



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

The screenshot shows the "Master Prefs - POS Defaults" window. At the top, there are tabs for "POS 1", "POS 2", "Alternate", and "PS Ticket". The "POS 1" tab is selected. Below the tabs, there is a "POS Options" section. It contains a checkbox for "Override Sort Order" and a checkbox for "Do Not Sort POS Lists screens". Below these, there is a dropdown menu for "POS List screens Sort Order". The dropdown menu is open, showing four options: "Invoice # - Ascending Order", "Invoice # - Descending Order", "Date - Ascending Order", and "Date - Descending Order". The "Date - Descending Order" option is selected. To the right of the dropdown menu, there is a text label "into a POS Invoice". Below the dropdown menu, there are three checkboxes: "Show Product", "Show Print", and "Hide Labor Matrix Detail when Printing all POS Invoices". At the bottom of the "POS Options" section, there are two more checkboxes: "Suppress 'Copy File Name' Notice when Printing" and "Do Not Copy File Name into Memory when Printing".

Find Quote		POS - Quotation List																Print				Home				
All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Sold Quotes		Quotation Archive		Click on Quotation to view 16 Quotations																		Done				
																						Archive				
View	Invoice	Date	Client	Company														Specialist	Amount Sold							
QT #7190	9/29/2005	Proctor, Laura & Robbie	Gen-x Sports Inc.														Robert	22,966.56								
QT #7172	9/22/2005	Proctor, Jamie & Sheryl	Gen-x Sports Inc.															5,447.11								
QT #6991	9/21/2005	Menkes, Peter & Alison															Doug Gilpin	4,180.27								
QT #7149	9/20/2005	Kennedy, Bob															Doug Gilpin	1,044.15								
QT #7138	9/16/2005	Charette, Ginette															Robert	65.49								
QT #7119	9/14/2005	Menkes, Alan															Robert	6,250.23								
QT #7099	9/12/2005	Giampaolo **, Tito & Joeanne	Triple M Metals														Robert	855.00								
QT #7010	8/23/2005	Swadron, Wayne & Nicole	Wayne Swadron Architects															1,974.91								
QT #7008	8/22/2005	Swadron, Wayne & Nicole	Wayne Swadron Architects															3,768.91								
QT #6967	8/15/2005	Glaser, Don & Carol															Robert	11,644.16								
QT #6966	8/15/2005	Sapera, Matthew	M. Sapera Constuction														Robert	1,476.54								
QT #6290	7/12/2005	Kyne, Tracy	Leeward Hedge Funds Inc.														Chad Trude	4,222.62								
QT #7071	9/6/2005	Fleck, David & Yvonne															Robert	10,270.00								
QT #7012	9/6/2005	Swadron, Wayne & Nicole	Wayne Swadron Architects															10,392.15								
QT #7011	9/6/2005	Swadron, Wayne & Nicole	Wayne Swadron Architects															10,316.81								
QT #6230	4/6/2005	Charette, Ginette															Robert	17,009.08								

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	
<div style="display: flex; justify-content: space-between;"> Duplicate Contact Delete Contact </div>		Engandela, Jim						<div style="display: flex; justify-content: space-between;"> Print Menu New Proposal </div>		<div style="display: flex; justify-content: space-between;"> Done Prev Next </div>	
<div style="display: flex; justify-content: space-between;"> Details Info Com Log Entities Files & Pix Transactions </div>								<div style="display: flex; justify-content: space-between;"> New Contact New POS </div>		<div style="display: flex; justify-content: space-between;"> New Task 1 of 132 </div>	

Labels

Category Vendor

Class

Key

ID

Fav ☐

? Create Vendor and Assign Product Makes

Group

Status

Staff

Tickler

Tag ☐

Fav	Print Contact	Company	Account ID	Web Address	Web
<input type="checkbox"/>	<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	

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

Address 1

Address 1:

City

State Zip:

Country

County

Cross Street

Address 2

Address 2:

Cross Street

City

State Zip:

Country

County

Phone Numbers

☒ Home Phone 715-287-3335

☐ Work Phone

☐ Mobile Phone 715-287-3335

☒ Fax 1

☐ Fax 2

ext

ext

ext

ext

ext

Country Code

cc

cc

cc

cc

cc

Favorite Phone (H) 715-287-3335

Favorite eMail

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

Global - Contact Notes

Date Stamp
Print Notes

This Contact 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

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

Find Proposals	Fav A	B	C	25 Proposals												Proposals										Sort	Print	Home		
All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z				
Access Levels			<div></div> <div>User: Dave Dowling - 51 - Level: Administrator Location: 1 - EME Audio & Video Systems</div>																				New Proposal		Leave					
Administrator																							Sale Probability		Projects					
Manager																									Completed					
User																									Archive					
= User Lock = Global Proposal																														
Status	Dup	View	Number	User	Client	Company										Proposal Title										Created	Total	Fav		
			1314.1-1.100		Engandela, Jim											Home Entertainment										11/6/2015	\$0			
			1313.1-1.100		Dowling, Dave											Home Entertainment										11/1/2015	\$2,802			
			1312.1-1.100		Engandela, Jim											Home Entertainment										10/22/2014	\$9,604			
			1311.1-1.100		Engandela, Jim											Home Entertainment										10/22/2014	\$3,435			

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.

Find Products	Replace Data	Product Library - Product Detail										1 of 452	Home												
Update Supplements		Created: 4/6/2006		Crestron		New Product		Done																	
Delete Product		Sell Updated: 8/8/2011		AADS-XM		Duplicate Product		Prev		Next															
		Cost Updated: 8/8/2011		Adagio Audio Distribution System w/ XM Sat Radio Radio Radio																					
		Product is in a Proposal/Project		Audio : Multi-room : Switcher																					
Product	Specs	Pix	PDF	Labor	Parts	Wire	Tasks																		
Make	Crestron	Sell Price																							
Model	AADS-XM	\$2,900.00 ea																							
QB Item-SKU																									
Finish	Black																								
Description	Adagio Audio Distribution System w/ XM Sat Radio Radio Radio																								
Features	2 Sources 1-4: (16) RCA female, Tuner Out-AM/FM: (2) RCA female, Tuner Out-XM: (2) RCA female, Net 1-6: (6) 4-pin 3.5mm detachable terminal blocks, IR Out 1-4: (4) 3.5mm TRS mini-phone jack, IR/Serial port, COM A: (1) DB9 male, bidirectional RS-232 port, Computer: (1) 6-pin RJ11 female, bidirectional RS-232 computer console port, LAN: (1) 8-wire RJ45 w/ 2 LED indicators, Net: (2) 4-pin 3.5mm detachable terminal blocks, Rooms 1-6: (12) 2-pin 7.62mm detachable terminal blocks, power amplifier outputs; XM Ant: (1) SMB, FM Ant: (1) F-type coaxial, AM Ant: (1) 2-pin spring-loaded terminals																								
Keep Make, Model, Description & Features text within field borders																									
Cue Notes																									

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.

	<u>Qty</u>	<u>Ext. Price</u>
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 loudspeakers: 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.

Find Projects	14 Entities - All Projects & Completed	Project Commissions	Printer Setup	Print	Home				
Projects & Completed	Comm - Not Paid		Set No Commission Flag						
Only Projects			Set Paid Commission Flag						
Only Completed	No Comm		Update All Projects to User Comm Rates						
Start Date to End Date			User: Dave Dowling - 51 - Level: Administrator Location: 1 - EME Audio & Video Systems						
<u>Salesman</u>	<u>Commission %</u>	<u>Based on</u>	<u>Overhead %</u>	<u>Commission Amount</u>	<u>Project Number</u>	<u>Client Company</u>	<u>Commission Grand Total</u>	<u>Sold Date</u>	<u>Totals</u>
Dave Dowling					1315.1-1.51	Smith, John & Mary	\$44,845.98		
Equipment	10.0 %	Gross		\$250.00		Home Entertainment System			
Labor	%	Profit		\$0.00		Split Commissions			
Parts	%	Profit		\$0.00		Salesman: Dave Dowling	% =	\$250.00	
Wire	%	Profit		\$0.00		Split with:	% =		
Fees	%	Profit		\$0.00					
Total				\$250.00					
				<input type="checkbox"/> No Commission	Paid <input type="checkbox"/>	Total Commissions		\$250.00	

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

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

Clear All Fields		Find Commissions - Utility		
Enter find criteria and click the Done/Find button				Done Find
				Cancel
				<input type="radio"/> Show Only Projects (Blank) <input type="radio"/> Show Only Completed Projects <input type="radio"/> Show Projects and Completed Projects <input type="checkbox"/> No Commission <input type="checkbox"/> Paid
Salesman	Date Range	Entity Number	Client	Company
	creation date from proposal list Today 11/22/2015			
	Start Date to End Date			

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.

Find Projects

13 Projects - All Projects

Project Commissions

Printer Setup

Print

Home

Show: All Projects

Show: Comm - Not Paid

Show: No Comm

Show: Comm - Paid

EME

audio & video

Set No Commission Flag

Set Paid Commission Flag

Leave

Update All Projects

on User Rates

Start Date

End Date

to

User: Dave Dowling - 51 - Level: Administrator

Location: 1 - EME Audio & Video Systems

Salesman	Commission %	Based on	Gross	Overhead % Profit	Commission Amount	View	Project Number	Client Company	Commission Grand Total	Sold Date	Totals
Dave Dowling				%			1315.1-1.51	Smith, John & Mary		11/20/2015	\$2,907.62
Equipment	10.0 %	Gross	\$1,380.00	\$690.00 =	\$138.00			Home Entertainment System			
Labor	%	Profit	\$710.00	\$335.00 =	\$0.00			Split Commissions			
Parts	%	Profit	\$420.00	\$172.00 =	\$0.00			Salesman: Dave Dowling	% =		\$138.00
Wire	%	Profit	\$192.00	\$132.00 =	\$0.00			Split with:	% =		
Fees	%	Profit	\$96.06	\$50.79 =	\$0.00						
Total			\$2,798.06	\$1,379.79	\$138.00	<input type="checkbox"/> No Commission		Paid <input type="checkbox"/>	Total Commissions		\$138.00

Start Date to End Date		EME Audio & Video Systems - Confidential Report							11/20/2015	
		Sales Commissions							Page 4	
Salesman	Commission %	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			Home Entertainment System		
Labor	10.0 %	Gross	\$689.03	\$311.75 =	\$68.90			Split Commissions		
Parts	10.0 %	Gross	\$210.00	\$86.00 =	\$21.00			Salesman: Jim Engandela	% =	\$667.91
Wire	10.0 %	Gross	\$1,059.40	\$504.40 =	\$105.94			Split with:	% =	
Fees	10.0 %	Gross	\$450.42	\$225.21 =	\$45.04					
Total			\$6,679.10	\$2,734.11	\$667.91	<input type="checkbox"/> No Commission		Paid	<input type="checkbox"/> Total Commissions	\$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			Home Entertainment System		
Labor	10.0 %	Gross	\$7,750.00	\$3,633.33 =	\$775.00			Split Commissions		
Parts	10.0 %	Gross	\$28,150.00	\$11,290.00 =	\$2,815.00			Salesman: Jim Engandela	% =	\$4,745.81
Wire	10.0 %	Gross	\$7,020.00	\$3,240.00 =	\$702.00			Split with:	% =	
Fees	10.0 %	Gross	\$638.10	\$326.85 =	\$63.81					
Total			\$47,458.10	\$20,050.18	\$4,745.81	<input type="checkbox"/> No Commission		Paid	<input type="checkbox"/> Total Commissions	\$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			Home Entertainment System		
Labor	10.0 %	Gross	\$675.00	\$337.50 =	\$67.50			Split Commissions		
Parts	10.0 %	Gross	\$0.00	\$0.00 =	\$0.00			Salesman: Jim Engandela	% =	\$4,007.03
Wire	10.0 %	Gross	\$0.00	\$0.00 =	\$0.00			Split with:	% =	
Fees	10.0 %	Gross	\$1,895.25	\$1,022.63 =	\$189.53					
Total			\$40,070.25	\$20,110.13	\$4,007.03	<input type="checkbox"/> No Commission		Paid	<input type="checkbox"/> Total Commissions	\$4,007.03
Jim Engandela							1303.1-1.10	Engandela, Jim		\$139.98
Equipment	10.0 %	Gross	\$2,500.00	\$1,250.00 =	\$250.00			Home Entertainment System		
Labor	10.0 %	Gross	\$45.00	\$22.50 =	\$4.50			Split Commissions		
Parts	10.0 %	Gross	\$0.00	\$0.00 =	\$0.00			Salesman: Jim Engandela	% =	\$267.14
Wire	10.0 %	Gross	\$0.00	\$0.00 =	\$0.00			Split with:	% =	
Fees	10.0 %	Gross	\$126.35	\$68.18 =	\$12.64					
Total			\$2,671.35	\$1,340.68	\$267.14	<input type="checkbox"/> No Commission		Paid	<input type="checkbox"/> Total Commissions	\$267.14
Jim Engandela Total Commissions										\$44,595.98
Grand Total Commissions										\$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.

