22/2014			1284.1-1.100	John & Mary Smith	5/22/2014	
	SI 3030	5/22/2014			1284.1-1.100	John & Mary Smith	5/22/2014	
	SI 3031	5/22/2014			1284.1-1.100	John & Mary Smith	5/22/2014	
	WO 2009	10/10/2011		$0.00	1284.1-1.100	John & Mary Smith	10/10/2011	

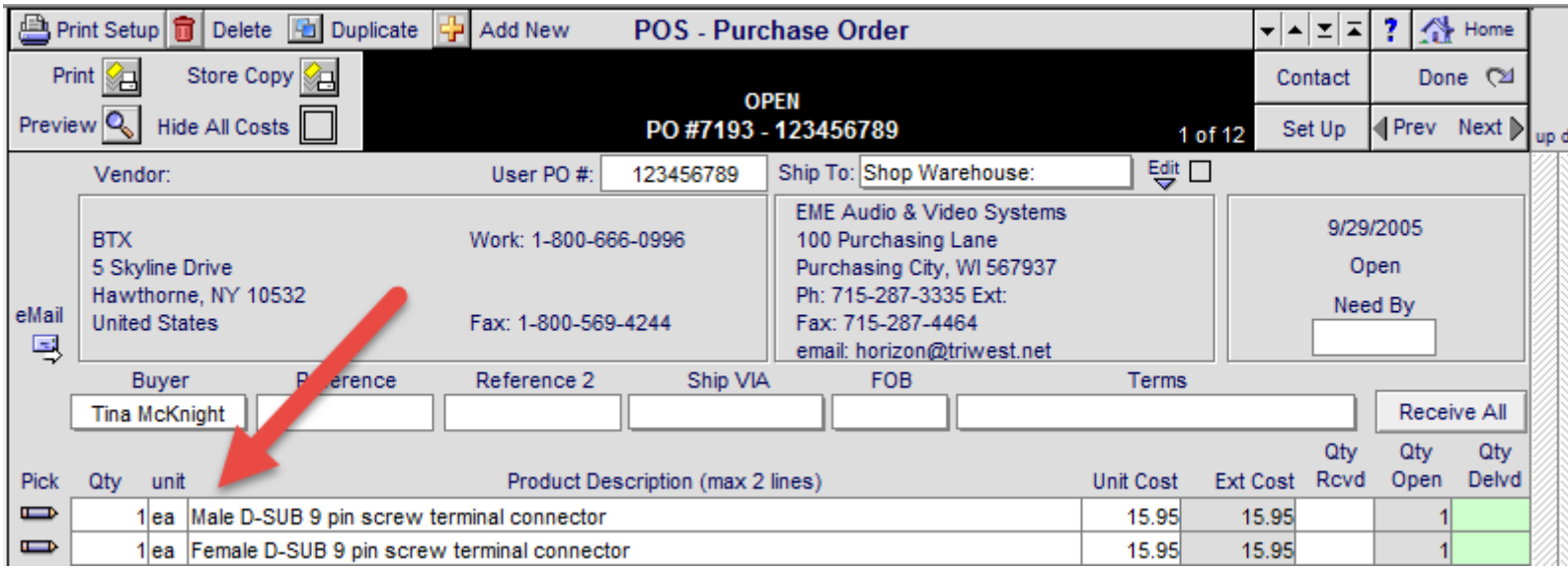
Fix: Proposal & Pending CO/Payments: Clear Manual Payment Utility

The utility that clears all Manually entered Payment Amounts now works properly and clears all Payments



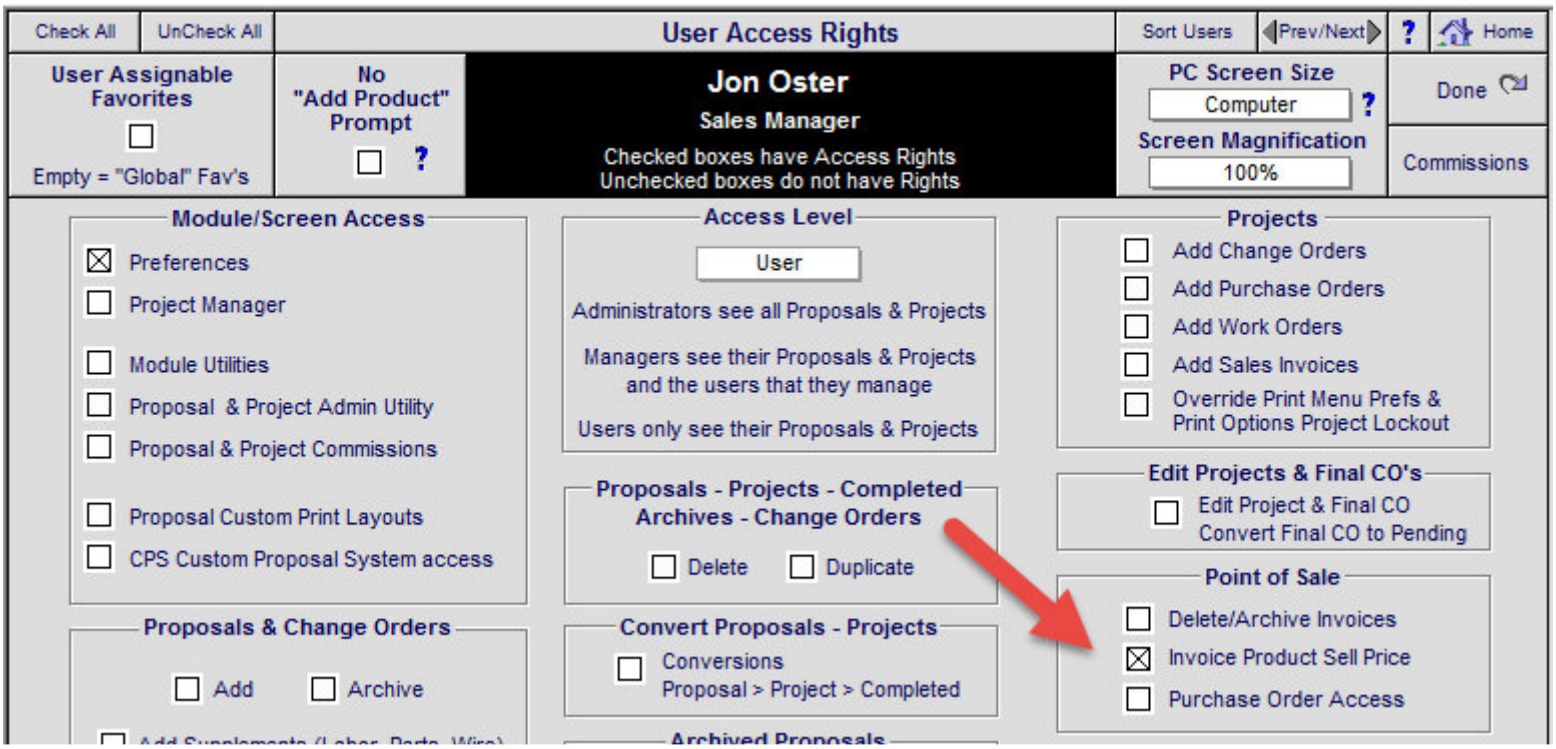
Fix: POS/Invoices: Picking Products from Product Library returns to 1st line

Creating a POS PO from the Product Library and then adding more items to the PO was causing the next PO created to add the Product to the second line on the POS Invoice instead of the 1st line. This has been corrected.



Fix: POS/Invoices: Pick Product Sell Price Access Rights

If the User did not have rights to change the POS Invoice Product Sell Price, then the Pick Product process was not able to populate the Sell Price either.
This has been corrected.



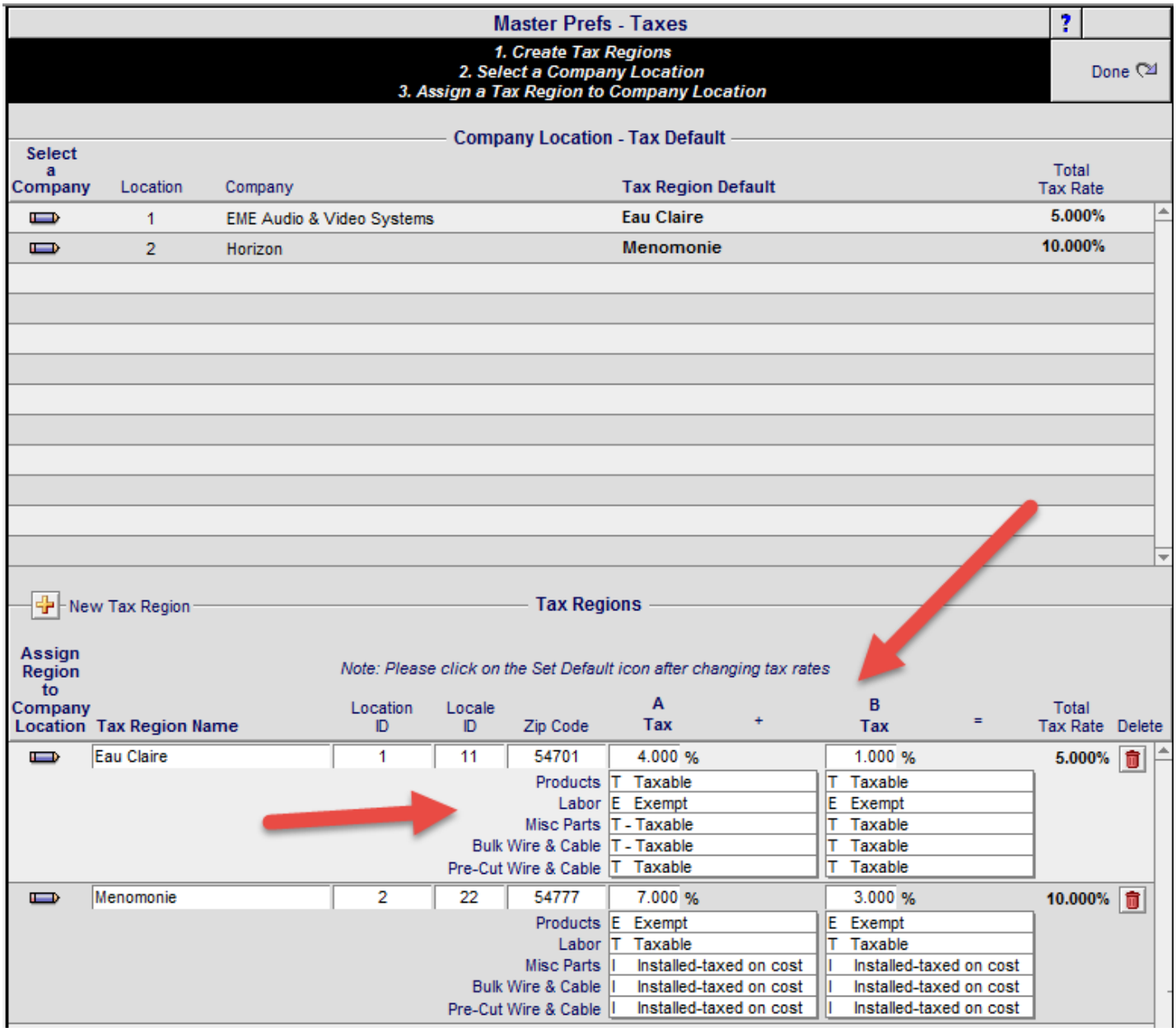
SCPS 11.7v1 Upgrade
New Features, Enhancements and Fixes
2-16-2015

Enhancement: Master Prefs/Tax: *Tax Prefs by Location & Region*

New Master Prefs/Tax screen GUI that shows Tax Preferences for each Tax Region.

After Upgrading SCPS the Tax Defaults for each Region will be automatically set to the single default settings of your previous SCPS version.

If you have more than one Tax Region, it will be necessary for you to manually set the Region Tax defaults on those Regions.



Tax Defaults for New Proposals are now automatically set (when a User Logs in) to the Master Prefs, Location and Region default settings. Of course, as always, these can be changed within any Proposal.

Use Alt Billing | Client Mode | Proposal - Client | 122 | Printer Setup | ? | Print

Client | Project | Info | Contacts | Com Log

Jim Engandela
Hardwood Manufactoring
Home Entertainment System
1316.1-1.100

Done | Follow-Up Letters

Client — Modify or Switch Contact

First Name: Jim
Last Name: Engandela
Company: Hardwood Manufactoring
Proposal Name: Jim Engandela
Fav Format: First Name + Last Name

Address

Address 1: 123 Oak Street, Building 5, Suite 1
Cross Street:
City: Chicago
State: IL Zip: 39287
Country: USA
County:

Address 2:
Cross Street:
City:
State: Zip:
Country:
County:

Email

eMail Address: horizon@triwest.net

Label

Jim Engandela
Hardwood Manufactoring
123 Oak Street
Building 5
Suite 1
Chicago, IL 39287 USA

Numbers

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

Select Tax — New | Update

Tax: Yes No
Tax Region: Eau Claire
Location ID: 1
Locate ID: 11
Tax A: 4.000%
Tax B: 1.000%
Total Tax: 5.000%

Pick	Tax Region / Location ID	Zip Code / Locale ID	Tax A / Tax B	Total Tax
	Eau Claire / 1	54701 / 11	4.000% / 1.000%	5.000%
	Menomonie / 2	54777 / 22	7.000% / 3.000%	10.000%

Tax Defaults for New POS Invoices are now automatically set (when a User Logs in) to the Master Prefs, Location and Region default settings. Of course as always these can be changed within any POS Invoice from the POS Invoice, Setup screen.

Use Alt Billing ☐ | Client Mode ☐ | **Proposal - Client** | 122 | Printer Setup | ? | Print

Client | Project | Info | Contacts | Com Log

Jim Engandela
Hardwood Manufactoring
Home Entertainment System
1316.1-1.100

Done | Follow-Up Letters

Client

Modify or Switch Contact

First Name: Jim
Last Name: Engandela
Company: Hardwood Manufactoring

Proposal Name: Jim Engandela
Fav Format: First Name + Last Name

Address

◉ Address 1: 123 Oak Street
Building 5
Suite 1
Cross Street:
City: Chicago
State: IL Zip: 39287
Country: USA
County:

○ Address 2:
Cross Street:
City:
State: Zip:
Country:
County:

Email

eMail Address: horizon@triwest.net

Label

Jim Engandela
Hardwood Manufactoring
123 Oak Street
Building 5
Suite 1
Chicago, IL 39287 USA

Numbers

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

Select Tax

New | Update

Tax ◉ Yes ○ No

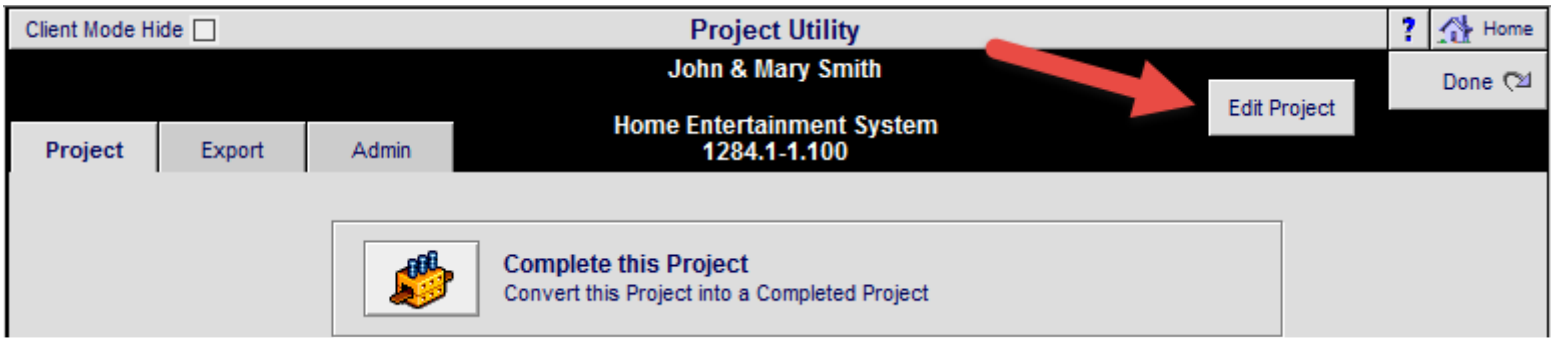
Tax Region: Eau Claire
Location ID: 1
Locate ID: 11

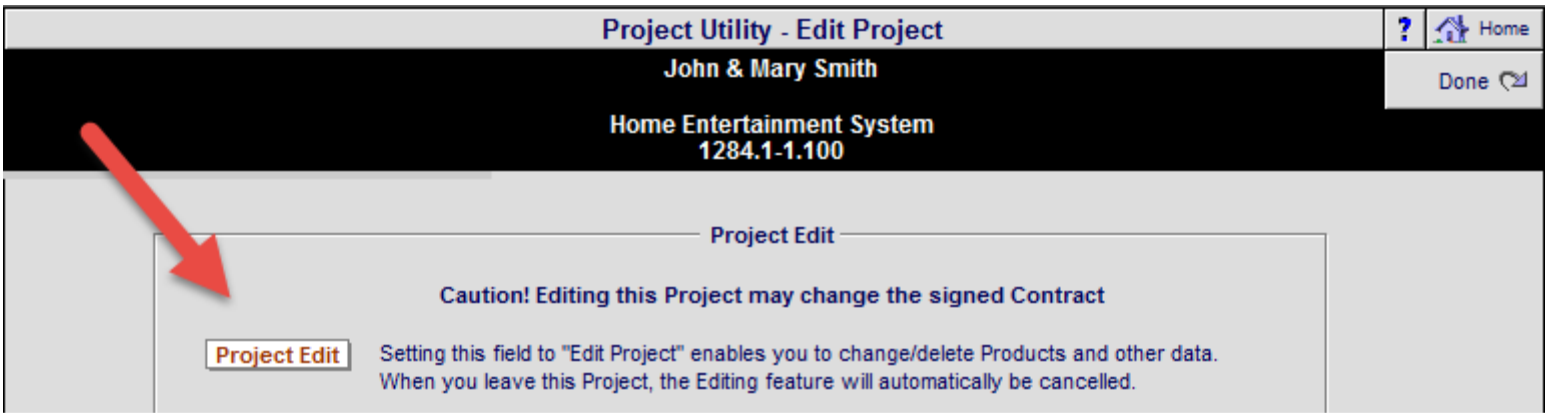
Tax A: 4.000%
Tax B: 1.000%
Total Tax: **5.000%**

Pick	Tax Region / Location ID	Zip Code / Locale ID	Tax A / Tax B	Total Tax
	Eau Claire / 1	54701 / 11	4.000% / 1.000%	**5.000%**
	Menomonie / 2	54777 / 22	7.000% / 3.000%	**10.000%**

Enhancement: Master Prefs/Users/Access Rights: *Rights for Editing Projects & Final CO's*

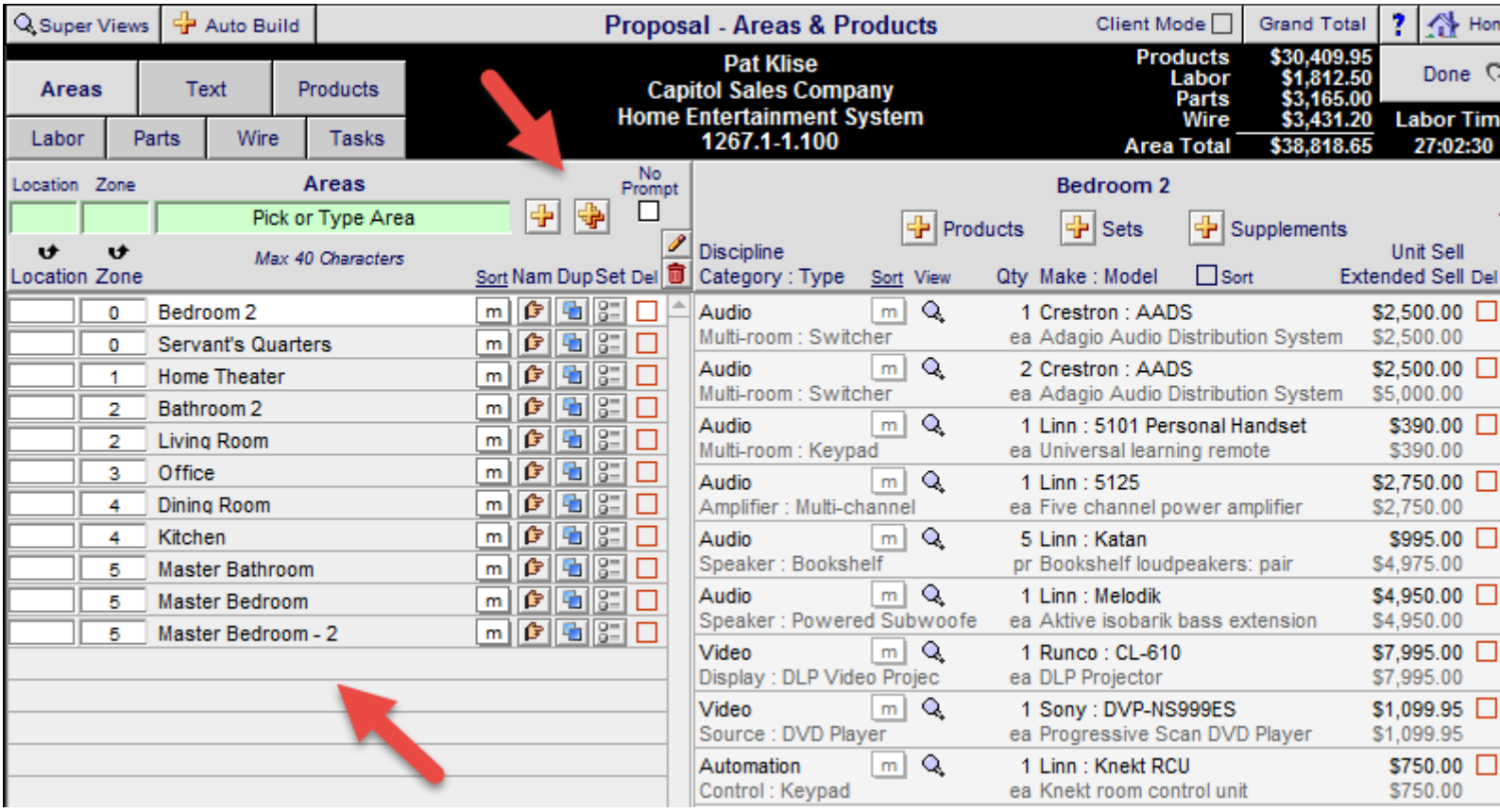
In order to Edit a Project or Final Change Order users now need to have Access Rights to do this, set in the Master Preferences screen.





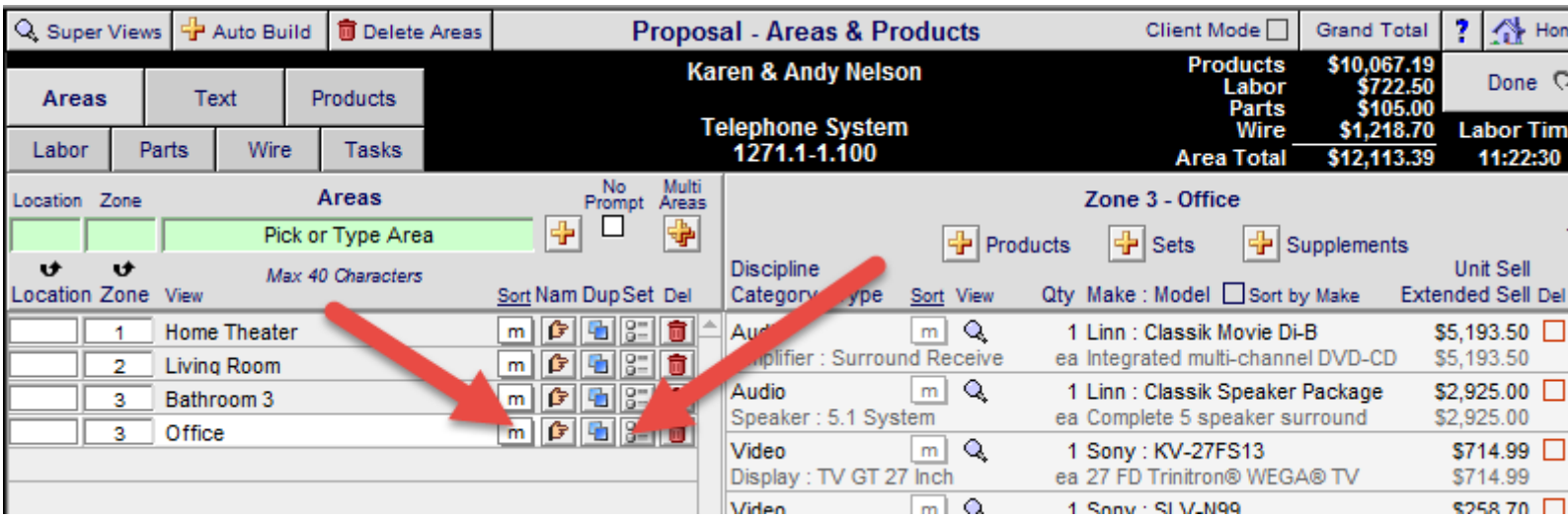
Enhancement: Proposals/Areas & Products: *Increase Area field size and Improve Area GUI*

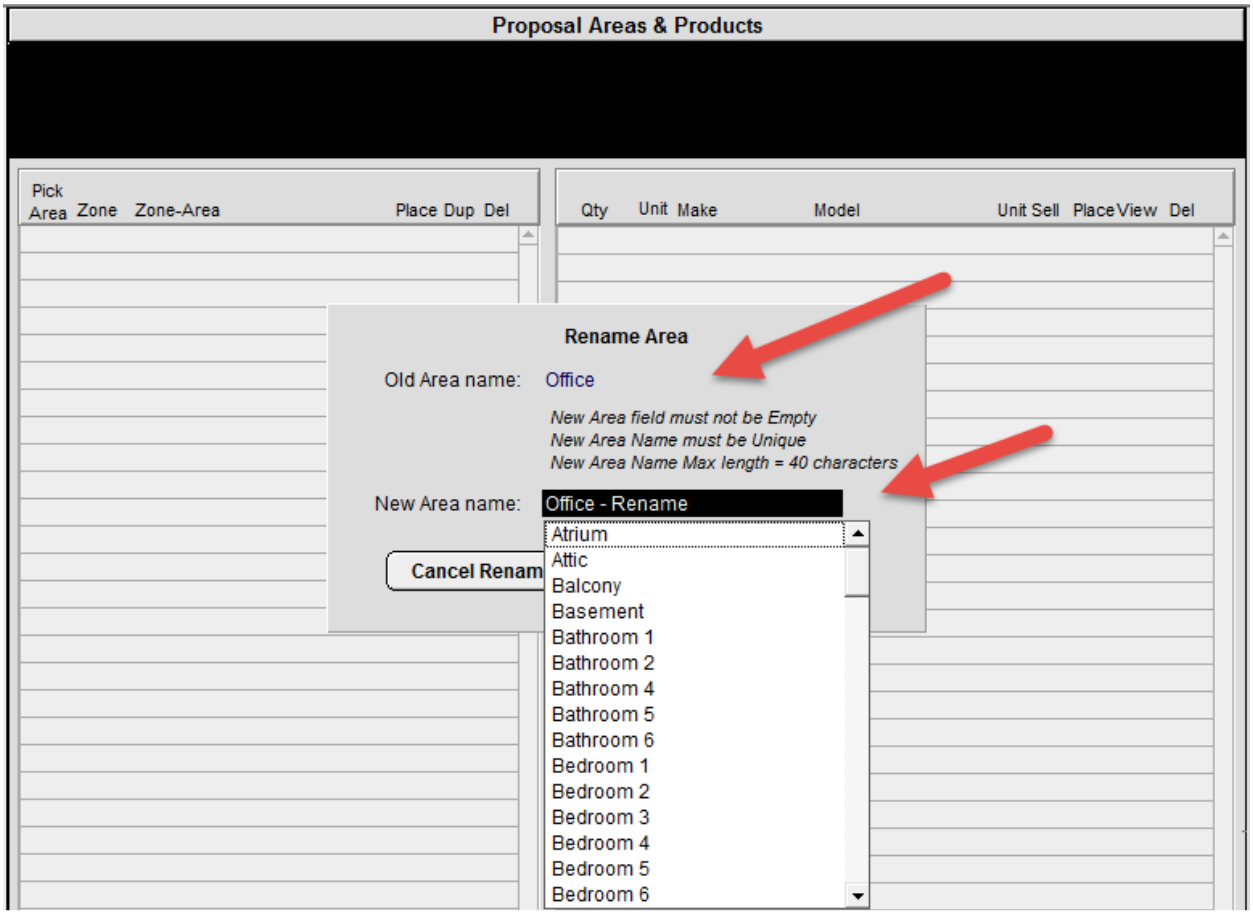
Increase size of screen, to increase size of Area field. Rearrange Area Portal Utilities for better clarity.