Delete all Tasks		Project Tracker - Install Phase Milestones				Sold Date: 2-9-2015	? Home
Mike & Jessica Potter							
Install Phases		Payments	Project Tasks	1272.1-1.100			
Install Phase Milestones							
New-3 Phase Pre-Trim-Final							
Hide	Done	Done Date	Phase	Real Date	Phase Date	Install Milestones	Owner

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.

Print Setup Delete Ticket Add New		POS - Project Ticket		Home	
Print Hide Labor Detail Matrix		Project Ticket PST #7223		Ticket Done <input type="checkbox"/> Contact Done	
Preview				Set Up ◀ Prev Next ▶	

Dennis Goss 567 58TH Street Oakland, CA 94607		Home 715-287-3161 Dorothy 715-287-3347		Project # 1275.1-1.100 Job Contact <input type="text"/> Job Location <input type="text"/> Job Phone <input type="text"/> Salesman <input type="text"/>		Contact Notes (Does not Print) <div style="height: 40px;"></div>	
---	--	---	--	--	--	---	--

Tickets Ticket Type <input type="text" value="New"/> Ticket Status <input type="text" value="Pending Scheduling"/> Billing Status <input type="text" value="New"/>		Assignments Tech <input type="text" value="Jim and Fred"/> Prev Tech <input type="text"/> Project Mgr <input type="text"/>		Appt Requested Date <input type="text"/> Time <input type="text"/>		Ticket Appointment Date <input type="text"/> Time <input type="text"/>	
Warranty & Install Date Warranty Status <input type="text"/> Warranty Date <input type="text"/>		Ticket Creation By: Jim Engandela Date: 7/9/2014		Labor Tracking Allocated Hrs: <input type="text"/> Used Hrs: <input type="text"/> Remaining Hrs: <input type="text"/>		Issue Master Tracker Appointment Requested Installer <input type="text"/> Add Edit/Delete Appointment:	
						Email Notification <input type="checkbox"/> All <input type="checkbox"/> Notify Scheduling <input type="checkbox"/> Notify Sales <input type="checkbox"/> Notify Specific <input type="checkbox"/> Notify Engineering	

Description of Work Requested

Enhancement: POS/Service Ticket: Convert to Sales Invoice

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

Print Setup Delete Ticket Add New		POS - Project Ticket		Home	
Print Hide Labor Detail Matrix		Project Ticket PST #7200		Ticket Done <input type="checkbox"/> Contact Done	
Preview				Convert to Invoice Converted to SI	
Set Up ◀ Prev Next ▶					

LeRoy Asher 567 58TH Street Oakland, CA 94607		Home 715-985-3833		Project # 1288.1-1.100 Job Contact <input type="text"/> Job Location <input type="text"/> Job Phone <input type="text"/> Salesman <input type="text"/>		Contact Notes (Does not Print) Very good, long time customer. Likes classical music and jazz.	
---	--	-------------------	--	--	--	---	--

Tickets Ticket Type <input type="text" value="Contract"/> Ticket Status <input type="text" value="Pending Scheduling"/> Billing Status <input type="text" value="New"/>		Assignments Tech <input type="text"/> Prev Tech <input type="text"/> Project Mgr <input type="text"/>		Appt Requested Date <input type="text"/> Time <input type="text"/>		Ticket Appointment Date <input type="text"/> Time <input type="text"/>	
Warranty & Install Date Warranty Status <input type="text"/> Warranty Date <input type="text"/>		Ticket Creation By: Jim Engandela Date: 6/26/2014		Labor Tracking Allocated Hrs: <input type="text"/> Used Hrs: 0:45 Remaining Hrs: -0:45		Issue Master Tracker Appointment Requested Installer <input type="text"/> Add Edit/Delete Appointment:	
						Email Notification <input type="checkbox"/> All <input type="checkbox"/> Notify Scheduling <input type="checkbox"/> Notify Sales <input type="checkbox"/> Notify Specific <input type="checkbox"/> Notify Engineering	

Description of Work Requested

PST List shows Tickets that have been Converted

Find Tickets Show All Tickets POS - Project Service Tickets

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

Pending Scheduling Type
 Scheduled Billing - New
 Ticket Complete Billing - Released
 Review Complete Done

Show All
 Project Tickets
 Service Tickets

Done

Project - Service Tickets
 12 Tickets

QT SI CO SO WO PO RA PST

Ticket Kind	Ticket #	Ticket Date	Client	Type	Status	Billing	Created By	Appointment
View Done	Project #	Done Date	Company	Converted to SI	Work Requested	Work Done	Technician	
Project	PST #7200	6/26/2014	Asher, LeRoy	Contract	Pending Scheduling	New	Jim Engandela	
	1288.1-1.100			Converted to SI				
Service	PST #7199	6/24/2014	Asher, LeRoy	New	Review Complete	New	Jim Engandela	
					Descript	Descript		

Sales Invoices show PST or Quotation Reference number

Print Setup Delete Add New POS POS - Sales Invoice Converted Ref: QT #7195

Print Hide Labor Detail Matrix
 Preview Packing List Costing

Invoice
 SI #7228 1 of 504

Contact Done
 Set Up Prev Next

Model Address 2: Show Hide

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

Cecilia Christenson
 Wade Realty

11/22/2015

Sales Rep Terms Ship VIA Date Payment Check Number Reference #

Jim Engandela Quotation prices good for 30

Pick Qty unit Pick Price Cue Product Description (max 2 lines) Install (h:m:s) Unit Price Ext Price Tax A B

1	ea	Linn : Classik Music-B : Integrated CD player/tuner/preamp/power amplifier : Blue	0:30:00	1,550.00	1,550.00	T	T
2	ea	Crestron : AADS : Adagio Audio Distribution System : Black	0:45:00	2,500.00	5,000.00	T	T

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

Find Quote POS - Quotation List

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

Quotation Archive Sold Quotes

Click on Quotation to view
 17 Quotations

QT SI CO SO WO PO RA PST

Done

Archive

View Invoice	Date	Client	Company	Specialist	Amount Sold	Archive
QT #7224	9/5/2014	Engandela, Jim		Sandy		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
QT #7190	9/29/2005	Pryde, Laura & Robbie		Robert	22,966.56	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
QT #7172	9/22/2005	Salter, Jamie & Sheryl	Gen-x Sports Inc.		5,447.11	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

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.

SI 2

POS - Find Sales Invoice

Enter all of your desired Find criteria and then click Done

Done

Client

Company

Invoice

Specialst

Invoice Amount

Amount Due

Date Range

Today 11/23/2015

Start Date

to

End Date

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.

POS - Purchase Order

Print Setup Delete Duplicate Add New

Print Store Copy Preview Hide All Costs

OPEN
PO #7193 - 123456789 1 of 11

Vendor: BTX
5 Skyline Drive
Hawthorne, NY 10532
United States

User PO #: 123456789

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

9/29/2005
Open
Need By

Buyer: Tina McKnight

Reference Reference 2 Ship VIA FOB Terms

Receive

Pick	Qty	unit	Product Description (max 2 lines)	Unit Cost	Ext Cost	Qty Rcvd	Qty Open	Qty Divrd
	1	ea	Male D-SUB 9 pin screw terminal connector	15.95	15.95	2	0	5
	1	ea	Female D-SUB 9 pin screw terminal connector	15.95	15.95		1	

POS - P.O. Delivered Quantity

Enter Quantity Delivered and click on Done

Male D-SUB 9 pin screw terminal connector

Enter Quantity Delivered: + - 4

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.

Product Library - Product Detail 386 of 452

Find Products Replace Data

Update Supplements Delete Product

Created: 7/27/2005
Sell Updated: 8/8/2011
Cost Updated: 8/8/2011
Product is Not in a Proposal/Project

Sony
KDF-E55A20
55" 3-LCD Rear Projection HDTV
Video : Display : Rear Projection TV

New Product Duplicate Product

Done Prev Next

Product Specs Pix PDF Labor Part Wire Tasks

Make: Sony
Model: KDF-E55A20
QB Item-SKU:
Finish: Black
Description: 55" 3-LCD Rear Projection HDTV

Sell Price: \$2,799.00 ea

Pick Item

Group: Video : Display : Rear Projection TV
Class: Product
Phase: 3 Final
Status:

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

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

Clear All Fields		Find Commsions - Utility			
Enter find criteria and click the Done/Find button					Done Find
					Cancel
					No Commission <input type="checkbox"/> Paid <input type="checkbox"/>
Salesman	Date Range	Entity Number	Client	Company	
	creation date from proposal list Today 11/22/2015 Start Date <input type="text" value="4/25/2007"/> to End Date <input type="text" value="7/2/2014"/>				

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".

Print Setup		Delete Ticket	Add New	POS - Service Ticket		Ticket Done <input type="checkbox"/>		Contact	Done
Print		<input type="checkbox"/> Hide Labor Detail Matrix		Service Ticket				Set Up	Prev Next
Preview				PST #7222					
Anne Erke 567 58TH Street Oakland, CA 94607 eMail A.E. Erke		Home 414-544-4754		Project # Job Contact Job Location Job Phone Salesman		Contact Notes (Does not Print)			
Tickets		Assignements		Appt Requested		Ticket Appointment			

Print Setup		Delete Ticket	Add New	POS - Project Ticket		Ticket Done <input type="checkbox"/>		Contact	Done
Print		<input type="checkbox"/> Hide Labor Detail Matrix		Project Ticket				Set Up	Prev Next
Preview				PST #7223					
Dennis Goss 567 58TH Street Oakland, CA 94607 eMail		Home 715-287-3161 Dorothy 715-287-3347		Project # 1275.1-1.100 Job Contact Job Location Job Phone Salesman		Contact Notes (Does not Print)			

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

Purchase Orders - All - 2 Products										PO	WO	SI	Home				
Jim Engandela 1312.1-1.100										To Order Back Order		Create PO +		Leave			
Products 2 Global Buy Pkg Off										Auto Set PO Qty		View P.O.'s					
PO Products		PO Parts		PO Wire		Sum		Proj		Orphan							
Phase	Zone - Area	Qty Sold	Delivered	Make : Model	CO#	Updated	Master Cost	Project Cost	Alt-x	Vendor ?	Qty	To Order Qty	Enter PO Qty	Sum Mode - PO Status	Ordered	Recvd to date	B/O
3		1 ea		Klipsch : RC-35		8/8/2011	\$210.00	\$210.00		Klipsch Audio		1					
2		1 ea		Linn : 5101 Personal Handset :		8/8/2011	\$234.00	\$234.00		Linn Products		1					

Make Model Description

Linn : 5101 Personal Handset : SKU : Universal learning remote : Black

Project - Purchase Order - QB Link Not Posted										Post PO	Prev/Next	?			
Link Utility QB Registered FBL 4.1.6										Vendor Address		Ship To Address		Hide Prices	
PO Number 1105 - 1312.1-1.100 User PO # PO Date 7/1/2015										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 2 Query Vendors 3 Print & Post SI 4 Post to Quickbooks 5 Close Link		QuickBooks must be on this computer QB Invoice Number QB Transaction Date 07/01/2015		1312.1-1.100 Jim Engandela Buyer: Joe Buyer Buyer Override: Shipping Method: Best Way PO Terms: PO Notes:		PO Total \$234.00		Receiving Open Auto Receive All PO Items Date Received Received By							
Order Qty	Buy Qty	Make Description	Model SKU	Global Buy Pkg Off	Unit Raw Cost	Ext Raw Cost			Receive	Qty Recvd	Qty Open				
1 ea		Linn	5101 Personal Handset	Black	\$234.00	\$234.00					1 ea				
1 ea		Universal learning	SKU	note:											