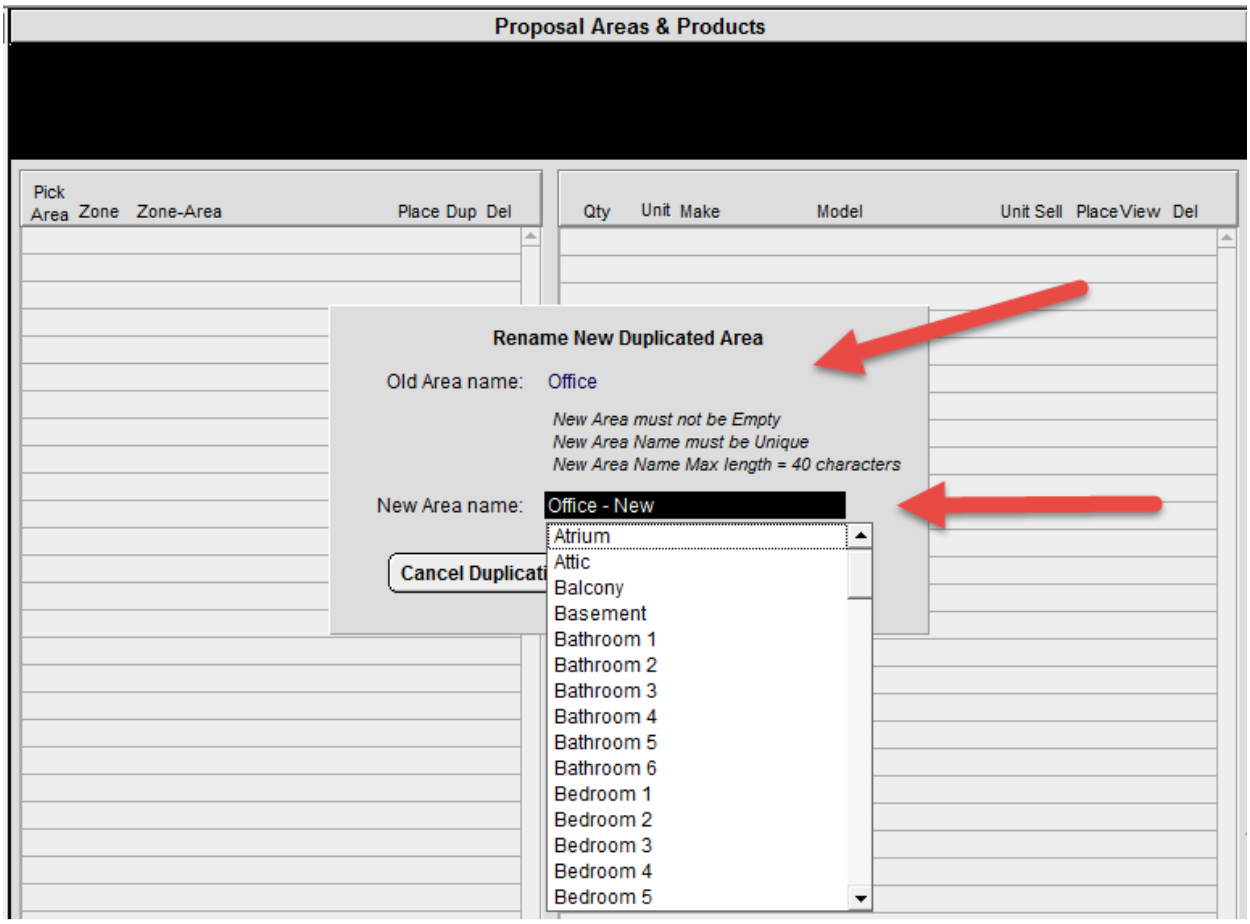


Enhancement: Proposals/Areas & Products: *Duplicate and Rename Area Improvements*

When Renaming or Duplicating an Area in a Proposal, the old Area name is now displayed, so that you know what it was, and can then change it to the new Area Name.




Proposal Areas & Products
Pick
Area Zone Zone-Area Place Dup Del
Qty Unit Make Model Unit Sell PlaceView Del
Rename Area
Old Area name: Office
New Area field must not be Empty
New Area Name must be Unique
New Area Name Max length = 40 characters
New Area name: Office - Rename
Cancel Renam
Atrium
Attic
Balcony
Basement
Bathroom 1
Bathroom 2
Bathroom 4
Bathroom 5
Bathroom 6
Bedroom 1
Bedroom 2
Bedroom 3
Bedroom 4
Bedroom 5
Bedroom 6


Proposal Areas & Products
Pick
Area Zone Zone-Area Place Dup Del
Qty Unit Make Model Unit Sell PlaceView Del
Rename New Duplicated Area
Old Area name: Office
New Area must not be Empty
New Area Name must be Unique
New Area Name Max length = 40 characters
New Area name: Office - New
Cancel Duplicati
Atrium
Attic
Balcony
Basement
Bathroom 1
Bathroom 2
Bathroom 3
Bathroom 4
Bathroom 5
Bathroom 6
Bedroom 1
Bedroom 2
Bedroom 3
Bedroom 4
Bedroom 5

Enhancement: Proposals/Products: ***Redesign Product List screen for improved clarity***

The Show All, Show Tags and Manage Tags button have been moved to the top left header bar.

The Phases and Super View buttons are now next to the other Navigation buttons.

All of the Check boxes for each Product are in a row and colored for ease of use.

The Zone - Area field has been increase in size to display the entire Zone - Area name.

Finding Zone - Areas by clicking on the underlined Zone - Area now finds only that specific Zone - Area.

Enhancement: Proposals & Pending CO's: *Option to not include Sales Tax in Summary Grand Totals*

Home Automation
for Ace Matthews All Creative Enterprises

Area Summary

	Grand Total includes Supplements
Zone 1 - Home Theater	$30,296.49
Zone 2 - Living Room	$11,062.45
Zone 4 - Dining Room	$2,024.08
Zone 4 - Kitchen	$2,024.08
Zone 5 - Master Bedroom	$7,748.00
Zone 5 - Master Bathroom	$1,521.62
Fees Grand Total	$2,455.00

Equipment	$41,046.87
Installation	$4,258.33
Misc. Parts	$3,395.68
Wire & Cable	$8,528.20
Additional Fees	$2,455.00
Total	$59,684.08
Tax	$3,007.22
Grand Total	$62,691.30

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

PDF reDirect Pro v2,winspool,Ne01: | Done

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 Area by: Zone/Location/Placement/Area
  Normal Sort = Location/Zone/Placement/Area
- [ ] Hide Footer 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

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 & Price Discount

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

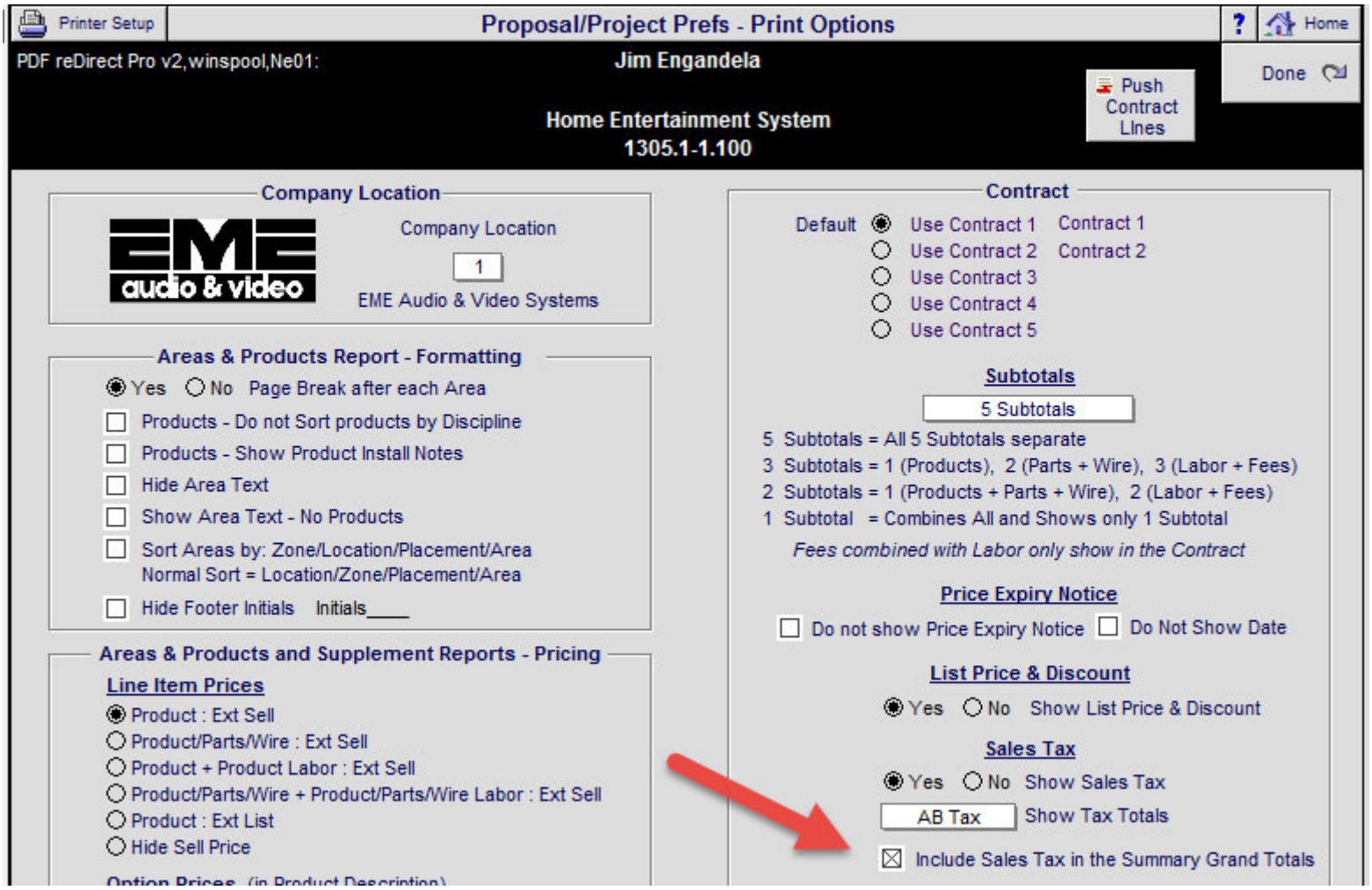
Sales Tax

(●) Yes ( ) No Show Sales Tax

AB Tax Show Tax Totals

[x] Include Sales Tax in the Summary Grand Totals

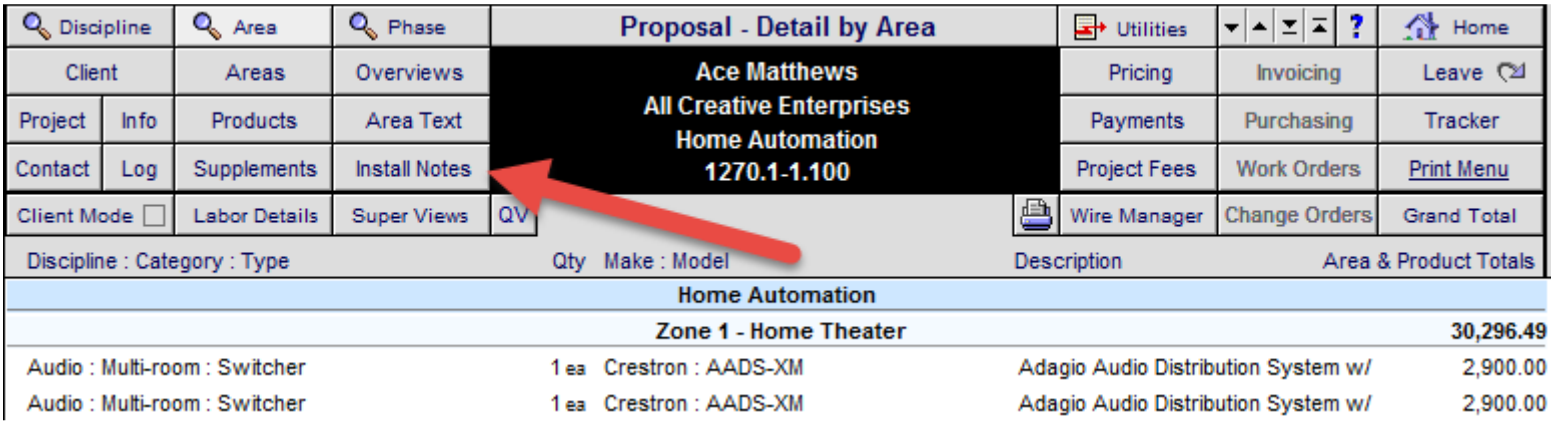
Update Existing Proposals & Pending CO's



Enhancement: Proposals & Projects: *Install Work Order Labor Time & Tech Notes*

6 Install Labor Date, Tech and Labor Time Entries can now be made on the Install Work Order forms.

Also the gray background has been removed from the Product listings on this report for better readability.



Printer Setup

Work Order - Overview, Area, Product Install Notes

Print Overview, Area & Product WO Install Notes

Edit old Overview

Ace Matthews
All Creative Enterprises
Home Automation
1270.1-1.100

Green Fields are Editable

Done

Work Orders

Pick	Zone	1 - Pick Area
	1	Home Theater
	2	Living Room
	4	Dining Room
	4	Kitchen
	5	Master Bedroom
	5	Master Bathroom

Work Order - Overview Install Notes

Installation Work Order Overview Notes

Work Order - Product Install Notes for:
Zone 1 - Home Theater CO#

Work Order- Area Install Notes for: Zone 1 - Home Theater

1/28/2015

Project Work Order - Install Notes

1

Ace Matthews
All Creative Enterprises
Home Automation
1270.1-1.100

Italic Product Notes - Permanent Intall Note

Date	Tech	Labor	Tech Notes

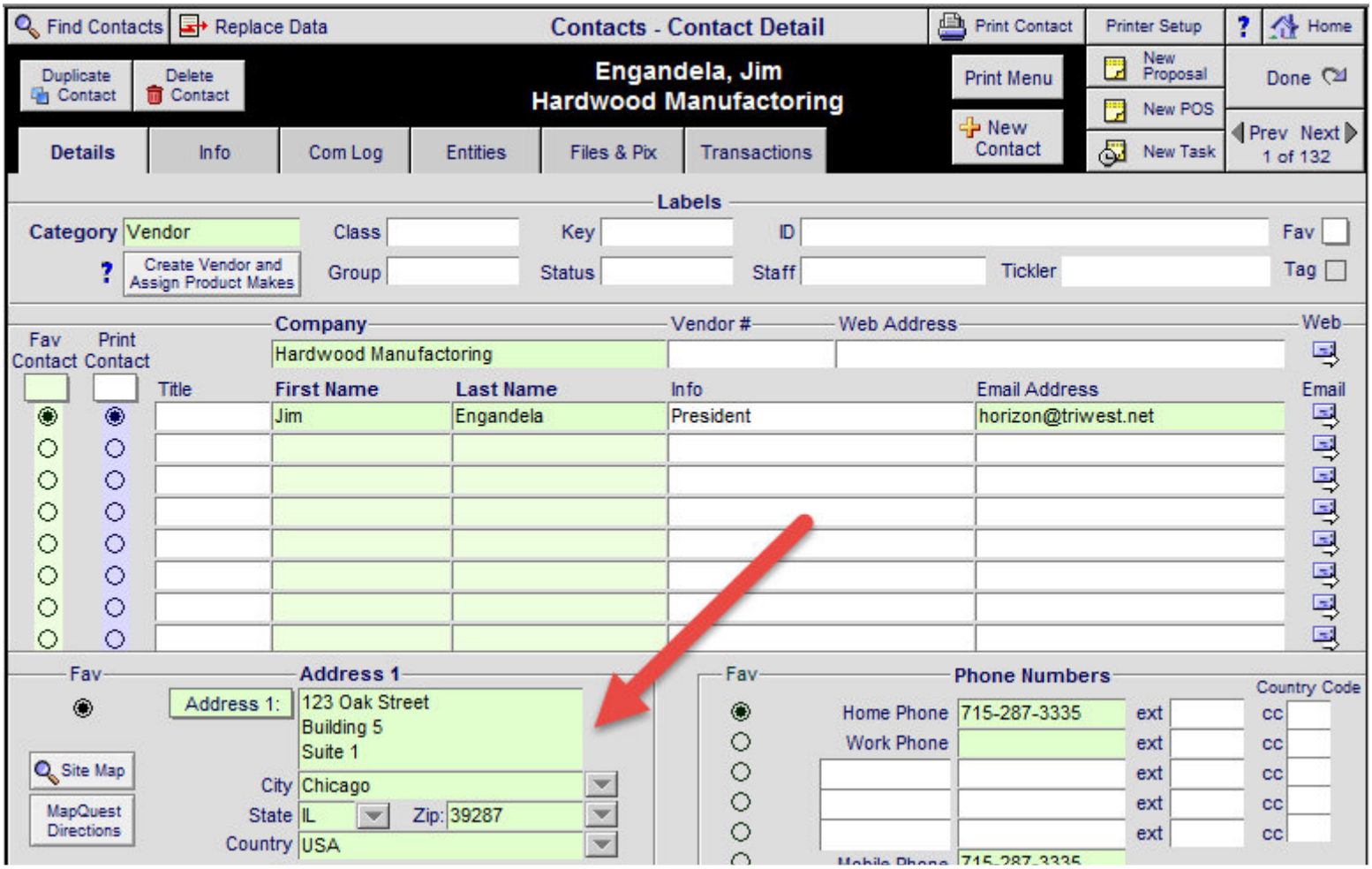
Home Automation		
Zone 1 - Home Theater		
Audio	1 ea	Crestron : AADS-XM
Audio	1 ea	Crestron : AADS-XM
Audio	1 ea	Linn : 5125
Audio	5 pr	Linn : Katan
Audio	1 ea	Linn : Melodik
Video	1 ea	Runco : CL-610
		Chief Mounts: RPA-U, RPA-129
Video	1 ea	Sony : DVP-NS999ES
Automation	1 ea	Linn : 5101 Personal Handset
Automation	1 ea	Linn : Knekt RCU
Zone 2 - Living Room		
Audio	1 ea	Klipsch : RC-35

Enhancement: Proposals/Print Menu/Cover Page: *Show Client Email on Cover Page*

If you choose the Show Phone Number and Email on the Cover Page Option in Preferences, they will both show on the Printed Proposal Cover Page.

Also the Contact Address has been increased to 3 lines and the Country will now show on the Label after the Zip code.

Users that use the Custom Proposal Reports, please contact Horizon if you wish this new Cover Page format to be added to your Reports file.



HOME ENTERTAINMENT SYSTEM

Version 1

Designed and Prepared for

Jim Engandela
Hardwood Manufactoring
123 Oak Street
Building 5
Suite 1
Chicago, IL 39287 USA

(H) 715-287-3335
horizon@triwest.net

Jim Engandela
President

Enhancement: Project Manager/Sales Commissions: *Project Salesman's Commissions*

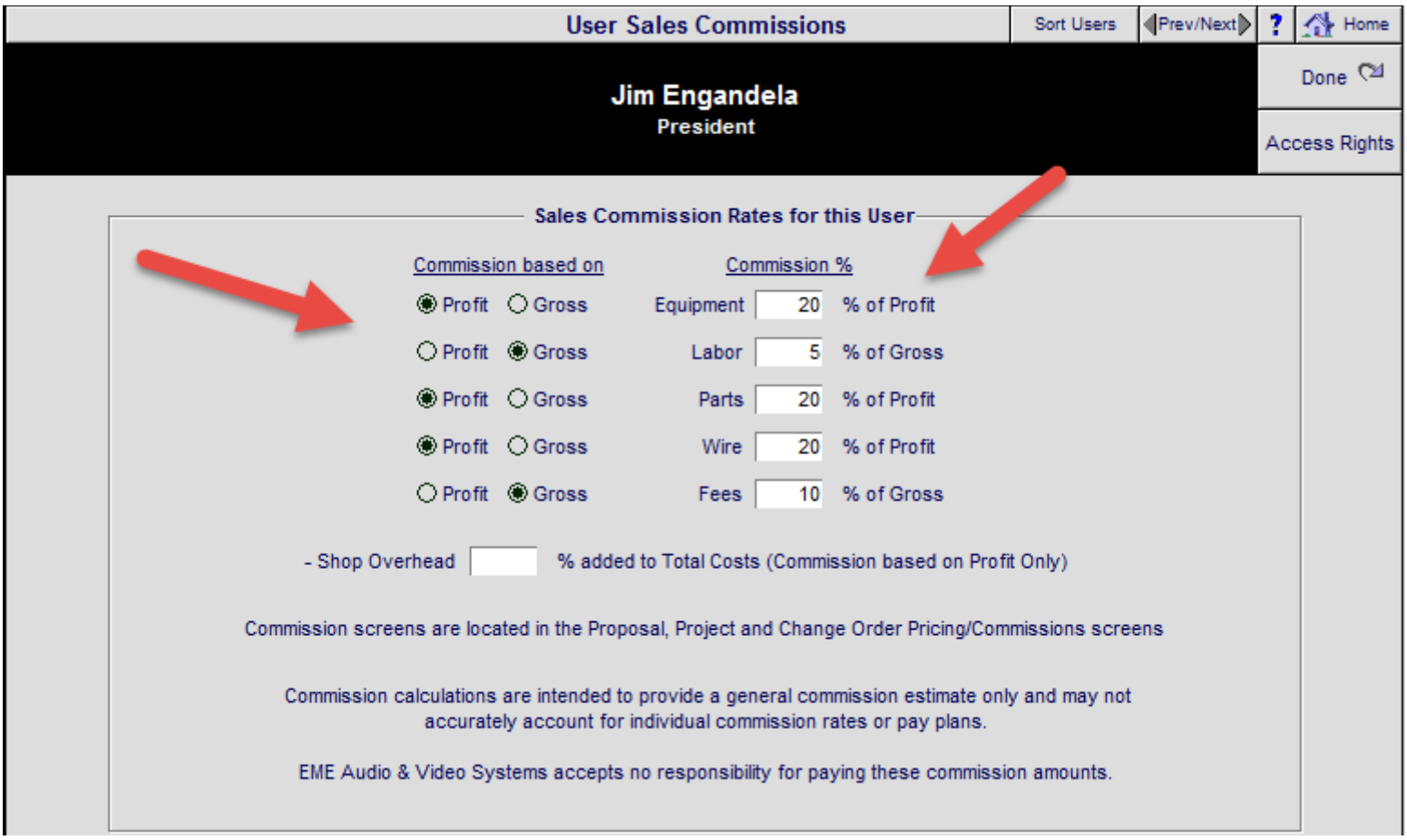
Project Sales Commission can now be automatically calculated and a Report printed for individual or All Salesmen for any date period.

***Please note**: This is new module and you should double check all of the commission numbers for accuracy before paying any salesman commission.*

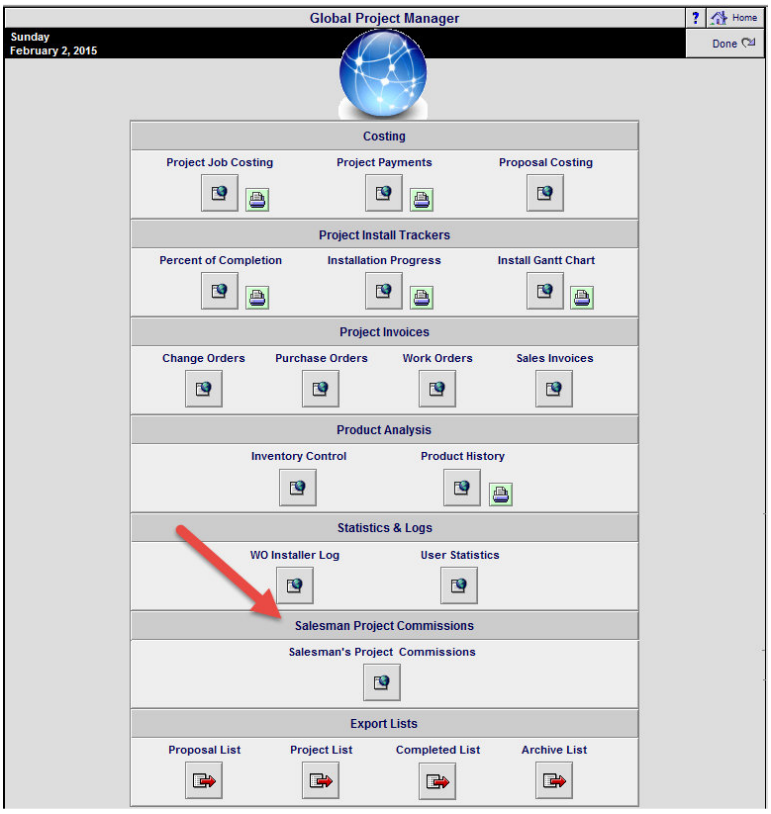
Please let Horizon know your thoughts and ideas for this new module.

First Setup Users Sales Commissions Defaults for each User, in Master Preferencces/Users/Access Codes/Commission.

This Commission Table can also be modified for any individual Project, from the Pricing/Commissions screen within a Project.



Then Update the Sales Commission calculations for all Project in SCPS.