PO Number 1105 - 1312.1-1.100		EME Audio & Video Systems Purchase Order		PO Date 7/1/2015	
Vendor: Linn Products 8787 Perimeter Park Blvd. Jacksonville, FL 32216 USA		Account #:		Ship to: EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 567937	
Phone (W) 904-645-5242 Email: patricia@linninc.com		Fax 904-645-7275		Phone 715-287-3335 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
Rovd	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
Patricia Snodgrassx Linn Products						Maps and Directions		Done	
Details	Info	Com Log	Entities	Files & Pix	Transactions				
Date Stamp						Global - Contact Notes		Print Notes	
helpline@linninc.com service@linninc.com orders@linninc.com						Charge Card Card Type Name on Card Card Number Code Expire Date Pay Terms Credit Limit Credit Notes			
<i>This Note is Global and stored in the Contact Library and will appear in every Proposal or Project for this Client</i>									
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 <input checked="" type="checkbox"/>	
Link Utility QB Registered FBL 4.1.6		Vendor Address <input checked="" type="checkbox"/>		Ship To Address <input checked="" type="checkbox"/> Hide Prices <input type="checkbox"/>	
PO Number 1107 - 1312.1-1.100 Show User PO # <input type="text"/> PO Date 7/1/2015		<input type="checkbox"/> PO Number <input type="checkbox"/> User PO# <input type="checkbox"/> Client Name		<div style="text-align: center;"> Linn Products 8787 Perimeter Park Blvd. Jacksonville, FL 32216 USA </div> <div style="text-align: center;"> EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 567937 </div> <div style="text-align: right;"> Done Preview PO </div>	
<div style="border: 1px solid black; padding: 2px;"> Open QuickBooks <small>QuickBooks must be on this computer</small> </div> <div style="border: 1px solid black; padding: 2px;"> Query Vendors <input type="text"/> </div> <div style="border: 1px solid black; padding: 2px;"> Print & Post SI QB Invoice Number <input type="text"/> </div> <div style="border: 1px solid black; padding: 2px;"> Post to Quickbooks QB Transaction Date <input type="text"/> </div> <div style="border: 1px solid black; padding: 2px;"> Close Link 07/01/2015 </div>		Buyer: Joe Buyer Buyer Override: <input type="text"/> Shipping Method: Best Way Vendor Pricing Level: 3 Vendor - Customer ID: 123456 Vendor Payment Terms: 2% Net 10 Days PO Notes: Notes		<div style="text-align: right;"> 1312.1-1.100 Jim Engandela </div> <div style="text-align: center;"> Receiving Open <input checked="" type="checkbox"/> Auto Receive All PO Items </div> Date Received <input type="text"/> Received By <input type="text"/>	
Order Qty Make Model <input type="checkbox"/> Global Buy Pkg Off Unit Ext Buy Qty Description SKU Finish Raw Cost Raw Cost				<div style="text-align: right;"> PO Total \$234.00 </div> <div> Receive Qty Qty View-Edit Recvd Open </div>	
1 ea Linn 5101 Personal Handset Black \$234.00 \$234.00				<div> Receive 1 ea </div>	
1 ea Universal learning SKU note: <input type="text"/>					

PO Number		EME Audio & Video Systems		PO Date	
1107 - 1312.1-1.100				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 (W) 904-645-5242 904-645-7275		Phone Fax 715-287-3335 715-287-4464			
Email: patricia@linninc.com		Email: horizon@triwest.net			
Project Jim Engandela		Special Instructions			
Project Reference: 1312.1-1.10		Notes			
Terms Pricing Level 2% Net 10 Days 3					
Shipping Best Way					
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
Rovd	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.

Find PO's	Global Project - Purchase Orders					Global PO Help ?		Home					
Show All PO's	<div>1. First Make your PO's from within each Project</div> <div>2. Pick the underlined Vendor to Group PO's by Vendor</div> <div>3. UnStage (uncheck) unwanted PO's</div> <div>4. Click on Create Global PO to create a new Group PO</div> <div>5. Choose a Combined Line Item or Separate Line Item PO</div>					Set/Clear Staging		Done					
Show Open PO's						PO's	WO's	Sfs	Create Global PO				
View	Project	SCPS PO	User PO #	QB PO #	Posted Date	Status	Pick Vendor	Global PO Staging	Created	Number	Date	Reprint	
	1298.1-1.100 LeRoy Asher	1110			7/2/2015	Closed	<u>Crestron Electronics, Inc</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	1312.1-1.100 Jim Engandela	1107			7/1/2015	Open	<u>Linn Products</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	1312.1-1.100 Jim Engandela	1108			7/1/2015	Open	<u>Klipsch Audio Technologies</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	1285.1-1.100 Mike & Jessica Potter	1096			8/16/2014	Open	<u>Sony Inc</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	1285.1-1.100 Mike & Jessica Potter	1097			8/16/2014	Open	<u>Monster Cable Products, Inc</u>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>

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

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

Custom Installation & Design 77 North 700 West Hurricane, UT 84737 435-635-0255				INVOICE SI #15310 6/10/2015	
Coalton & Kendra Schaefer			Coalton & Kendra Schaefer		
Sales Rep	Doretta New	Terms	Due upon Receipt	Ship VIA	
Date	Payment	Check Number	Ref #		
Qty	Description	Price	Total		
1 ea	Master Project #2280.4-1 : Underground Ranch House Final	273,902.52	273,902.52		
Payment 1/28/15 \$50,000.00					
Payment 4/16/15 \$150,000.00					
Payment 5/15/15 \$50,000.00					
Line Items:		273,902.52			

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

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

Discipline		Area		Phase		Master Project - Detail by Area 0			Utilities					Home			
Client		Areas		Overviews		John & Mary Smith Home Entertainment System 1284.1-1.100						Pricing		Invoicing		Leave	
Project	Info	Products		Area Text								Payments		Purchasing		Tracker	
Contact	Log	Supplements		Install Notes								Project Fees		Work Orders		Print Menu	
Client Mode <input type="checkbox"/>		Labor Details		Super Views								QV	EV		Wire Manager		Change Orders
Discipline : Category : Type				CO Status		Qty	Make : Model			Description				Area & Product Totals			
Home Entertainment System																	
Zone 1 - Home Theater																42,855.73	
Audio : Amplifier : Multi-channel						1 ea	Linn : 5125			Five channel power amplifier (Black) :				2,750.00			
Audio : Source : CD Player						A c2	1 ea	Linn : Classik Music-S			Integrated CD				1,550.00		
Audio : Speaker : Bookshelf						5 pr	Linn : Katan			Bookshelf loudspeakers: pair : Black				4,975.00			

Client Mode Hide ☐

Project Utility

Home

John & Mary Smith

Done

Home Entertainment System

1284.1-1.100

Project

Export

Admin


Complete this Project

Convert this Project into a Completed Project

Edit Project

Edit this Project

Editing a Project is much safer than Converting it to a Proposal
Click on the Edit Project Button to Edit this Project.
Only Users with Access Rights can do this.

Done 

Reset
Payments

Clear All Payments Made, Dates & Notes from all Change Orders (This Project)

Find Proposals

Fav A

B

C

24 Proposals

Proposals

Sort

Print

Home

All

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Access Levels

Administrator

Manager

User

= User Lock

= Global Proposal

EME

audio & video

User: Jim Engandela - 100 - Level: Administrator

Location: 1 - EME Audio & Video Systems

New Proposal

Proposal Sale Probability

Leave

Projects

Archive

Status	Dup View	Number	User	Client	Company	Proposal Title	Created	Total Fav		
		1289.1-1.100	Christenson, Lee	North American Fly LTD	Home Entertainment	4/26/2007	\$7,871			
		1312.1-1.100	Engandela, Jim		Home Entertainment	10/22/2014	\$8,101			
		1308.1-1.100	Engandela, Jim		Home Entertainment	9/10/2014	\$0			
		1311.1-1.100	Engandela, Jim		Home Entertainment	10/22/2014	\$7,352			


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			<div></div> <div>User: Jim Engandela - 100 - Level: Administrator Location: 1 - EME Audio & Video Systems</div>																								Leave			
Administrator																														
Manager																														
User																														
			= User Lock = Global Proposal																					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			
<input type="checkbox"/>	1289.1-1.100		Christenson, Lee North American Fly LTD	4/26/2007	\$7,871	<input type="checkbox"/>	90%	Dec	Mar	Jun			
<input type="checkbox"/>	1312.1-1.100		Engandela, Jim	10/22/2014	\$8,101	<input type="checkbox"/>	75%	Apr	May	Aug			
<input type="checkbox"/>	1308.1-1.100		Engandela, Jim	9/10/2014	\$0	<input type="checkbox"/>	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:			
<input type="text"/>	<input type="text"/>				
Buyer	Reference 2	Ship VIA	FOB	Terms	
Tina McKnight	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
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.

EME Audio & Video Systems - Confidential Report											
Staging Document - Products											
7/12/2015		Pat Klise Capitol Sales Company						Page 1			
Total Qty		Home Entertainment System									
Sorted by Make-Model		1267.1-1.100									
Phase-Class	Qty	Make-Model-Finish SKU Description Unit Cost-Unit Sell	Ck	InStock	OnOrder	Date	Initial				
2 Trim	3 ea	Creston : AADS : Black	Order	<input type="checkbox"/>							
		Adagio Audio Distribution System	Re'vd	<input type="checkbox"/>							
		\$1,250.00 \$2,500.00	Re'vd	<input type="checkbox"/>							
			Stock	<input type="checkbox"/>							
			Delivered	<input type="checkbox"/>							
#											
3 Final	1 ea	Klipsch : RC-35 : Black Ash	Order	<input type="checkbox"/>							
		Center Channel Speaker	Re'vd	<input type="checkbox"/>							
		\$210.00 \$399.00	Re'vd	<input type="checkbox"/>							
			Stock	<input type="checkbox"/>							
			Delivered	<input type="checkbox"/>							
#											
3 Final	2 ea	Klipsch : RF-35 : Black Ash	Order	<input type="checkbox"/>							
		Reference Tower Speaker	Re'vd	<input type="checkbox"/>							
		\$282.50 \$499.00	Re'vd	<input type="checkbox"/>							
			Stock	<input type="checkbox"/>							
			Delivered	<input type="checkbox"/>							
#											
3 Final	2 ea	Klipsch : RS-7 : Matte Black	Order	<input type="checkbox"/>							
		Reference Surround Speaker	Re'vd	<input type="checkbox"/>							
		\$238.50 \$450.00	Re'vd	<input type="checkbox"/>							
			Stock	<input type="checkbox"/>							
			Delivered	<input type="checkbox"/>							
#											
3 Final	1 ea	Klipsch : RSW-10 : Black Ash	Order	<input type="checkbox"/>							
		Reference Subwoofer	Re'vd	<input type="checkbox"/>							
		\$525.00 \$1,000.00	Re'vd	<input type="checkbox"/>							
			Stock	<input type="checkbox"/>							
			Delivered	<input type="checkbox"/>							
#											
2 Trim	2 ea	Linn : 5101 Personal Handset : Black	Order	<input type="checkbox"/>							
		SKU	Re'vd	<input type="checkbox"/>							
		Universal learning remote	Re'vd	<input type="checkbox"/>							
		\$234.00 \$390.00	Stock	<input type="checkbox"/>							
			Delivered	<input type="checkbox"/>							

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

Print Setup Delete Ticket Add New		POS - Project Service Ticket		Home
Print	Hide Labor Detail Matrix	Service Ticket PST #7225		Ticket Done
Preview				Contact
				Set
Jim Engandela Home 715-287-3335 Mobile 715-287-3335		Project # Job Contact Job Location Job Phone Salesman		Contact Notes (Does not Print)

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.