Find Salesman | Print | Printer Setup | **Project Commissions** | Sort | Home

Show All Projects — 12 Projects

Start Date 1/1/2006 to End Date 2/1/2007

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

User Commission Rates are set in Master Prefs for each User. Set them first and then click on Update All Projects >

Leave

Update All Projects to User Commission Rates

Salesman	Commision %	Based on	Gross	Profit		Commission Amount	View	Project Number	Client Company	Sold Date	Totals
Jim Engandela					%			**1297.1-1.10**	**Asher, LeRoy**	6/30/2014	**$50,033.20**
Equipment	10.0 %	Gross	$3,900.00	$1,560.00	=	$775.00					
Labor	10.0 %	Gross	$7,750.00	$3,633.33	=	$2,815.00					
Parts	10.0 %	Gross	$28,150.00	$11,290.00	=	$702.00			Spit Commissions		
Wire	10.0 %	Gross	$7,020.00	$3,240.00	=	$63.81		Salesman:	Jim Engandela	40.0 % =	**$1,898.32**
Fees	10.0 %	Gross	$638.10	$326.85	=	$63.81		Split with:	Sandy Engandela	60.0 % =	**$2,847.49**
		Total	**$47,458.10**	**$20,050.18**		**$4,745.81**				**Total Commisions**	**$4,745.81**
Jim Engandela					%			**1288.1-1.10**		4/25/2007	**$6,959.39**
Equipment	10.0 %	Gross	$4,270.25	$1,606.75	=	$68.90					
Labor	10.0 %	Gross	$689.03	$311.75	=	$21.00					
Parts	10.0 %	Gross	$210.00	$86.00	=	$105.94			Spit Commissions		
Wire	10.0 %	Gross	$1,059.40	$504.40	=	$45.04		Salesman:	Jim Engandela	% =	**$667.91**
Fees	10.0 %	Gross	$450.42	$225.21	=	$45.04		Split with:		% =	
		Total	**$6,679.10**	**$2,734.11**		**$667.91**				**Total Commisions**	**$667.91**

You can then choose to Print all of the Sales Commissions or use the Find Salesman button to find a specific Salesman or date range.

Clear Fields | **Find Commsions - Utility**

Enter find criteria and click the Done/Find button

Done Find | Cancel

Salesman: Jim Engandela

Date Range
creation date from proposal list
Today 2/15/2015
Start Date 8/9/2011 to End Date 3/11/2007

Entity Number

Client | **Company** | **Title**

Then Print the Commission Report.

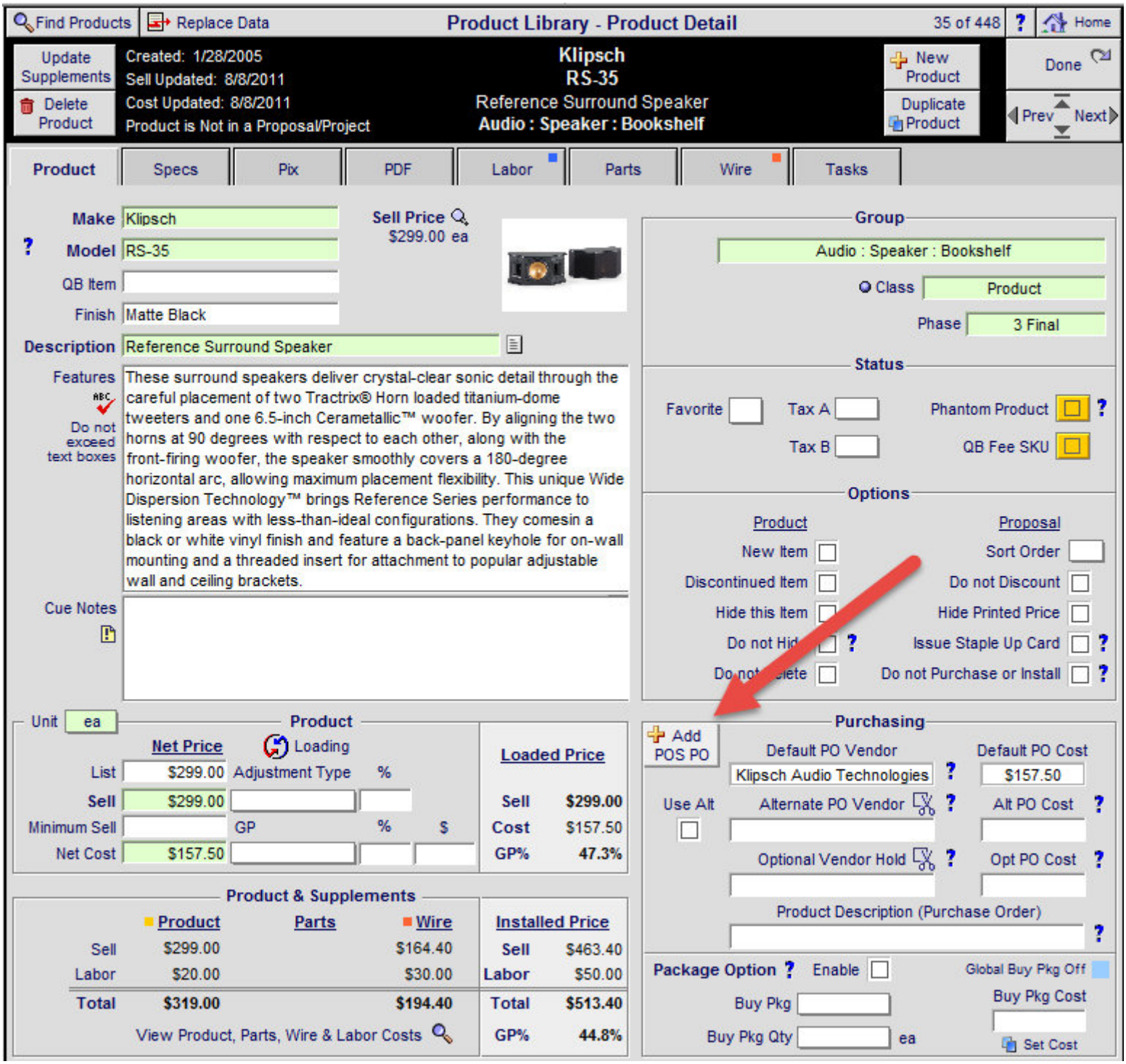
Start Date		End Date	EME Audio & Video Systems - Confidential Report	2/15/2015
8/9/2011	to	3/11/2007	**Sales Commissions**	Page 3

Salesman	Commision %	Based on	Gross	Profit		Commission Amount	View	Project Number	Client Company	Sold Date	Totals
Jim Engandela					%			**1297.1-1.10**	**Asher, LeRoy**	6/30/2014	**$50,033.20**
Equipment	10.0 %	Gross	$3,900.00	$1,560.00	=	$775.00					
Labor	10.0 %	Gross	$7,750.00	$3,633.33	=	$2,815.00					
Parts	10.0 %	Gross	$28,150.00	$11,290.00	=	$702.00			Spit Commissions		
Wire	10.0 %	Gross	$7,020.00	$3,240.00	=	$63.81		Salesman:	Jim Engandela	40.0 % =	**$1,898.32**
Fees	10.0 %	Gross	$638.10	$326.85	=	$63.81		Split with:	Sandy Engandela	60.0 % =	**$2,847.49**
		Total	**$47,458.10**	**$20,050.18**		**$4,745.81**				**Total Commisions**	**$4,745.81**
Jim Engandela					%			**1298.1-1.10**	**Asher, LeRoy**	7/2/2014	**$40,906.38**
Equipment	10.0 %	Gross	$37,500.00	$18,750.00	=	$67.50					
Labor	10.0 %	Gross	$675.00	$337.50	=	$0.00					
Parts	10.0 %	Gross	$0.00	$0.00	=	$0.00			Spit Commissions		
Wire	10.0 %	Gross	$0.00	$0.00	=	$189.53		Salesman:	Jim Engandela	% =	**$4,007.03**
Fees	10.0 %	Gross	$1,895.25	$1,022.63	=	$189.53		Split with:		% =	
		Total	**$40,070.25**	**$20,110.13**		**$4,007.03**				**Total Commisions**	**$4,007.03**
Jim Engandela					%			**1303.1-1.10**	**Engandela, Jim**		**$2,811.33**
Equipment	10.0 %	Gross	$2,500.00	$1,250.00	=	$4.50			**Hardwood Manufactoring**		
Labor	10.0 %	Gross	$45.00	$22.50	=	$0.00					
Parts	10.0 %	Gross	$0.00	$0.00	=	$0.00			Spit Commissions		
Wire	10.0 %	Gross	$0.00	$0.00	=	$12.64		Salesman:	Jim Engandela	10.0 % =	**$26.71**
Fees	10.0 %	Gross	$126.35	$68.18	=	$12.64		Split with:	Dave Dowling	90.0 % =	**$240.42**
		Total	**$2,671.35**	**$1,340.68**		**$267.14**				**Total Commisions**	**$267.14**
										Jim Engandela Total Commisions	**$42,154.09**

Enhancement: Product Library/Product Detail: *Add POS PO for Product*

You can now create a POS Purchase Order for a Product directly from the Product Library Detail screen. If a Contact Vendor has not been created, you will be requested to create one prior to creating the PO.

Once the PO is created you can Pick additional Products to Add to that PO.



Print Setup | Delete | Duplicate | Add New | **POS - Purchase Order** | Home

Print | Store Copy | Preview | Hide All Costs

OPEN
PO #7230

1 of 1

Contact | Done | Set Up | Prev | Next

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

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

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

eMail

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

1/9/2015
Open
Need By

Buyer	Reference	Reference 2	Ship VIA	FOB	Terms
Joe Buyer					

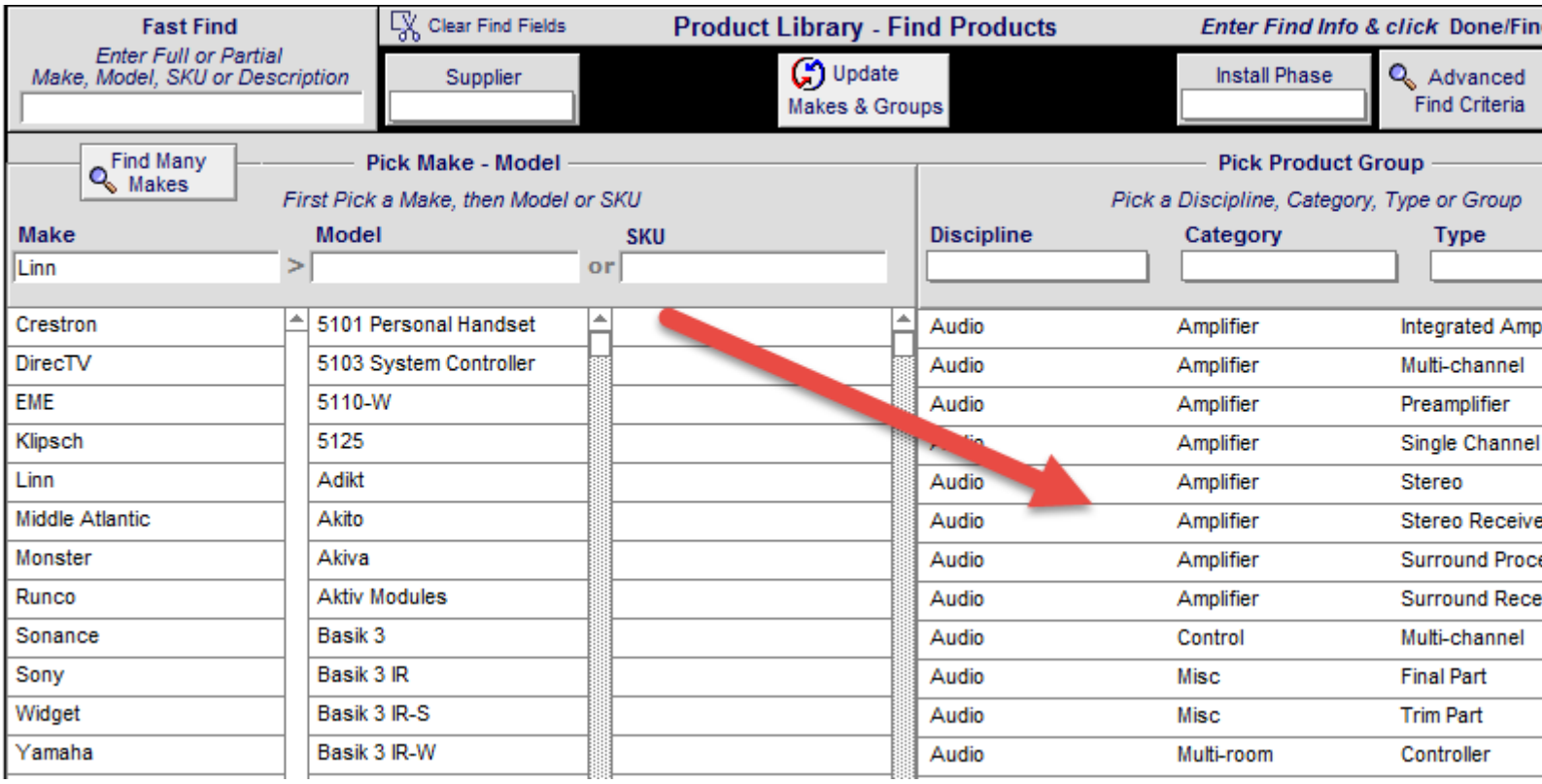
Receive All

Pick	Qty	unit	Product Description (max 2 lines)	Unit Cost	Ext Cost	Qty Rcvd	Qty Open	Qty Delvd
	2	ea	Klipsch : RS-35 : Reference Surround Speaker : Matte Black	157.50	315.00		2	

0
1
2
3
4
5
6
7
8
9
10
15
20
25

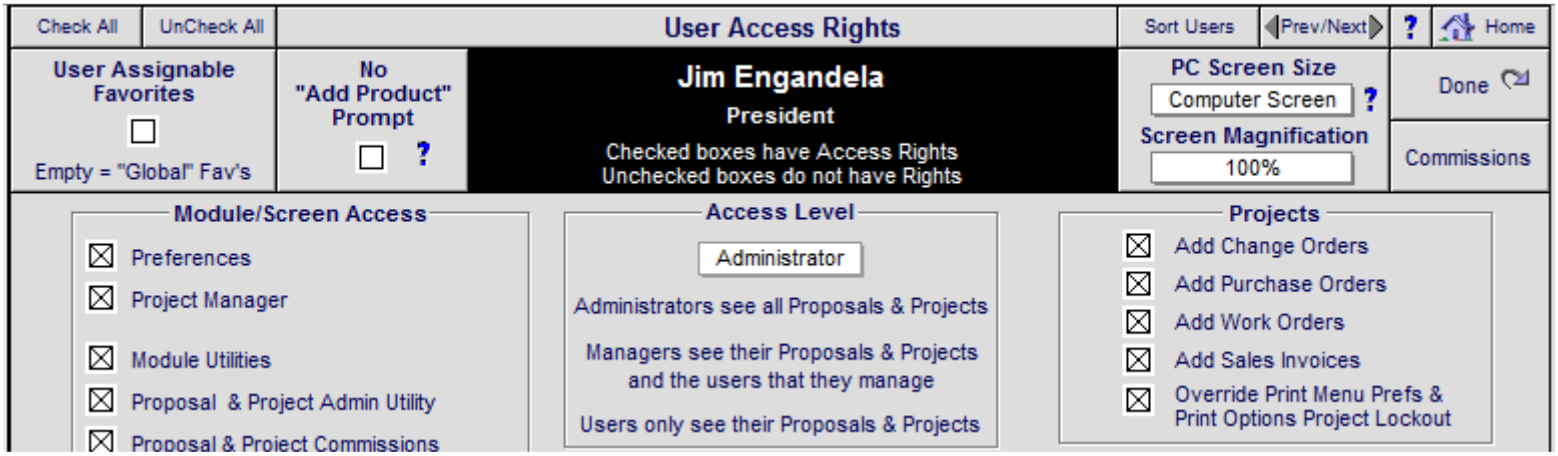
Enhancement: Product Library/Find Products: *Improve Find GUI & show only Groups with Products*

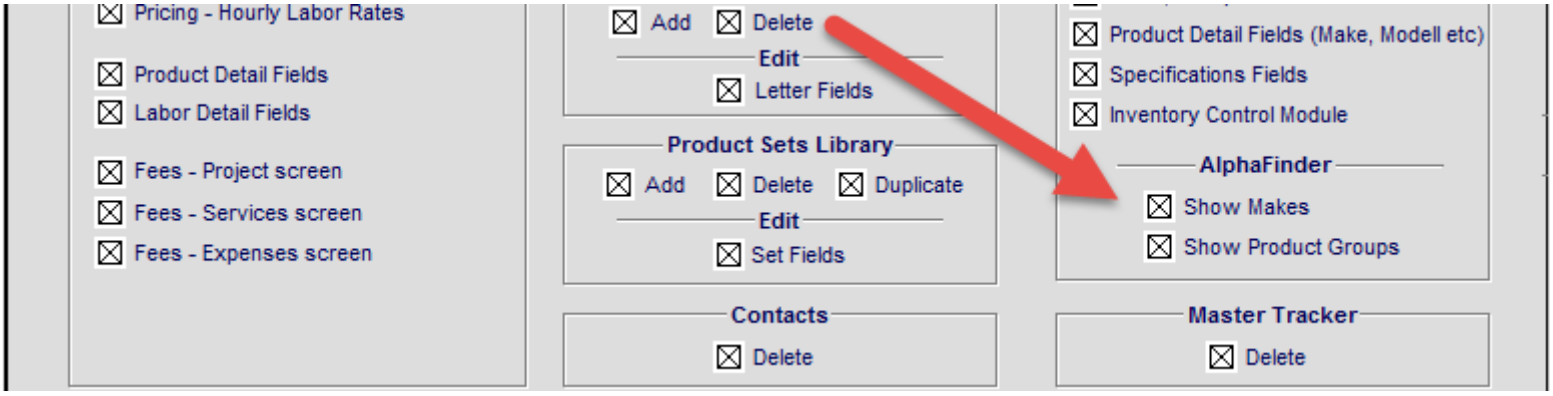
Improve Find GUI & show only Groups with Products assigned to them.



Enhancement: Product Library/AlphaFinder: *Find by Group - User Option*

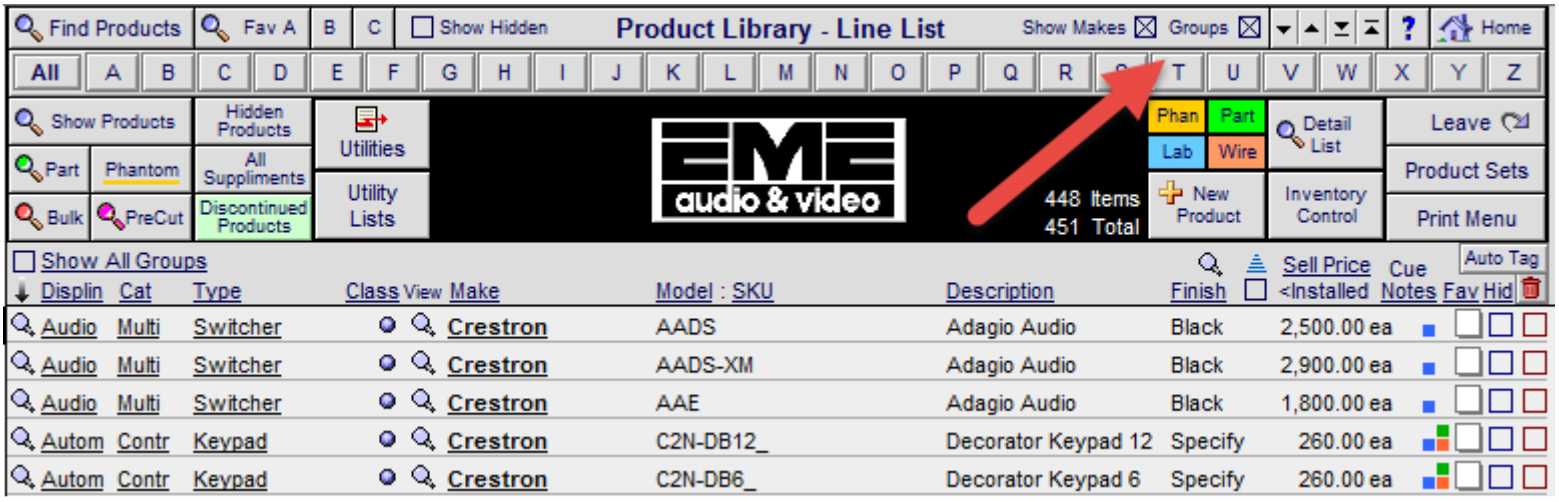
Each User can set his own Product Library - AlphaFinder Group Option in Master Prefs/Users/Access Rights.



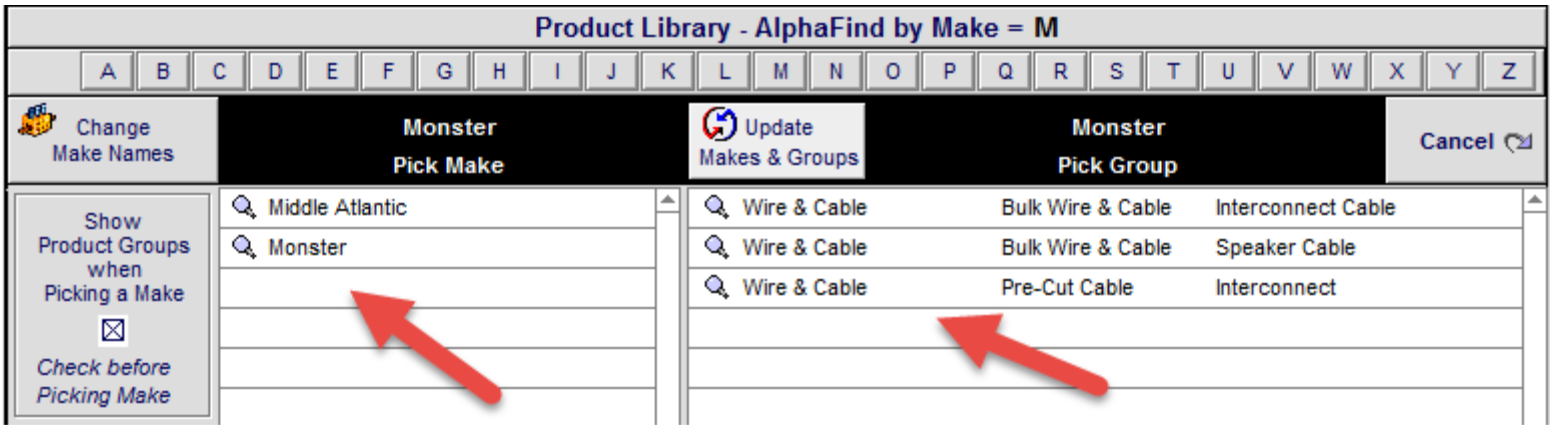


When selecting a Make in the AlphaFinder, all of the Product Groups for that Make will appear and the desired Group can be selected, which will then show only the Product for that Make and Group.

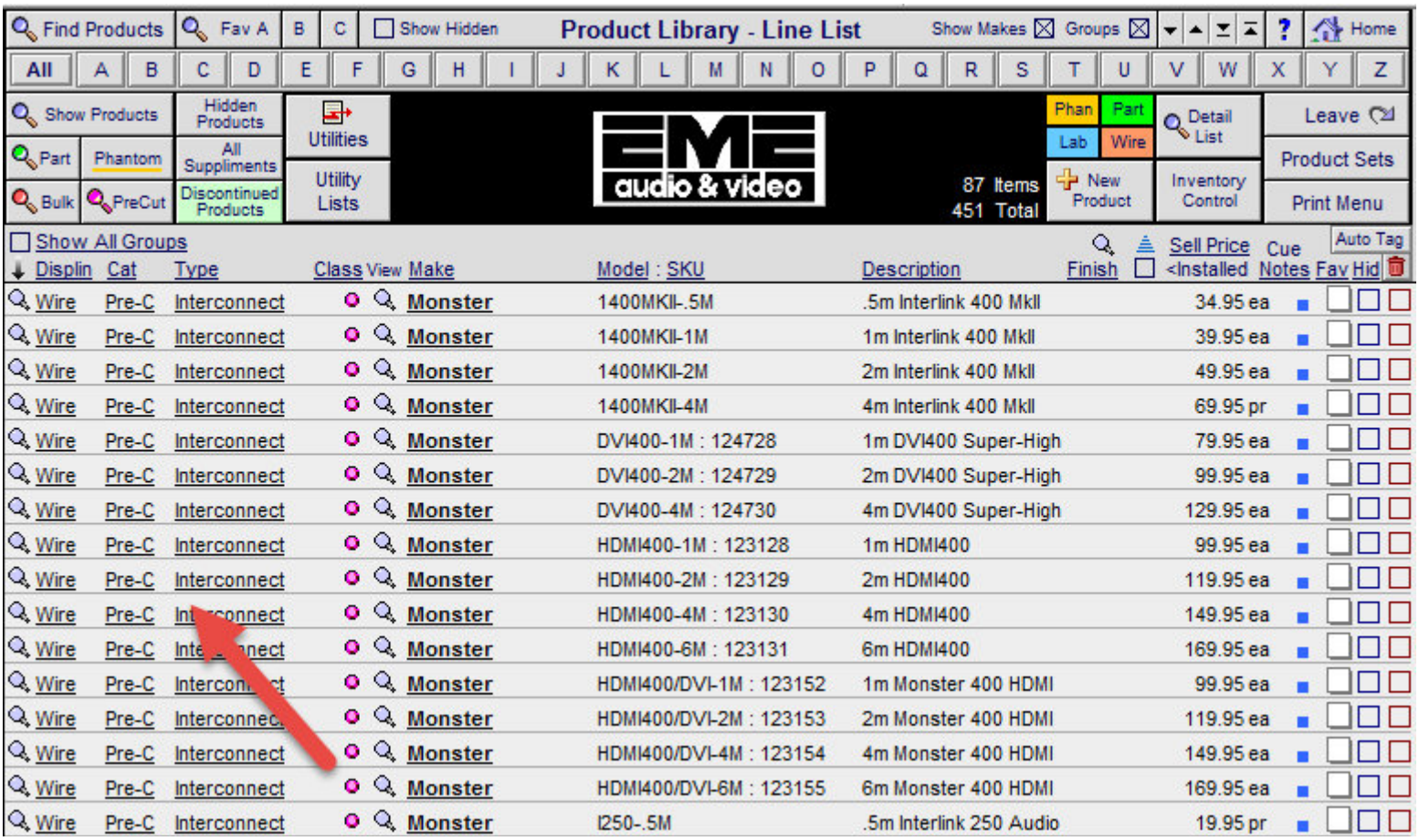
These User Default settings can be changed in the Product Library at any time, but will be reset to the User Default when Entering the Product Library.



Clicking on the desired Make int he AlphaFind screen will display all of the Product Groups for that Make

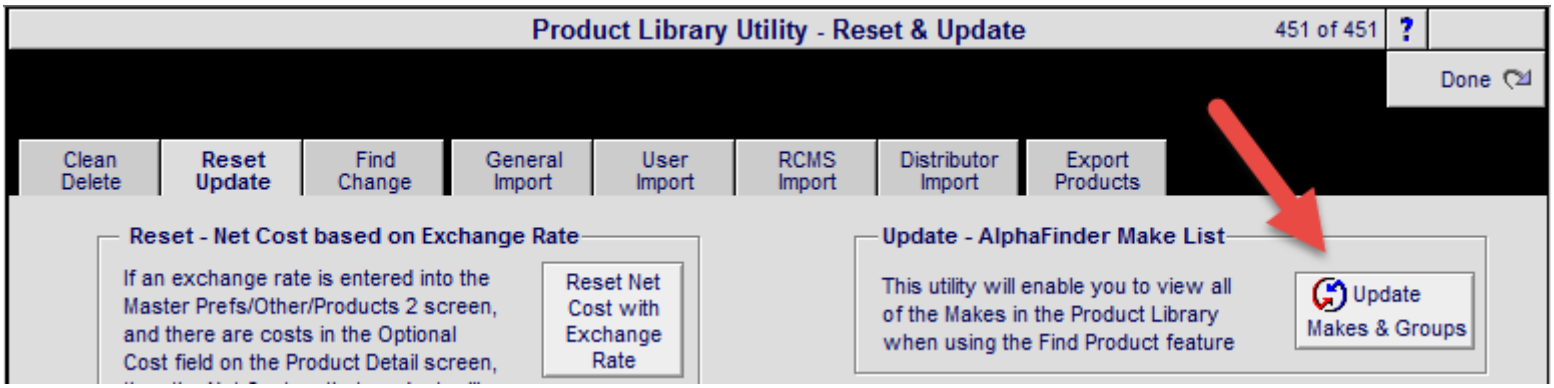


Click on the desired Product Group with show all of the Products in the Assigned to that Product Group.