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

HP Officejet Pro X576dw MFP PCL 6 | **Jim Engandela** | Push Contract Lines | Done

Home Entertainment System
1312.1-1.100

Company Location
Company Location: **1**
EME Audio & Video Systems

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

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

Areas & Products and Supplement Reports - Pricing
Line Item Prices
☒ Product : Ext Sell
☐ Product/Parts/Wire : Ext Sell
☐ Product + Product Labor : Ext Sell
☐ Product/Parts/Wire + Product/Parts/Wire Labor : Ext Sell
☐ Product : Ext List
☐ Hide Sell Price
Option Prices (in Product Description)
☒ Show Sell Price
☐ Do Not Show Option prices
☐ Show as selected Print Option prices
☐ Show Prices regardless of Print Option setting
☐ Show as Installed Products & Supplements
Area SubTotal Prices
☒ Show Area Totals ☐ Hide Area Totals

Product - Line Listing
A1 Make-Model-Description-Finish

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

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

Subtotals
5 Subtotals
5 Subtotals = All 5 Subtotals separate
3 Subtotals = 1 (Products), 2 (Parts + Wire), 3 (Labor + Fees)
2 Subtotals = 1 (Products + Parts + Wire), 2 (Labor + Fees)
1 Subtotal = Combines All and Shows only 1 Subtotal
Fees combined with Labor only show in the Contract
1 SubTotal - Area Label
☐ Equipment
☐ Installation
☐ Misc. Parts
☐ Wire & Cable

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

List Price & Discount
☒ Yes ☐ No Show List Price & Discount

Sales Tax
☒ Yes ☐ No Show Sales Tax
AB Tax Show Tax Totals
☐ Do not include Sales Tax in the Summary Grand Totals

Warranty Terms
☐ Factory ☒ Extended

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

Labor Listing
☐ Do not show Labor Hours on Proposal Reports

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

Product Library - AlphaFind by Make = C																								
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
ate Groups	Control4 Pick Make										Pick Make or Group ↓	Control4 Pick Group										Cancel ↗		
w Groups en Make	🔍 Card Access											🔍 Audio Distribution Amplifier												
	🔍 CE Labs											🔍 Audio Distribution Matrix Switch												
	🔍 CES											🔍 Audio Source Streamer												
	🔍 Control4											🔍 Automation Control Accessory												
	🔍 Crestron											🔍 Automation Control Controller												
												🔍 Automation Control Handheld Remote Control												
												🔍 Automation Control Keypad												
												🔍 Automation Control Keypad												
												🔍 Automation Control Smart Thermostat												
												🔍 Automation Control Touchpanel												
de products en Make												🔍 Furniture Rack Mount Accessory												
												🔍 Lighting Control Dimmer / Switch												
												🔍 Lighting Control Wall Plate												
												🔍 Video Distribution Matrix Switch												
												🔍 Video Distribution Matrix Switch												
												🔍 Video Distribution Matrix Switch												
												🔍 Video Distribution Matrix Switch												
												🔍 Video Distribution Matrix Switch												
												🔍 Video Distribution Video Extender												

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.


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

HP Officejet Pro X576dw MFP PCL 6 | **Jim Engandela**

Home Entertainment System
1313.1-1.100

Push Contract Lines | Done

Company Location



Company Location

1

EME Audio & Video Systems

Contract

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

Subtotals

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 SubTotal - Area Label

☒ Equipment
☐ Installation
☒ Misc. Parts
☐ Wire & Cable

Includes: Equipment Misc. Parts

Areas & Products Report - Formatting

☒ Yes ☐ No Page Break after each Area

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

Areas & Products and Supplement Reports - Pricing

Line Item Prices

☒ Product : Ext Sell
☐ Product/Parts/Wire : Ext Sell
☐ Product : Product Labor : Ext Sell

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.

Installation Type

New-3 Phase
Pre-Trim-Final

Payment Method

Percentage

Payment Labels	Payment Steps				
	Deposit	Step 1 Payment	Step 2 Payment	Step 3 Payment	Holdback
	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

Payment Step Director				Phase 1 Total \$	Phase 2 Total \$	Phase 3 Total \$
	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		
				Proposal \$25,342.24 - Payments \$25,342.24 Difference Must = \$0 \$0.00		

Edit CO Payments

Payment Description	Deposit	Payment 1	Payment 2	Payment 3	Holdback	Total Project/CO Payment
Pymt Date Due		Due 10 days before the installation final phase	Due 10 days before the installation trim phase.	Due 10 days before the installation final phase		
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
1 Paymt Amt Made	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Pymt Invoice
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

Admin Edit Payments	Project Edit	Project - Payment Summary				Refresh	Print	?
Edit Payment Plans		EME Audio & Video Systems Whole House Music System 1286.1-1.100				View All CO Payments for this Project	Done	View Project Invoices
<input type="checkbox"/> Override Warnings								
Installation Type New-3 Phase Pre-Trim-Final								
Original Project Payments <i>Enter Payments into "Payment Steps" or "Total CO Payment", but not both. Then click "Add" button to Create the Invoice</i>								
Payment Due Description	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.	Hold Back Due at the completion of the installation.	Total Payments		
Pymt Date Due								

Admin Edit Payments	Clear All Manual Payments	Project - Payment Terms				Print	?																												
Dealer Payment Plans	EME Audio & Video Systems Whole House Music System 1286.1-1.100				Installation Type New-3 Phase Pre-Trim-Final																														
Installation Type  Reset New-3 Phase Pre-Trim-Final		Project Edit		Payment Method Percentage																															
Payment Labels Payment Description Percentage Total: 100% Total Payments: \$0.00		Payment Steps																																	
		Deposit Deposit Due when the proposal is accepted and signed.	Step 1 Payment Payment 1 Due 10 days before the installation prewire phase.	Step 2 Payment Payment 2 Due 10 days before the installation trim phase.	Step 3 Payment Payment 3 Due 10 days before the installation prewire phase.	Holdback Hold Back Due at the completion of the installation.																													
		10 %	30 %	20 %	30 %	10 %																													
		Amount \$0.00	Amount \$0.00	Amount \$0.00	Amount \$0.00	Amount \$0.00																													
Payment Step Director <table border="1"> <thead> <tr> <th></th> <th>Step 1</th> <th>Step 2</th> <th>Step 3</th> </tr> </thead> <tbody> <tr> <td>Payment Director</td> <td>1</td> <td>2</td> <td>3</td> </tr> <tr> <td>Products</td> <td>1</td> <td>2</td> <td>3</td> </tr> <tr> <td>Labor</td> <td>1</td> <td>2</td> <td>3</td> </tr> <tr> <td>Parts</td> <td>1</td> <td>2</td> <td>3</td> </tr> <tr> <td>Wire</td> <td>1</td> <td>2</td> <td>3</td> </tr> <tr> <td>Fees</td> <td>1</td> <td>2</td> <td>3</td> </tr> </tbody> </table>			Step 1	Step 2	Step 3	Payment Director	1	2	3	Products	1	2	3	Labor	1	2	3	Parts	1	2	3	Wire	1	2	3	Fees	1	2	3	Phase 1 Total \$		Phase 2 Total \$		Phase 3 Total \$	
			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																																
Warning: The Proposal Total and the Payment Total must be equal to each other! If Rounding .01 Off: Check Master Prefs Install Types and Global Proposal Price Adjuster Try adding .005 to a Payment						Totals  Reset Payments Proposal \$17,665.66 - Payments \$0.00 Difference Must = \$0 \$17,665.66																													

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.

Edit Group Wire
Product Library - Wire & Cable Supplements
3 of 13
? Home

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

Done
Prev
Next

Product
Specs
Pix
PDF
Labor
Parts
Wire
Tasks

Group Assigned Wire & Cable
☒ Do not use Group Wire

Class	Bulk Run Type	No Labor	Default Qty	Unit	Make	Model	Description	Phase	Unit Price	Ext Price
Bulk	Home	<input type="checkbox"/>	60 ft		Monster	16/2 Spkr Wire	2 Conductor Speaker	1	0.45	27.00
Bulk	Room	<input type="checkbox"/>	60 ft		Monster	MVQUAD-B DB EZ500	RG6 Direct Burial	1	1.80	108.00
Pre-Cut		<input type="checkbox"/>	2 pr		Linn	Black Interconnect	Pair of phono-phono	3	120.00	240.00

Make

Model

Class

Bulk Run Type

No Labor

Room Lab Qty ?

Default Qty

Unit

Bulk	Home	<input type="checkbox"/>	<input type="checkbox"/>	60	M
Bulk	Room	<input type="checkbox"/>	<input type="checkbox"/>	10	ft
Pre-Cut		<input type="checkbox"/>	<input type="checkbox"/>	6	pr

Message

For Room Run Wires Types, checking Room Qty will set the Wire Qty to the Proposal Room Run Qty and override the Default Qty shown here.

OK

Total Group Price

\$375.00

Phase	Unit Price	Ext Price
1	5.00	300.00
1	0.45	4.50
3	120.00	720.00

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									<div>Send Email </div> <div><input type="checkbox"/> Client <input type="checkbox"/> Manager <input type="checkbox"/> Salesman <input type="checkbox"/> Engineer</div>																																																																													
Proposals									Projects									Costing									Purchasing									Home Entertainment System 1312.1-1.100									Done						Prefs						Print Options																																						
Main Proposal																								Proposal Summaries																								Proposal Supplements																																															
Print All Sections																								Print All Sections																								Print All Sections																																															
Proposal Sections																								Proposal Summary																								Supplements																																															
Cover Page																								Discipline																								Labor Summary																																															
Client Intro																								Area																								Labor Detail List																																															
Shop Info																								Phase																								Parts Summary																																															
Overviews																								Sub Total Summary																								Parts Detail List																																															
Areas & Products																								Discipline																								Wire & Cable Summary																																															
A&P No Area Text																								Area																								Wire & Cable Detail List																																															
A&P No Qty Sums																								Phase																								Fees - Directed to Parts																																															
A&P Preliminary Contract * with Area Subtotals, Price Expiry,Pricing Policy and Disclaimer Options																								Grand Total Summary																								Fees - Directed to Labor																																															
Product Summary																								Discipline																								Master Proposal & Supplements																																															
Product Summary with Unit and Ext Totals																								Area																								Discipline																																															
Fees & Services																								Phase																								Area																																															
Contract *																								Product Summary by Discipline																								Products & Only Labor																																															
<input type="checkbox"/> Show 2nd Address																								Product Summary * by Discipline, with Totals																								Products & Supplements without Prices																																															
Extra Text																								<input type="checkbox"/> Hide Grand Totals and Tax																								Area by Phase																																															
																								Subtotal Option: 5 Subtotals																								Phase																																															
Fast Track Cover Page, AP, & Contract																								All User Print Cues																								User Print Cue 1																								User Print Cue 2																							
																								Cutting Edge by Area - No Sum																																																																							

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

		2	3	Purchase Orders - All - 23 Products										PO	WD	SI					
PO Reports & Utilities		John & Mary Smith										To Order		Back Order		Create PO		Leave			
		1284.1-1.100										Products		27		5					
PO Products		PO Part	PO Wire	Sum	Proj	Orphan		Global Buy Pkg Off										Auto Set PO Qty			View P.O.'s
Phase	Zone - Area		Sold		Make : Model		Finish	Alt-x	Vendor ?	Qty	To Order Qty	Enter PO Qty	Sum Mode - PO Status								
	Delivered		CO#		Updated — Master Cost		Project Cost	Avg PO Cost		On Hand			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			2	0		1	1	0						

Setup

Project - PO Reports & Utilities

Mike & Jessica Potter

Home Theater System

1272.1-1.100

Done

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 Purchasing 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 : VC80R	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 <input checked="" type="checkbox"/>		Prev/Next ?	
<input type="checkbox"/> Do not show Client/Project info on PO				Vendor Address <input checked="" type="checkbox"/>		Ship To Address <input checked="" type="checkbox"/>	
PO Number 1103 - 1272.1-1.100 User PO # <input type="text"/> PO Date 5/29/2015				Linn Products 8787 Perimeter Park Blvd. Jacksonville, FL 32216 USA		EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 567937	
Buyer: Joe Buyer Buyer Override: <input type="text"/> Shipping Method: Best Way PO Terms: <input type="text"/>				1272.1-1.100 Mike & Jessica Potter		PO Notes <input type="text"/> PO Total \$234.00	
<input type="checkbox"/> Global Buy Pkg Off				<input checked="" type="checkbox"/> Cost Override		<input type="checkbox"/> Auto Receive All PO Items	
Order Qty	Make	Model	Finish	Unit	Ext	Qty	Qty
Buy Qty	Description	SKU		Raw Cost	Raw Cost	Recvd	Open
1 ea	Linn	5101 Personal Handset	Black	\$234.00	\$234.00		
1 ea	Universal learning	SKU	note: <input type="text"/>				1 ea

PO Number 1103 - 1272.1-1.100		EME Audio & Video Systems		PO Date 5/29/2015																			
Purchase Order																							
Vendor: Linn Products 8787 Perimeter Park Blvd. Jacksonville, FL 32216 USA		Account #:		Ship to: EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 567937																			
Phone (W) 904-645-5242 Email: patricia@linninc.com		Fax 904-645-7275		Phone 715-287-3335 Email: horizon@triwest.net																			
Fax 904-645-7275				Fax 715-287-4464																			
Project Mike & Jessica Potter Project Reference: 1272.1-1.100		Special Instructions																					
Terms Shipping Best Way																							
Buyer Buyer: Joe Buyer Email: horizon@triwest.net																							
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Order Qty</th> <th>Make</th> <th>Model - SKU</th> <th>Finish</th> <th>Cost</th> <th>Ext Cost</th> </tr> </thead> <tbody> <tr> <td>1 ea</td> <td>Linn</td> <td>5101 Personal Handset</td> <td></td> <td>234.00</td> <td>234.00</td> </tr> <tr> <td>Rovd</td> <td>Universal learning</td> <td>SKU</td> <td>Black</td> <td></td> <td></td> </tr> </tbody> </table>						Order Qty	Make	Model - SKU	Finish	Cost	Ext Cost	1 ea	Linn	5101 Personal Handset		234.00	234.00	Rovd	Universal learning	SKU	Black		
Order Qty	Make	Model - SKU	Finish	Cost	Ext Cost																		
1 ea	Linn	5101 Personal Handset		234.00	234.00																		
Rovd	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.

Master Project - Detail by Area				Utilities		Print		Home	
John & Mary Smith				Pricing		Invoicing		Leave	
Home Entertainment System				Payments		Purchasing		Tracker	
1284.1-1.100				Project Fees		Work Orders		Print Menu	
<input type="checkbox"/> Client Mode				<input type="checkbox"/> Labor Details		<input type="checkbox"/> Super Views		<input type="checkbox"/> QV	
Discipline : Category : Type				CO Status		Qty Make : Model		Description	
Home Entertainment System				Area & Product Totals		42,855.73			
Zone 1 - Home Theater				Audio : Amplifier : Multi-channel		1 ea Linn : 5125		Five channel power amplifier (Black) :	
2,750.00				Project Utility		John & Mary Smith		Done	
Home Entertainment System				Project		Export		Admin	
1284.1-1.100				Client Mode Hide <input type="checkbox"/>		?		Home	

Project

Export

Admin

Home Entertainment System
1284.1-1.100**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 		1317.1-1.100																	Done 	
Post to RCMS		Set the Order Location and Deliver Locations if necessary																	Post to RCMS	
Cancel																			Cancel	
Tag Supplements Delete 																				
Order Loc	Deliver Loc	Minor Hold	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 #	
07	07	<input type="checkbox"/>	NCS	Product		3	GRA	Grado	BLACK	Cartridge	\$119.85	T Taxable		3	7/27/2015				100	
07	07	<input type="checkbox"/>	TTU	Product		2	SON	Sony	PSLX350H	Turntable	\$399.9	T Taxable		3	7/27/2015				100	
07	07	<input type="checkbox"/>	TTU	Product		2	SON	Sony	PSLX350H	Turntable	\$399.9	T Taxable		3	7/27/2015				100	
07	07	<input type="checkbox"/>	ERC	Product		1	SON	Sony	TCKA1ESA	Tape deck	\$299.95	T Taxable		3	7/27/2015				100	
07	07	<input type="checkbox"/>	AMI	Part		1	ACO	Audio Control	RACKMOUNTS	Rackmounts	\$24.95	T Taxable		3	7/27/2015				100	
07	07	<input type="checkbox"/>	AMI	Part		3	BOS	Bose	26232	Wall plate	\$149.85	T Taxable		3	7/27/2015				100	
07	07	<input type="checkbox"/>	AMI	Part		2	CAS	Case Logic	MPC1	Mp3 armband case	\$19.98	T Taxable		3	7/27/2015				100	
07	07	<input type="checkbox"/>	APC	Pre-Cut Wire &		2	MON	Monster Cable	GSRB	102555 intcon	\$4	T Taxable		3	7/27/2015				100	
07	07	<input type="checkbox"/>	APC	Pre-Cut Wire &		2	MON	Monster Cable	I10012M	*intcon	\$139.9	T Taxable		3	7/27/2015				100	
07	07	<input type="checkbox"/>	AWI	Bulk Wire & Cable		120	MON	Monster Cable	AUDIODAT	103451	\$240	T Taxable		3	7/27/2015				100	
07	07	<input type="checkbox"/>	AWI	Bulk Wire & Cable		100	MON	Monster Cable	DS350C5EZ1000TA	100998 tan cat-5	\$20	T Taxable		3	7/27/2015				100	
07	07	<input type="checkbox"/>	AWI	Bulk Wire & Cable		50	MON	Monster Cable	MCTS350	103462	\$150	T Taxable		3	7/27/2015				100	
07	07	<input type="checkbox"/>	NQL	Labor	0:00:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	\$0	E Exempt					0	0	0	100	
07	07	<input type="checkbox"/>	NQL	Labor	0:00:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	\$0	E Exempt					0	0	0	100	
07	07	<input type="checkbox"/>	NQL	Labor	0:00:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	\$0	E Exempt					0	0	0	100	
07	07	<input type="checkbox"/>	NQL	Labor	2:00:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	\$120	E Exempt			1	5/28/2015	120	0	0	100	
07	07	<input type="checkbox"/>	NQL	Labor	4:00:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	\$320	E Exempt			2	6/27/2015	0	320	0	100	
07	07	<input type="checkbox"/>	NQL	Labor	6:00:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	\$600	E Exempt			3	7/27/2015	0	0	600	100	
07	07	<input type="checkbox"/>	NQL	Labor	0:30:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	\$25	E Exempt			3	7/27/2015	0	0	25	100	
07	07	<input type="checkbox"/>	NQL	Labor	1:00:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	\$60	E Exempt			3	7/27/2015	0	0	60	100	
07	07	<input type="checkbox"/>	NQL	Labor	0:10:00	FLA	FLA	CUSLAB	CUSTOM INSTALL	\$10	E Exempt			3	7/27/2015	0	0	10	100	
07	07	<input type="checkbox"/>	NQL	Fee		1	FLA	FLA	CUSLAB	CUSTOM INSTALL	\$92.62	E Exempt		1	5/28/2015				100	
07	07	<input type="checkbox"/>	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 addition 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.

Project Utility - Export

Horizon Software

Home

Done

Project

Export

Admin

Home Entertainment System

1317.1-1.100

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

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

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

Tyler - Export this Project
 This utility will export this project and save it in your SCPS folder as a .dbf or .tab file
 Example of file name produced. TylerProjectDataExport.tab

RCMS - Export Project to the RCMS Bookkeeping System
 Make sure your RCMS Master Preferences are set properly first.

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

Show All Show Tags Manage Tags				Proposal - Products				Client Mode <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> ? Home			
Areas		Text		Products		Phases		Mr. & Mrs. Christenson North American Fly LTD Commercial Security System 1280.1-1.100			
Labor		Parts		Wire		Tasks		Auto Price Adjuster			
Update All Products		Delete All Options		Update Tagged Products		Switch Tagged Products		Done			
Zone - Area		Text		Products		Phases		Install Notes			
View Tag		No Discount		Excluded Price		Op Product		Phantom = <input type="checkbox"/>			
1 - Home Theater		1 ea		Linn		5125		80.00			
1 - Home Theater		5 pr		Linn		Katan		287.50			
1 - Home Theater		1 ea		Linn		Melodik		130.00			
1 - Home Theater		1 ea		Runco		CL-610		110.00			

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.

Find Projects		12 Projects - All Projects		Project Commissions		Printer Setup		Print		Home	
Show: All Projects		Show: Comm - Not Paid				Set No Commission Flag		Leave			
Show: No Comm		Show: Comm - Paid				Set Paid Commission Flag		Update All Projects to User Rates			
Start Date		End Date		to		User: Jim Engandela - 100 - Level: Administrator		Location: 1 - EME Audio & Video Systems			
Salesman		Commission %		Based on		Gross		Overhead Profit		Commission Amount	
View		Project Number		Client Company		Sold Date		Totals			
Jim Engandela											
Equipment		8.0 %		Gross		\$12,984.95		\$5,233.55		\$1,038.80	
Labor		4.0 %		Profit		\$578.33		\$268.75		\$10.75	
Parts		6.0 %		Gross		\$105.00		\$43.00		\$8.40	
Wire		7.0 %		Gross		\$1,694.95		\$712.48		\$135.60	
Fees		3.0 %		Profit		\$1,457.45		\$728.72		\$21.86	
Total						\$16,820.68		\$6,986.50		\$1,215.40	
								<input type="checkbox"/> No Commission		Paid <input checked="" type="checkbox"/> Total Commissions	
										\$1,215.40	
Jim Engandela											
Equipment		8.0 %		Gross		\$12,984.95		\$5,233.55		\$1,038.80	
Labor		4.0 %		Profit		\$578.33		\$268.75		\$10.75	
Parts		6.0 %		Gross		\$105.00		\$43.00		\$8.40	
Wire		7.0 %		Gross		\$1,694.95		\$712.48		\$135.60	
Fees		3.0 %		Profit		\$1,457.45		\$728.72		\$21.86	
Total						\$16,820.68		\$6,986.50		\$0.00	
								<input checked="" type="checkbox"/> No Commission		Paid <input type="checkbox"/> Total Commissions	
										\$0.00	
Jim Engandela											
Equipment		8.0 %		Gross		\$3,900.00		\$1,560.00		\$312.00	
Labor		4.0 %		Profit		\$7,750.00		\$3,633.33		\$145.33	
Parts		6.0 %		Gross		\$28,150.00		\$11,290.00		\$2,252.00	
Wire		7.0 %		Gross		\$7,020.00		\$3,240.00		\$561.60	
Fees		3.0 %		Profit		\$638.10		\$326.85		\$9.81	
Total						\$47,458.10		\$20,050.18		\$0.00	
								<input checked="" type="checkbox"/> No Commission		Paid <input type="checkbox"/> Total Commissions	
										\$0.00	

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.

Clear Fields		Find Commsions - Utility			
Enter find criteria and click the Done/Find button					Done Find
					Cancel
					No Commission <input type="checkbox"/> Paid <input type="checkbox"/>
Salesman	Date Range	Entity Number	Client	Company	
	creation date from proposal list Today 4/22/2015				
	Start Date	End Date			
Jim Engandela	4/25/2007 to 4/25/2007	1284.1-1.100	Hawn, Dr.	EME Audio & Video Systems	

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.

Find Products

Fav A

B

C

Show Hidden

Product Library - Line List

Show Makes

Groups

Home

AllA 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

Part

Phantom

Bulk

Cut

All Supplements

Discontinued Products

Utilities

Utility Lists

EME

audio & video

448 Items

451 Total

Phan

Part

Lab

Wire

New Product

Inventory Control

Detail List

Leave

Product Sets

Print Menu

☒ By Make

Show All Groups

Q

Displin

Cat

Type

Class

View

Make

Model : SKU

Description

Finish

Sell Price

<Installed

Cue

Notes

Fav

Hid

Auto Tag

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

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.