Enhancement: Product Library/Utility/Reset Update: *Update Makes & Groups*

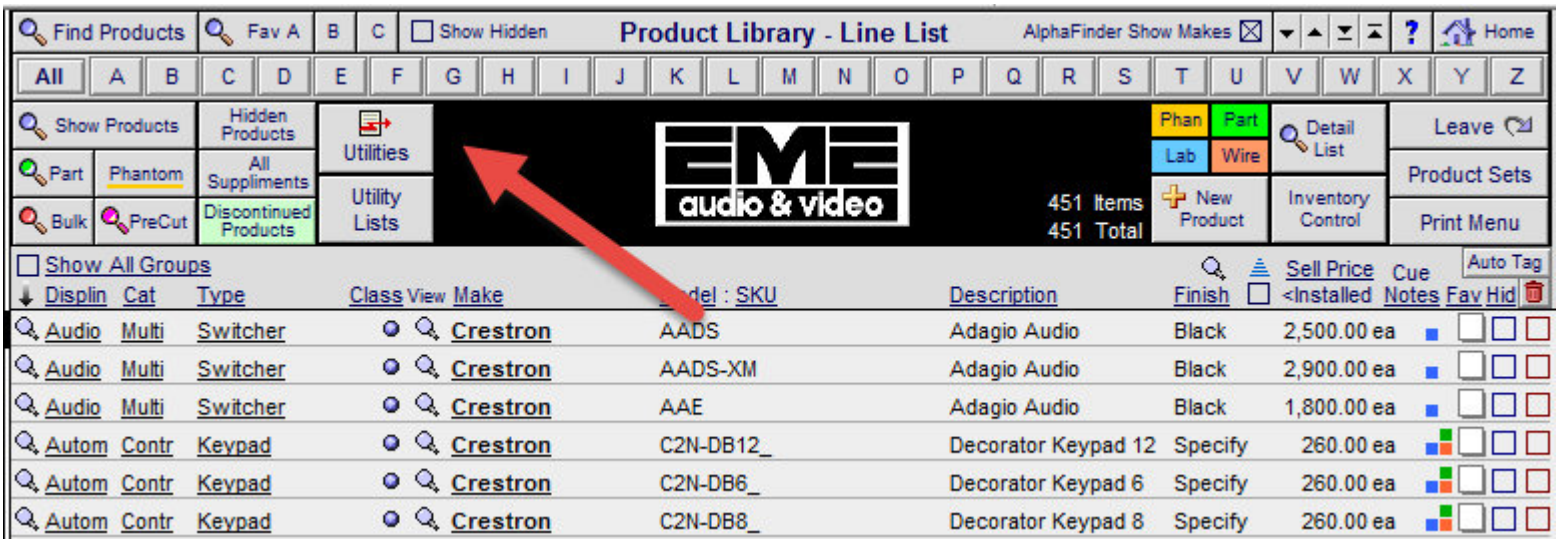
Updating Product Makes and Groups in the Product Library routine has been improve to increase th processing speed.

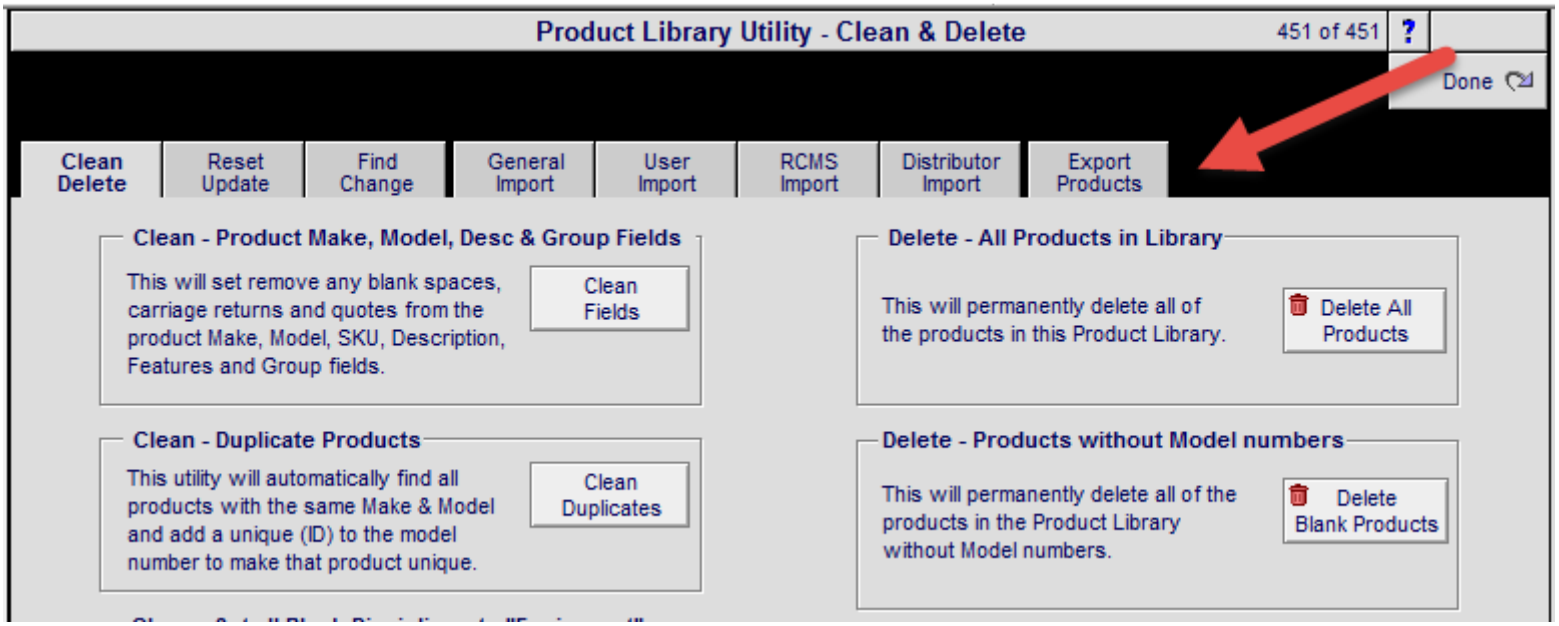


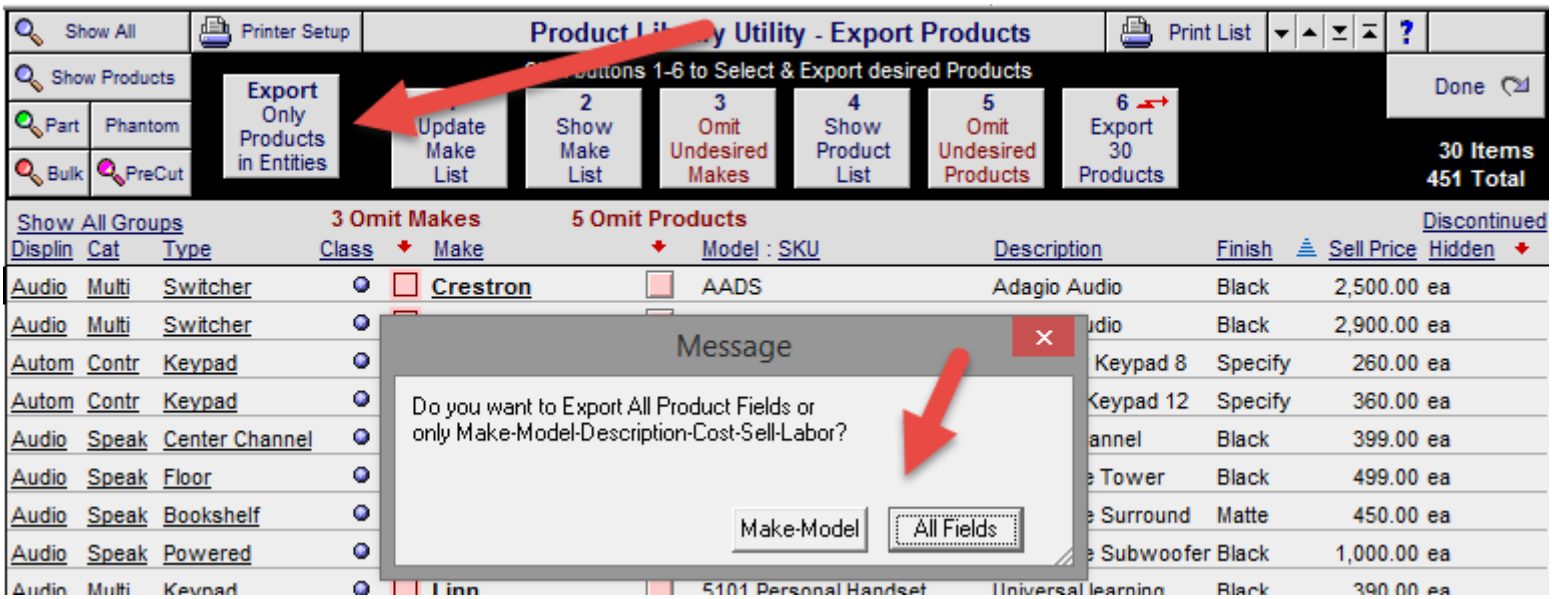
Enhancement: Product Library/Utilities/Export: *Export Only Products in Entities*

You can now export only Products that are in Entities. Entities are Proposals, Projects, Change Orders and Completed Projects.

You also have the choice to Export All Product Fields or only Make - Model -Description - Cost -Sell - Labor