Product Library - Line List
☐ Show Makes
 ☒ Groups

448 Items
451 Total

☒ By Make

Q	Displin	Cat	Type	Class	View	Make	Model : SKU	Description	Finish	Sell Price	Cue	Auto Tag
										<Installed	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		
	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																																										
Product Specs Pix PDF Labor Parts Wire Tasks																																																		
Make <input type="text" value="Crestron"/> Sell Price \$260.00 ea Model <input type="text" value="C2N-DB12"/> ? SKU <input type="text"/> Finish <input type="text" value="Specify"/>				Group <input type="text" value="Automation : Control : Keypad"/> Class <input type="text" value="Product"/> Phase <input type="text" value="2 Trim"/>																																														
Description <input type="text" value="Decorator Keypad 12 Button"/>		Status Favorite <input type="checkbox"/> Tax A <input type="text" value="T"/> Phantom Product <input type="checkbox"/> ? Tax B <input type="text" value="T"/> QB Fee SKU <input type="checkbox"/>																																																
Features Do not exceed text boxes Decora, 12 Buttons, Touch Settable ID (TSID) Available Models: A-Almond, B-Black, W-White		Options <table border="0" style="width:100%;"> <tr> <td><u>Product</u></td> <td><u>Proposal</u></td> </tr> <tr> <td>New Item <input type="checkbox"/></td> <td>Sort Order <input type="text" value="m"/></td> </tr> <tr> <td>Discontinued Item <input type="checkbox"/></td> <td>Do not Discount <input type="checkbox"/></td> </tr> <tr> <td>Hide this Item <input type="checkbox"/></td> <td>Hide Printed Price <input type="checkbox"/></td> </tr> <tr> <td>Do not Hide <input type="checkbox"/> ?</td> <td>Issue Staple Up Card <input type="checkbox"/> ?</td> </tr> <tr> <td>Do not Delete <input type="checkbox"/></td> <td>Do not Purchase or Install <input type="checkbox"/> ?</td> </tr> </table>								<u>Product</u>	<u>Proposal</u>	New Item <input type="checkbox"/>	Sort Order <input type="text" value="m"/>	Discontinued Item <input type="checkbox"/>	Do not Discount <input type="checkbox"/>	Hide this Item <input type="checkbox"/>	Hide Printed Price <input type="checkbox"/>	Do not Hide <input type="checkbox"/> ?	Issue Staple Up Card <input type="checkbox"/> ?	Do not Delete <input type="checkbox"/>	Do not Purchase or Install <input type="checkbox"/> ?																													
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Unit <input type="text" value="ea"/>		Product Loading <table border="0" style="width:100%;"> <tr> <td><u>Net Price</u></td> <td>Adjustment Type</td> <td>%</td> <td><u>Loaded Price</u></td> </tr> <tr> <td>List <input type="text"/></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Sell <input type="text" value="\$260.00"/></td> <td></td> <td></td> <td>Sell <input type="text" value="\$260.00"/></td> </tr> <tr> <td>Minimum Sell <input type="text"/></td> <td>GP</td> <td>%</td> <td>Cost <input type="text" value="\$130.00"/></td> </tr> <tr> <td>Net Cost <input type="text" value="\$130.00"/></td> <td></td> <td></td> <td>GP% <input type="text" value="50.0%"/></td> </tr> </table>				<u>Net Price</u>	Adjustment Type	%	<u>Loaded Price</u>	List <input type="text"/>				Sell <input type="text" value="\$260.00"/>			Sell <input type="text" value="\$260.00"/>	Minimum Sell <input type="text"/>	GP	%	Cost <input type="text" value="\$130.00"/>	Net Cost <input type="text" value="\$130.00"/>			GP% <input type="text" value="50.0%"/>	Purchasing <table border="0" style="width:100%;"> <tr> <td> Add POS PO</td> <td>Default PO Vendor <input type="text" value="Crestron Electronics, Inc"/> ?</td> <td>Default PO Cost <input type="text" value="\$130.00"/></td> </tr> <tr> <td>Use Alt <input type="checkbox"/></td> <td>Alternate PO Vendor <input type="text"/> ?</td> <td>Alt PO Cost <input type="text"/> ?</td> </tr> <tr> <td></td> <td>Optional Vendor Hold <input type="text"/> ?</td> <td>Opt PO Cost <input type="text"/> ?</td> </tr> <tr> <td colspan="3">Product Description (Purchase Order) <input type="text"/> ?</td> </tr> <tr> <td>Package Option ?</td> <td>Enable <input type="checkbox"/></td> <td>Global Buy Pkg Off <input type="checkbox"/></td> </tr> <tr> <td>Buy Pkg <input type="text"/></td> <td colspan="2">Buy Pkg Cost <input type="text"/></td> </tr> <tr> <td>Buy Pkg Qty <input type="text"/></td> <td colspan="2">ea Set Cost</td> </tr> </table>				Add POS PO	Default PO Vendor <input type="text" value="Crestron Electronics, Inc"/> ?	Default PO Cost <input type="text" value="\$130.00"/>	Use Alt <input type="checkbox"/>	Alternate PO Vendor <input type="text"/> ?	Alt PO Cost <input type="text"/> ?		Optional Vendor Hold <input type="text"/> ?	Opt PO Cost <input type="text"/> ?	Product Description (Purchase Order) <input type="text"/> ?			Package Option ?	Enable <input type="checkbox"/>	Global Buy Pkg Off <input type="checkbox"/>	Buy Pkg <input type="text"/>	Buy Pkg Cost <input type="text"/>		Buy Pkg Qty <input type="text"/>	ea Set Cost	
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Product & Supplements <table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>■ Product</th> <th>■ Parts</th> <th>■ Wire</th> <th><u>Installed Price</u></th> </tr> </thead> <tbody> <tr> <td>Sell</td> <td>\$260.00</td> <td>\$105.00</td> <td>\$48.00</td> <td>Sell \$413.00</td> </tr> <tr> <td>Labor</td> <td>\$100.00</td> <td>\$25.00</td> <td>\$30.00</td> <td>Labor \$155.00</td> </tr> <tr> <td>Total</td> <td>\$360.00</td> <td>\$130.00</td> <td>\$78.00</td> <td>Total \$568.00</td> </tr> <tr> <td colspan="4">View Product, Parts, Wire & Labor Costs </td> <td>GP% <input type="text" value="49.0%"/></td> </tr> </tbody> </table>											■ Product	■ Parts	■ Wire	<u>Installed Price</u>	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	View Product, Parts, Wire & Labor Costs				GP% <input type="text" value="49.0%"/>																
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View Product, Parts, Wire & Labor Costs				GP% <input type="text" value="49.0%"/>																																														
Inventory Delivery Lead Time <input type="text" value="7"/> Days Quantity On-Hand <input type="text" value="4"/> Optimum Qty <input type="text"/> Order Qty <input type="text" value="0"/>				Cost Value <input type="text" value="\$520.00"/>																																														
Work Orders Alternate Product Listing (Work Order & Wire Mgr) ? <input type="text"/> Permanent - Product Install Notes (Work Order) <input type="text"/>																																																		

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.

Printer Setup

Report Refresh

Final Change Order - Print Menu Options - View

Print All

?

Print CO by Discipline with Supps

Print CO by Area with Supps

Print CO by Phase with Supps

John & Mary Smith

Home Entertainment System

1284.1c3-1.100

Print Change Order

Print Overviews

Print Fees

Done

Other Reports

Printer: PDF reDirect Pro v2,winspool,Ne01:

CO: c3

CO Title: Home Entertainment System

Change Order

Pending CO Title

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

Show Original Area Text

in addition to the CO Area Text

4/25/2007

Report Date - Lock

Areas & Products Report

Yes

No

Page Break after each Area

Products - Do not Sort products by Discipline

Products - Show Product Install Location

Text - Hide Area Text

Text - Show only Area Text - No Products

Product Listing

A1 Make-Model-Description-Finish

Areas & Products Pricing

Show Item Prices

Product : Ext Sell

Product/Parts/Wire : Ext Sell

Product + Product Labor : Ext Sell

Product/Parts/Wire + Product/Parts/Wire Labor : Ext Sell

Product : Ext List

Hide Sell Price

Area Totals

Show Area Totals

Hide Area Totals

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

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

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

1 SubTotal - Area Label

☒ Equipment
☒ Installation
☐ Misc. Parts
☒ Wire & Cable

Includes: Equipment Installation Wire & Cable

Areas & Products and Supplement Reports - Pricing


Line Item Prices

☒ Product : Ext Sell
☐ Product/Parts/Wire : Ext Sell

Proposal/Print Options

Printer Setup
Proposal/Project Prefs - Print Options
? Home
PDF reDirect Pro v2, winspool,Ne01:
Karen Nelson
Done
Push Contract Lines

Company Location



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 SubTotal - Area Label

☒ Equipment
☒ Installation
☒ Misc. Parts
☒ Wire & Cable

Includes: Equipment Installation Misc. Parts Wire & Cable

Areas & Products and Supplement Reports - Pricing

Line Item Prices

☒ Product : Ext Sell
☐ Product/Parts/Wire : Ext Sell

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
Klipsch : RF-35 : Reference Tower Speaker : Black Ash	2 ea	\$1,297.40
Linn : Naim : Floor-standing loudspeakers: pair : Black	1 pr	\$2,405.00
Klipsch : RSW-1 : Reference Subwoofer : Black Ash	1 ea	\$1,300.00
Zone 2 - Living Room		\$15,176.35
<i>Includes: Equipment, Installation, Misc. Parts, Wire & Cable</i>		

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.

Discipline		Area		Phase		Proposal - Detail by Area			Utilities				Home					
Client			Areas		Overviews		Hayes Callahan Home Theater System 1283.1-1.100					Pricing		Invoicing		Leave		
Project		Info	Products		Area Text							Payments		Purchasing		Tracker		
Contact		Log	Supplements		Install Notes							Project Fees		Work Orders		Print Menu		
Client Mode <input type="checkbox"/>		Labor Details		Super Views		QV							Wire Manager		Change Orders		Grand Total	
Discipline : Category : Type							Qty	Make : Model			Description					Area & Product Totals		
Home Theater System																		
Zone 1 - Home Theater																27,146.99		
Audio : Amplifier : Multi-channel							1 ea	Linn : 5125			Five channel power amplifier (Black) :					2,750.01		
Audio : Speaker : Bookshelf							5 pr	Linn : Katan			Bookshelf loudpeakers: pair : Black					4,975.00		
Audio : Speaker : Powered Subwoofer							1 ea	Linn : Melodik			Aktive isobarik bass extension					4,950.00		
Video : Display : DLP Video Projector							1 ea	Runco : CL-610			DLP Projector					7,995.00		
Video : Source : DVD Player							1 ea	Sony : DVP-NS999ES			Progressive Scan DVD Player : Black					1,099.95		
Automation : Remote : Handheld Remote							1 ea	Linn : 5101 Personal Handset			Universal learning remote : Black					390.00		
Automation : Control : Keypad							1 ea	Linn : Knekt RCU			Knekt room control unit : White					750.00		

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		
	Total	\$29,153.60	41.2%	\$17,155.76	\$11,997.84		
	Tax	\$1,493.08					
	Grand Total	\$30,646.68					

Adjust Total Prices
0.00
-0.01

\$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	
	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
Tax	1,493.08	1,493.08	\$1,493.08
Grand Total	\$30,646.68	\$30,646.68	\$30,646.68

Adjustments
0.00 +- Clear

-0.01 +- Clear

Clear All Adjustments

Contract Post Calculated Posted

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.

Printer Setup	PDF reDirect	Copy	Proposal - Print Menu	User Reports	Refresh	?	Home
PDF reDirect Pro v2, winspool, Ne01:			Jim Engandela			Send Email	
			Home Entertainment System 1313.1-1.100			<input type="checkbox"/> Client <input type="checkbox"/> Manager <input type="checkbox"/> Salesman <input type="checkbox"/> Engineer	
Proposals Projects Costing Purchasing						Done	
						Prefs Print Options	