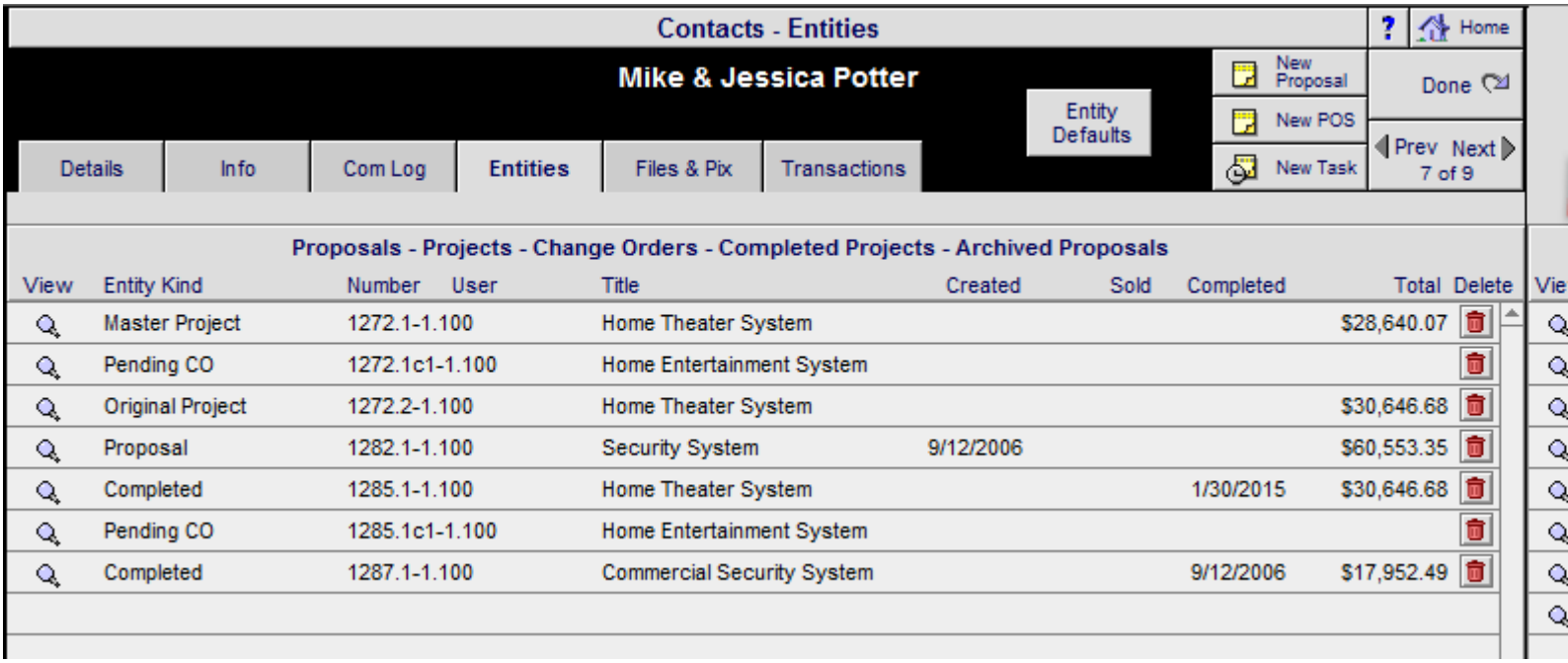


Opened file in Excel

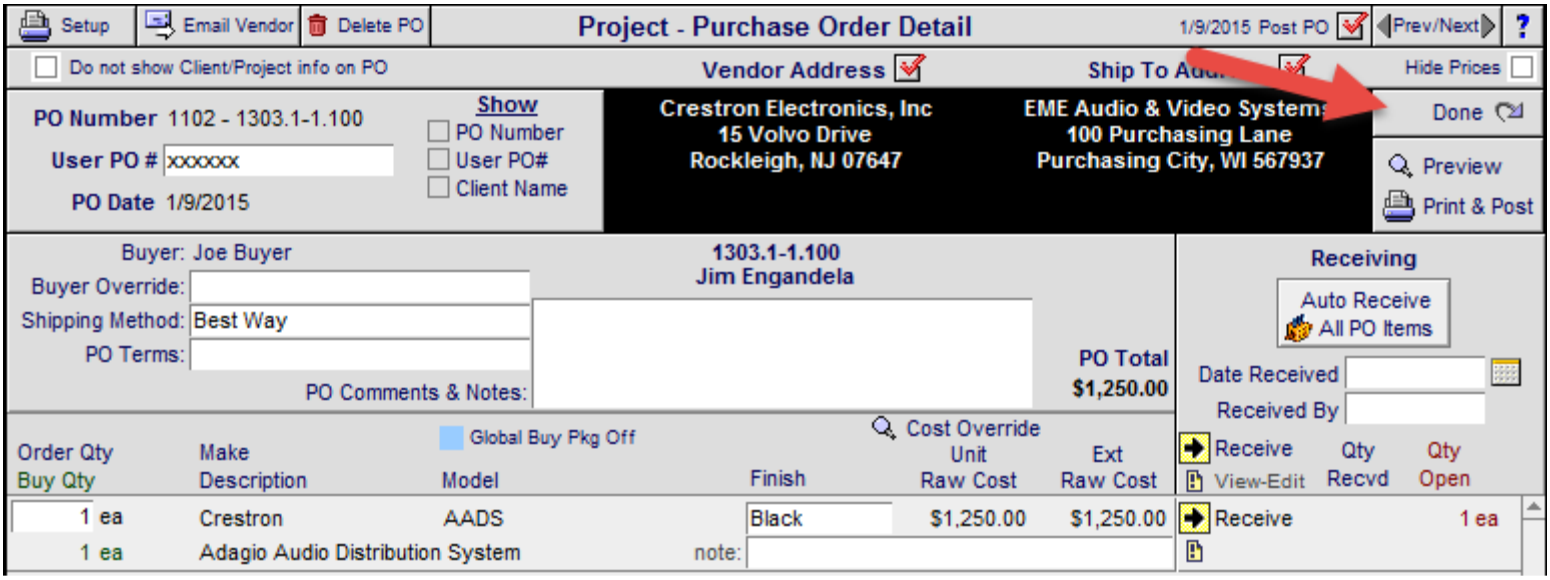
PD_MAKE	PD_MODEL	PD_SKU	PD_DESCRIP
Crestron	AADS		Adagio Audio Distribution System
Crestron	AADS-XM		Adagio Audio Distribution System w/ XM Sat Radio
Crestron	C2N-DB8_		Decorator Keypad 8 Button
Crestron	CNX-B12_		Designer Keypad 12 Button
Klipsch	RC-35		Center Channel Speaker
Klipsch	RF-35 (6483)		Reference Tower Speaker
Klipsch	RS-7		Reference Surround Speaker
Klipsch	RSW-10		Reference Subwoofer
Linn	5101 Personal Handset		Universal learning remote

Enhancement: Contacts/Entities: *Go Directly to Project & Completed Invoices*

You can now go directly to any Project Purchase Order, Work Order or Sales Invoices for a Contact.

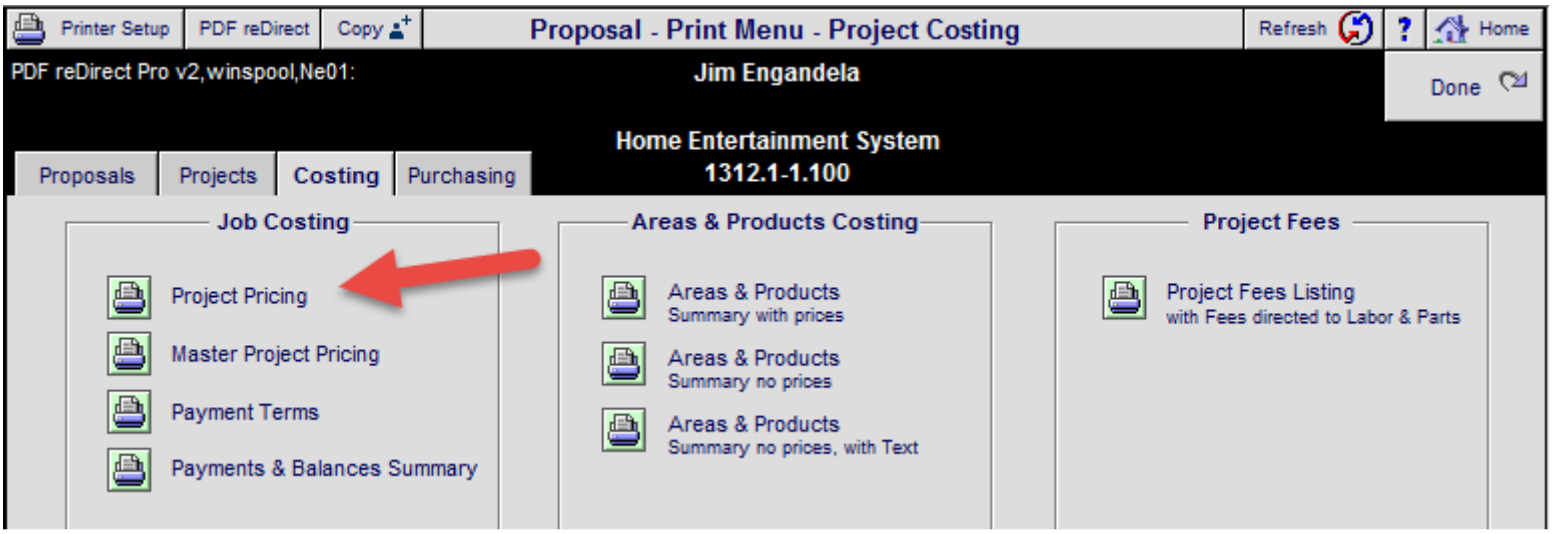


Clicking on the Done button in the Invoice will return you to the Contact Entity screen.



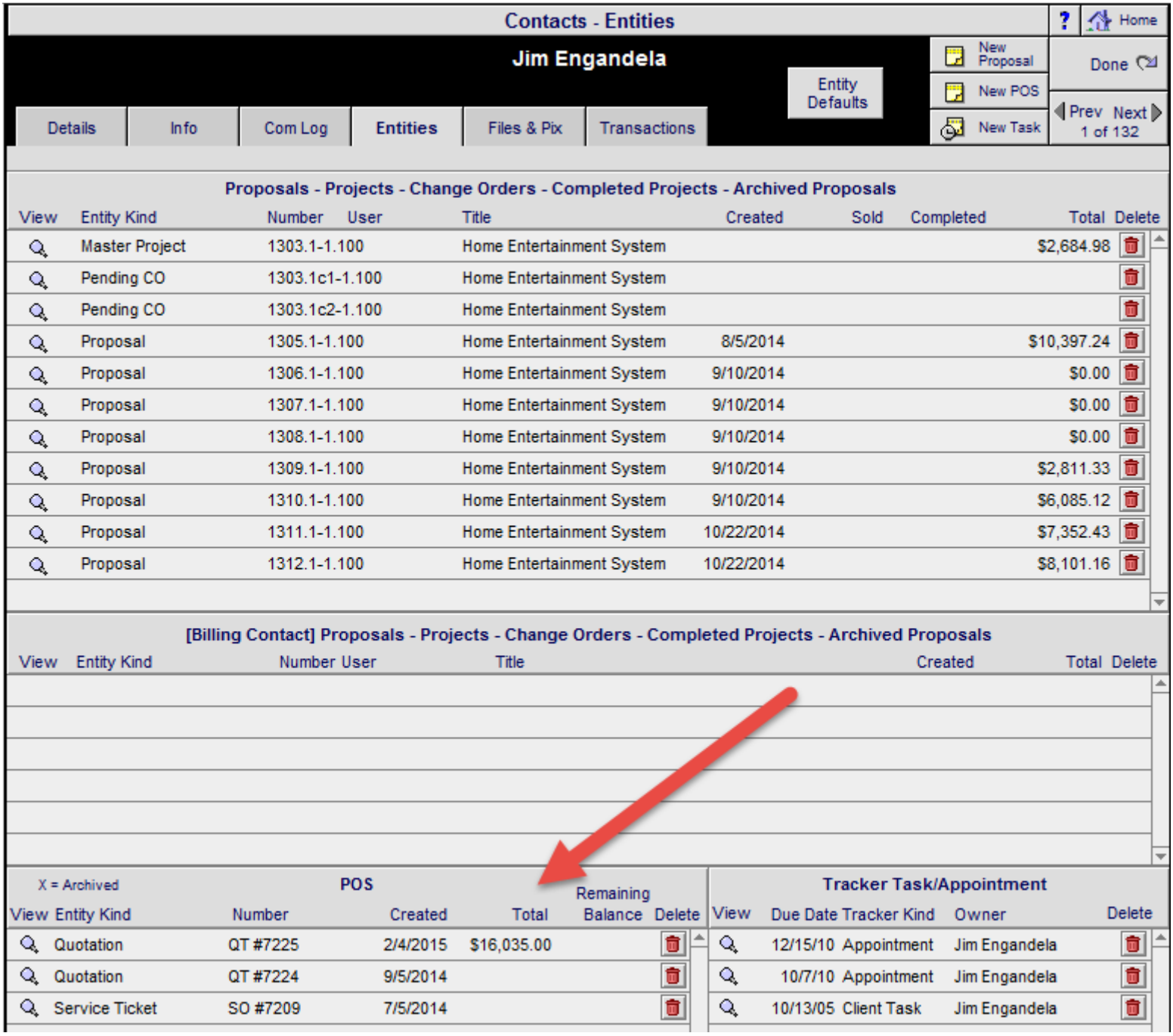
Fix: Proposal/Print Menu/Job Costing: ***Printing the Pricing Report now prints and returns to the Costing screen***

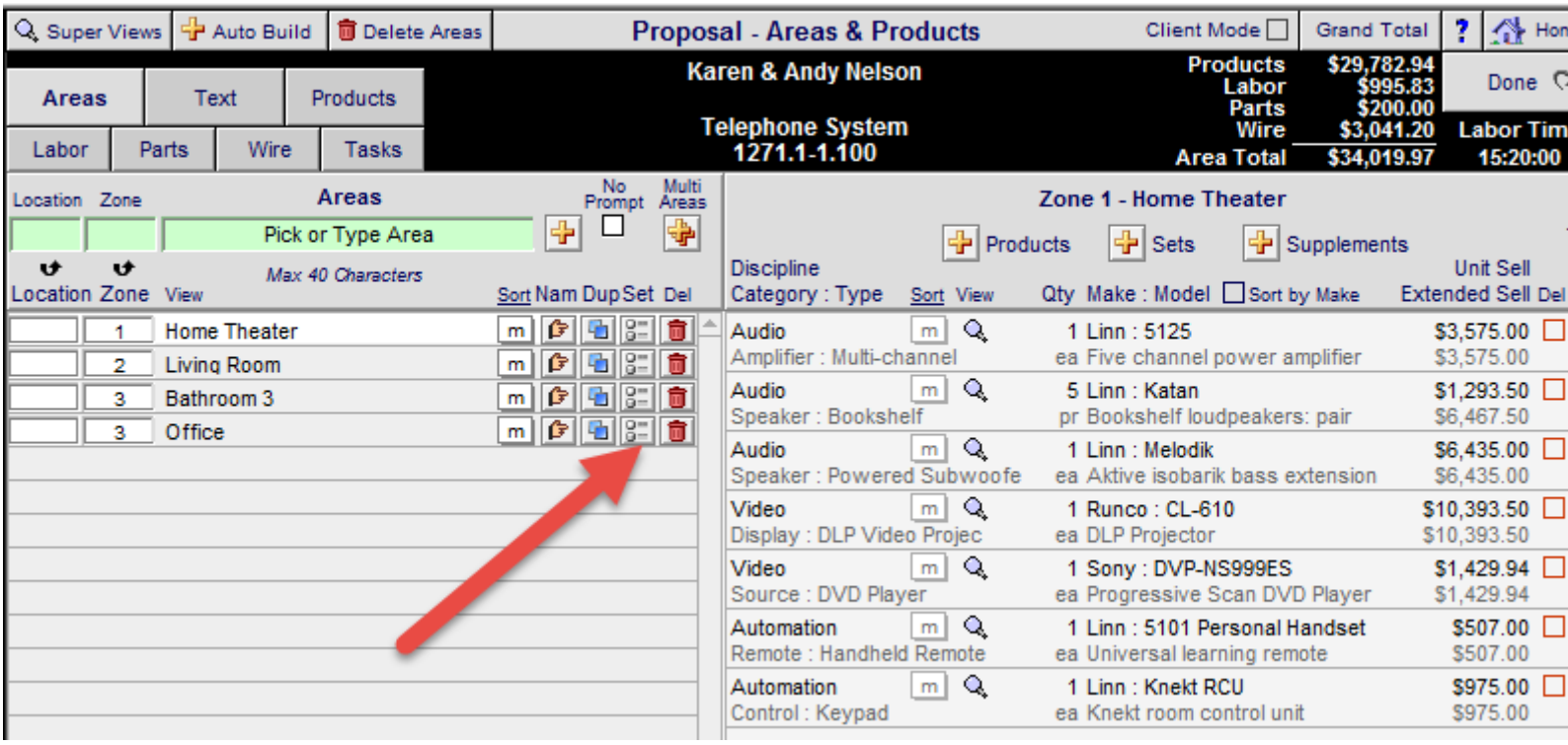
Printing the Pricing Report now prints and returns to the Costing screen.



Fix: Contact/Entities: ***POS Invoice Totals are now Properly Posted to this screen***

When viewing a POS invoice from the Contact Entities screen...the POS Invoice Total displayed in the Entities screen is now updated to the current POS Invoice total.



Fix: Proposal/Areas: *Delete Areas button now does not delete All Areas*

Delete boxes on the Areas portal was deleting all Areas if that Area was renamed. This has been corrected.