<div style="text-align: center; border-bottom: 1px solid black; margin-bottom: 5px;"> Main Proposal </div> <div style="text-align: center; margin-bottom: 10px;"> Print All Sections </div> <div style="text-align: center; border-bottom: 1px solid black; margin-bottom: 5px;"> Proposal Sections </div> <div style="margin-bottom: 10px;"> Cover Page </div> <div style="margin-bottom: 10px;"> Client Intro </div> <div style="margin-bottom: 10px;"> Shop Info </div> <div style="margin-bottom: 10px;"> Overviews </div> <div style="margin-bottom: 10px;"> Areas & Products </div> <div style="margin-bottom: 10px;"> A&P No Area Text </div> <div style="margin-bottom: 10px;"> A&P No Qty Sums </div> <div style="margin-bottom: 10px;"> A&P Preliminary Contract * <small>with Area Subtotals, Price Expiry, Pricing Policy and Disclaimer Options</small> </div> <div style="margin-bottom: 10px;"> Product Summary </div> <div style="margin-bottom: 10px;"> Product Summary <small>with Unit and Ext Totals</small> </div> <div style="margin-bottom: 10px;"> Fees & Services </div> <div style="margin-bottom: 10px;"> Contract * <input type="checkbox"/> Show 2nd Address </div> <div style="margin-bottom: 10px;"> Extra Text </div>	<div style="text-align: center; border-bottom: 1px solid black; margin-bottom: 5px;"> Proposal Summaries </div> <div style="text-align: center; margin-bottom: 10px;"> Print All Sections </div> <div style="text-align: center; border-bottom: 1px solid black; margin-bottom: 5px;"> Proposal Summary </div> <div style="margin-bottom: 10px;"> Discipline </div> <div style="margin-bottom: 10px;"> Area </div> <div style="margin-bottom: 10px;"> Phase </div> <div style="text-align: center; border-bottom: 1px solid black; margin-bottom: 5px;"> Sub Total Summary </div> <div style="margin-bottom: 10px;"> Discipline </div> <div style="margin-bottom: 10px;"> Area </div> <div style="margin-bottom: 10px;"> Phase </div> <div style="text-align: center; border-bottom: 1px solid black; margin-bottom: 5px;"> Grand Total Summary </div> <div style="margin-bottom: 10px;"> Discipline </div> <div style="margin-bottom: 10px;"> Area </div> <div style="margin-bottom: 10px;"> Phase </div> <div style="text-align: center; border-bottom: 1px solid black; margin-bottom: 5px;"> Product Summary by Discipline </div> <div style="margin-bottom: 10px;"> Product Summary * <small>by Discipline, with Totals</small> </div> <div style="margin-bottom: 10px;"> <input checked="" type="checkbox"/> Hide Grand Totals and Tax </div> <div style="margin-bottom: 10px;"> Subtotal Option: 1 Subtotal </div>	<div style="text-align: center; border-bottom: 1px solid black; margin-bottom: 5px;"> Proposal Supplements </div> <div style="text-align: center; margin-bottom: 10px;"> Print All Sections </div> <div style="text-align: center; border-bottom: 1px solid black; margin-bottom: 5px;"> Supplements </div> <div style="margin-bottom: 10px;"> Labor Summary </div> <div style="margin-bottom: 10px;"> Labor Detail List </div> <div style="margin-bottom: 10px;"> Parts Summary </div> <div style="margin-bottom: 10px;"> Parts Detail List </div> <div style="margin-bottom: 10px;"> Wire & Cable Summary </div> <div style="margin-bottom: 10px;"> Wire & Cable Detail List </div> <div style="margin-bottom: 10px;"> Fees - Directed to Parts </div> <div style="margin-bottom: 10px;"> Fees - Directed to Labor </div> <div style="text-align: center; border-bottom: 1px solid black; margin-bottom: 5px;"> Master Proposal & Supplements </div> <div style="margin-bottom: 10px;"> Discipline </div> <div style="margin-bottom: 10px;"> Area </div> <div style="margin-bottom: 10px;"> Products & Only Labor </div> <div style="margin-bottom: 10px;"> Products & Supplements <small>without Prices</small> </div> <div style="margin-bottom: 10px;"> Area by Phase </div> <div style="margin-bottom: 10px;"> Phase </div>
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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	Done
Home Entertainment System 1313.1-1.100		
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p style="text-align: center;">Company Location</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <div style="text-align: center;"> Company Location <input style="width: 30px; text-align: center;" type="text" value="1"/> EME Audio & Video Systems </div> </div> <p style="text-align: center;">Areas & Products Report - Formatting</p> <p> <input checked="" type="radio"/> Yes <input type="radio"/> No Page Break after each Area </p> <p> <input type="checkbox"/> Products - Do not Sort products by Discipline <input type="checkbox"/> Products - Show Product Install Notes <input type="checkbox"/> Hide Area Text <input type="checkbox"/> Show Area Text - No Products <input type="checkbox"/> Sort Areas by: Zone/Location/Placement/Area Normal Sort = Location/Zone/Placement/Area <input type="checkbox"/> Hide Footer Initials Initials: _____ </p> </div> <div style="width: 50%;"> <p style="text-align: center;">Contract</p> <p> Default <input checked="" type="radio"/> Use Contract 1 Contract 1 <input type="radio"/> Use Contract 2 Contract 2 <input type="radio"/> Use Contract 3 <input type="radio"/> Use Contract 4 <input type="radio"/> Use Contract 5 </p> <p style="text-align: center;">Subtotals</p> <div style="border: 1px solid black; padding: 2px; text-align: center; margin-bottom: 5px;"> 1 Subtotal </div> <p> 5 Subtotals = All 5 Subtotals separate 3 Subtotals = 1 (Products), 2 (Parts + Wire), 3 (Labor + Fees) 2 Subtotals = 1 (Products + Parts + Wire), 2 (Labor + Fees) 1 Subtotal = Combines All and Shows only 1 Subtotal <i>Fees combined with Labor only show in the Contract</i> 1 Area SubTotal Label Includes: Equipment, Installation, Misc. Parts, Wire & Cable </p> </div> </div>		

Home Entertainment System
for Jim Engandela



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.

	<u>Qty</u>	<u>Ext. Price</u>
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 1-4: (4) 4-pin 3.5mm detachable terminal blocks, Rooms 1-6: (12) 2-pin 3.5mm detachable terminal blocks, power amplifier outputs, Ant: (2) IEC 169-2 coaxial, AM Ant: (2) 2-pin spring-loaded terminal	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		Send Email	
			Home Entertainment System 1313.1-1.100		<input type="checkbox"/> Client <input type="checkbox"/> Manager <input type="checkbox"/> Salesman <input type="checkbox"/> Engineer	
Proposals Projects Costing Purchasing					Done	
					Prefs	
					Print Options	

<div style="text-align: center; border-bottom: 1px solid black; margin-bottom: 10px;"> Main Proposal </div> <div style="text-align: center; margin-bottom: 10px;"> Print All Sections </div> <div style="border-bottom: 1px solid black; margin-bottom: 10px;"> Proposal Sections </div> <div style="margin-bottom: 10px;"> Cover Page </div> <div style="margin-bottom: 10px;"> Client Intro </div> <div style="margin-bottom: 10px;"> Shop Info </div> <div style="margin-bottom: 10px;"> Overviews </div> <div style="margin-bottom: 10px;"> Areas & Products </div> <div style="margin-bottom: 10px;"> A&P No Area Text </div> <div style="margin-bottom: 10px;"> A&P No Qty Sums </div> <div style="margin-bottom: 10px;"> A&P Preliminary Contract * <small>with Area Subtotals, Price Expiry,Pricing Policy and Disclaimer Options</small> </div> <div style="margin-bottom: 10px;"> Product Summary </div> <div style="margin-bottom: 10px;"> Product Summary <small>with Unit and Ext Totals</small> </div> <div style="margin-bottom: 10px;"> Fees & Services </div> <div style="margin-bottom: 10px;"> Contract * </div> <div style="margin-bottom: 10px;"> <input type="checkbox"/> Show 2nd Address </div> <div style="margin-bottom: 10px;"> Extra Text </div>	<div style="text-align: center; border-bottom: 1px solid black; margin-bottom: 10px;"> Proposal Summaries </div> <div style="text-align: center; margin-bottom: 10px;"> Print All Sections </div> <div style="border-bottom: 1px solid black; margin-bottom: 10px;"> Proposal Summary </div> <div style="margin-bottom: 10px;"> Discipline </div> <div style="margin-bottom: 10px;"> Area </div> <div style="margin-bottom: 10px;"> Phase </div> <div style="border-bottom: 1px solid black; margin-bottom: 10px;"> Sub Total Summary </div> <div style="margin-bottom: 10px;"> Discipline </div> <div style="margin-bottom: 10px;"> Area </div> <div style="margin-bottom: 10px;"> Phase </div> <div style="border-bottom: 1px solid black; margin-bottom: 10px;"> Grand Total Summary </div> <div style="margin-bottom: 10px;"> Discipline </div> <div style="margin-bottom: 10px;"> Area </div> <div style="margin-bottom: 10px;"> Phase </div> <div style="border-bottom: 1px solid black; margin-bottom: 10px;"> Product Summary by Discipline </div> <div style="margin-bottom: 10px;"> Product Summary * <small>by Discipline, with Totals</small> </div> <div style="margin-bottom: 10px;"> <input checked="" type="checkbox"/> Hide Grand Totals and Tax </div> <div style="margin-bottom: 10px;"> Subtotal Option: 1 Subtotal </div>	<div style="text-align: center; border-bottom: 1px solid black; margin-bottom: 10px;"> Proposal Supplements </div> <div style="text-align: center; margin-bottom: 10px;"> Print All Sections </div> <div style="border-bottom: 1px solid black; margin-bottom: 10px;"> Supplements </div> <div style="margin-bottom: 10px;"> Labor Summary </div> <div style="margin-bottom: 10px;"> Labor Detail List </div> <div style="margin-bottom: 10px;"> Parts Summary </div> <div style="margin-bottom: 10px;"> Parts Detail List </div> <div style="margin-bottom: 10px;"> Wire & Cable Summary </div> <div style="margin-bottom: 10px;"> Wire & Cable Detail List </div> <div style="margin-bottom: 10px;"> Fees - Directed to Parts </div> <div style="margin-bottom: 10px;"> Fees - Directed to Labor </div> <div style="border-bottom: 1px solid black; margin-bottom: 10px;"> Master Proposal & Supplements </div> <div style="margin-bottom: 10px;"> Discipline </div> <div style="margin-bottom: 10px;"> Area </div> <div style="margin-bottom: 10px;"> Products & Only Labor </div> <div style="margin-bottom: 10px;"> Products & Supplements <small>without Prices</small> </div> <div style="margin-bottom: 10px;"> Area by Phase </div> <div style="margin-bottom: 10px;"> Phase </div>
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Areas & Products

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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.

	<u>Qty</u>	<u>Ext. Price</u>
Audio		
Creston : 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 terminal blocks, power amplifier outputs; FM Ant: (2) IEC 169-2 coaxial, AM Ant: (2) 2-pin spring-loaded terminals	1 ea	\$2,500.00
Creston : 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 terminal 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

Discipline

Area

Phase

Client

Project

Contact

Client Mode

Areas

Info

Log

Labor Details

Overviews

Products

Supplements

Super Views

Area Text

Install Notes

QV

Master Project - Detail by Area

John & Mary Smith

Home Entertainment System

1284.1-1.100

Utilities

Pricing

Payments

Project Fees

EV

Wire Manager

Invoicing

Purchasing

Work Orders

Change Orders

Leave

Tracker

Print Menu

Grand Total

Home

Discipline	Category	Type	CO Status	Qty	Make	Model	Description	Area & Product Totals
Home Entertainment System								
Zone 1 Home Theater28,360.73								
Audio	Amplifier	Multi-channel		1 ea	Linn	5125	Five channel power amplifier (Black) :	2,750.00
Audio	Speaker	Bookshelf		5 pr				4,975.00
Audio	Speaker	Powered Subwoofer		1 ea				4,950.00
Video	Display	DLP Video Projector		1 ea				7,995.00
Video	Source	DVD Player		1 ea				1,099.95
Automation	Remote	Handheld Remote		1 ea				390.00
Automation	Control	Keypad		1 ea				750.00
								12,433.75
Audio	Speaker	Center Channel		1 ea	Klipsch	RC-35	Center Channel Speaker - Black Ash	399.00

Message

Entity View

Do you want View to all of the Entities for this Contact?


Yes

Cancel

Contacts - Entities

Done to
Contact Detail

John & Mary Smith

Return to Entity 

Done to
Contact List

[Proposals](#) - [Projects](#) - [Change Orders](#) - [Completed Projects](#) - [Archived Proposals](#)

[illegible]

X = Archived	POS	Remaining
--------------	-----	-----------

POS

Remaining
Balance

 Tracker Task/Appointment |[View Entity Kind](#)

Number

Created

Total

Delete

View

View

Due D

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.

Find Contacts		Replace Data		Contacts - Contact Detail		Print Contact		Printer Setup		Home	
Duplicate Contact		Delete Contact		Potter, Mike & Jessica				Print Menu		New Proposal	
								New POS		Done	
								New Task		Prev Next	
										21 of 23	

Labels											
Category Client		Class		Key		ID		Fav			
Create Vendor and Assign Product Makes		Group		Status		Staff		Tickler		Tag	

		Company		Vendor #		Web Address		Web	
Fav Contact	Print Contact	Title	First Name	Last Name	Info	Email Address		Email	
<input checked="" type="radio"/>	<input checked="" type="radio"/>		Mike & Jessica	Potter		Jessica Robinson			
<input type="radio"/>	<input type="radio"/>		Gavin	Potter					
<input type="radio"/>	<input type="radio"/>		Lydia						
<input type="radio"/>	<input type="radio"/>								
<input type="radio"/>	<input type="radio"/>								
<input type="radio"/>	<input type="radio"/>								
<input type="radio"/>	<input type="radio"/>								
<input type="radio"/>	<input type="radio"/>								
<input type="radio"/>	<input type="radio"/>								

Address 1

Address 1: 567 58TH Street

City: Oakland

State: CA Zip: 94607

Country:

County:

Cross Street:

Address 2

Address 2:

Cross Street:

City:

State: Zip:

Country:

County:

Phone Numbers

Home Phone 715-830-5022 ext CC

Work Phone ext CC

ext CC

ext CC

ext CC

Mobile Phone

Fax 1

Fax 2

Favorite Phone (H) 715-830-5022

Favorite eMail Jessica Robinson

Proposal & POS Entity Label

Mike & Jessica Potter

Mike & Jessica Potter

Second name 1

567 58TH Street

Oakland, CA 94607

Contact Print Merge Label

Mike & Jessica Potter

Mike & Jessica Potter

Second Name 2

567 58TH Street

Oakland, CA 94607

Insert 2nd Contact Name

Second name 1

Insert 2nd Contact Name

Second Name 2

Global - Contact Notes

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



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

Discipline		Area	Phase	Master Project - Detail by Area			Utilities					Home	
Client		Areas	Overviews	John & Mary Smith			Pricing	Invoicing	Leave				
Project	Info	Products	Area Text	Home Entertainment System			Payments	Purchasing	Tracker				
Contact	Log	Supplements	Install Notes	1284.1-1.100			Project Fees	Work Orders	Print Menu				
Client Mode <input type="checkbox"/>		Labor Details	Super Views	QV				EV	Wire Manager	Change Orders	Grand Total		
Discipline : Category : Type				CO Status	Qty	Make : Model	Description			Area & Product Totals			
Home Entertainment System													
Zone 1 - Home Theater											24,872.40		
Audio : Speaker : Bookshelf				5 pr	Linn : Katan		Bookshelf loudpeakers: pair : Black				4,975.00		
Audio : Speaker : Powered Subwoofer				1 ea	Linn : Melodik		Aktive isobarik bass extension				4,950.00		
Video : Display : DLP Video Projector				1 ea	Runco : CL-610		DLP Projector				7,995.00		
Video : Source : DVD Player				1 ea	Sony : DVP-NS999ES		Progressive Scan DVD Player : Black				1,099.95		
Automation : Remote : Handheld Remote				1 ea	Linn : 5101 Personal Handset		Universal learning remote : Black				390.00		
Automation : Control : Keypad				1 ea	Linn : Knekt RCU		Knekt room control unit : White				750.00		
Zone 2 - Living Room											12,433.75		

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

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

Project Utility - Edit Project

John & Mary Smith

Home Entertainment System
1284.1-1.100

Project Edit

Caution! Editing this Project may change the signed Contract

Project Edit

Setting this field to "Edit Project" enables you to change/delete Products and other data. When you leave this Project, the Editing feature will automatically be cancelled.

This log will automatically track users that have edited this Project

Edit Log

3/22/2015 1284.1-1.100 User: Jim Engandela 100
3/22/2015 1284.1-1.100 User: Jim Engandela 100
4/6/2015 8:40:17 1284.1-1.100 User: Jim Engandela 100

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

Super Views

Auto Build

Delete All Areas

Master Project - Areas & Products

Client Mode

Grand Total

John & Mary Smith

Products \$20,159.95
Labor \$1,117.50
Parts \$275.00
Wire \$3,319.95
Area Total \$24,872.40

Done

Home Entertainment System
1284.1-1.100

Labor Time 17:17:30

Project Edit

Zone 1 - Home Theater

Products

Sets

Supplements

Unit Sell

Discipline

Category : Type

Sort

View

Qty

Make : Model

Sort by Make

Extended Sell

Del

Location

Zone

View

Max 40 Characters

Sort

Nam

Dup

Set

Del

1 Home Theater

2 Living Room

4 Dining Room

4 Kitchen

5 Master Bedroom

5 Master Bathroom

5 Linn : Katan

pr Bookshelf loudspeakers

1 Linn : Melodik

ea Aktive isobarik bass extension

1 Runco : CL-610

ea DLP Projector

1 Sony : DVP-NS999ES

ea Progressive Scan DVD Player

1 Linn : 5101 Personal Handset

ea Universal learning remote

1 Linn : Knekt RCU

ea Knekt room control unit

\$995.00

\$4,975.00

\$950.00

\$50.00

\$7,995.00

\$7,995.00

\$1,099.95

\$1,099.95

\$390.00

\$390.00

\$750.00

\$750.00

All Supplements		Delete All Labor		Project Edit		Master Project - Labor Supplements			Phantom Supplement =		Print	?	Home										
Areas		Text		Products		John & Mary Smith						Degree of Difficulty		Done									
Home Entertainment System 1284.1-1.100						1 - Prewire		0%		Labor Details													
						2 - Trim		0%															
						3 - Final		0%															
Labor		Parts		Wire		Tasks		Labor Total:		49:52:30		\$3,102.50											
								Labor Supplements															
Zone - Area		Qty		Make : Model		View Edit		Labor Type		Labor Note		Tax A B		Install Phases		Total Time with DOD (h:m:s)		Hourly Rate		Ext Sell			
								Sort															
1 - Home Theater		1		Linn : 5101 Personal Handset				Programming				T T		3		0:30:00		\$80.00		\$40.00			
1 - Home Theater		1		Linn : 5101 Personal Handset				Wire Labor - Bulk				T T		1		1:15:00		\$60.00		\$75.00			
1 - Home Theater		5		Linn : Katan				Installation				T T		3		1:40:00		\$60.00		\$100.00			
1 - Home Theater		5		Linn : Katan				Wire Labor - Bulk				T T		1		3:07:30		\$60.00		\$87.50			
1 - Home Theater		1		Linn : Knekt RCU				Installation				T T		1,2		1:00:00		\$60.00		\$60.00			
1 - Home Theater		1		Linn : Knekt RCU				Programming				T T		3		0:30:00		\$80.00		\$40.00			
1 - Home Theater		1		Linn : Knekt RCU				Parts Labor				T T		2,3		0:30:00		\$50.00		\$25.00			
1 - Home Theater		1		Linn : Knekt RCU				Wire Labor - Bulk				T T		1,3		1:20:00		\$60.00		\$80.00			

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

Final Change Orders can now be converted into Pending Change Orders

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	Home Entertainment System 1284.1c3-1.100				Payments	Purchasing		Tracker			
Contact	Log	Supplements	Install Notes					Project Fees	Work Orders		Print Menu			
Client Mode <input type="checkbox"/>		Labor Details	Super Views	QV				EV	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

PDF reDirect Pro v2, winspool,Ne01:


Final Change Order Utility
John & Mary Smith
Home Entertainment System
1284.1c3-1.100

[Home](#)
[Done](#)

Admin

Edit CO

Edit this Final Change Order
 Editing 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.
 Only Users with Access Rights can do this.



Convert this Change Order from "Finalized" back to "Pending"
 Editing a Final Change Order is much safer than Converting it to a Pending CO
 Only Users with Access Rights can do this.

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.

Admin Edit Payments
☐ Override Warnings

Final Change Order - Payment Director
John & Mary Smith
Home Entertainment System
1284.1c3-1.100

[Refresh](#) [Print](#) [?](#)
[Done](#)
[View CO Invoices](#)

Installation Type
 New-3 Phase Pre-Trim-Final

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

Payment Steps						Total CO Payment
Payment Description Pymt Due Date	Deposit	Payment 1 Due 10 days before the installation final phase	Payment 2 Due 10 days before the installation trim phase.	Payment 3 Due 10 days before the installation final phase	Holdback	Total CO Payment
1 Paymt Amt Made Enter Payment Amt & Create Invoice Invoice Date: 9/15/2006 Invoice Number: <input type="text"/> Notes: ck 556	Enter Payment Amt & Create Invoice \$1.00 Invoice Date: 9/23/2006 Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Invoice \$1.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Invoice \$1.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Invoice \$1.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Invoice \$1.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Pymt Invoice \$1.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>
2 Paymt Amt Made Enter Payment Amt & Create Invoice Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Invoice \$2.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Invoice \$2.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Invoice \$2.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Invoice \$2.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Invoice \$2.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Pymt Invoice \$2.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>
3 Paymt Amt Made Enter Payment Amt & Create Invoice Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Invoice \$3.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Invoice \$3.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Invoice \$3.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Invoice \$3.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Invoice \$3.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>	Enter Payment Amt & Create Pymt Invoice \$3.00 Invoice Date: <input type="text"/> Invoice Number: <input type="text"/> Notes: <input type="text"/>
CO Payments	\$0.00	-\$571.11	-\$428.33	-\$428.33	\$0.00	-\$1,427.77
-Total Pymts Made	\$6.00	\$6.00	\$6.00	\$6.00	\$6.00	\$36.00
Balance Due	-\$6.00	-\$577.11	-\$434.33	-\$434.33	-\$6.00	-\$1,391.77



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	?
<input type="checkbox"/> Override Warnings		John & Mary Smith					View All CO Payments for this Project		
Installation Type		Home Entertainment System					Done		
New-3 Phase Pre-Trim-Final		1284.1-1.100					View Project Invoices		
Original Project Payments									
<i>Enter Payments into "Payment Steps" or "Total CO Payment", but not both. Then click "Add" button to Create the Invoice</i>									
Payment Description	Deposit	Payment 1	Payment 2	Payment 3	Hold Back	Total Payments			
Pymt Date Due	Due when the proposal is accepted and signed. 7/12/2011	Due 10 days before the installation prewire phase. 7/12/2011	Due 10 days before the installation trim phase. 8/11/2011	Due 10 days before the installation prewire phase. 9/10/2011	Due at the completion of the installation. 9/10/2011				
1 Paymt Amt Made	Enter Payment Amt & Create Invoice \$7,055.98	Enter Payment Amt & Create Invoice \$15,000.00	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Invoice	Enter Payment Amt & Create Pymt Invoice			
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	\$7,056.98	\$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		
<u>Date Sold</u>	<u>Project</u>	<u>Client/Company</u>	<u>Make</u>	<u>Model</u>	<u>Discipline</u>	<u>Type</u>
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	Power
9/12/2006	1284.1-1.100	John & Mary Smith	Klipsch	RSW-10	Audio	Power
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

EME Audio & Video Systems - Confidential Report							
History of Products Sold				Page 1			
3/4/2015							
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.

Update CO Totals		- Current Change Orders				Print	Home
All Change Orders		John & Mary Smith				Add New Change Order to This Project	All Projects This Project
Home Entertainment System		1284.1-1.100					
View	Type	Date Created	CO Number	Change Order Title	CO Total	Pymts Made	View
CO	Status			CO Reference Info			Pymts Balance Due Del
	Pending	9/12/2006	1284.1c1-1.100	Home Entertainment System	\$13,805.86		
	Sent			c1			
	Pending	9/12/2006	1284.1c2-1.100	Home Entertainment System	\$26,492.37	\$890.00	
				c2	This is a field that you can enter any reference text into		
	Final	4/25/2007	1284.1c3-1.100	Home Entertainment System	-\$1,427.78	\$36.00	
				c3			

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		Home Entertainment System 1284.1c3-1.100						Payments		Purchasing		Tracker	
Contact	Log	Supplements		Install Notes								Project Fees		Work Orders		Print Menu	
Client Mode <input type="checkbox"/>		Labor Details		Super Views		QV		Wire Manager		Change Orders		Grand Total					
Discipline : Category : Type				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	
<div> <div>Edit CO</div> <div> Edit this Final Change Order Editing 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. </div> </div>		
<div> <div> Convert this Change Order from "Finalized" back to "Pending" Only administrators have rights to do this. </div> </div>		

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

Update CO Totals

Final Change Order - Current Change Orders

Print

Home

All Change Orders

John & Mary Smith

Home Entertainment System
1284.1-1.100

Add New Change Order to This Project

All Projects

This Project

View	Type	CO	Status	Date Created	CO Number	Change Order Title	CO Reference Info	CO Total	Pymts Made	Pymts	Balance Due	Del
	Pending			9/12/2006	1284.1c1-1.100	Home Entertainment System		\$13,805.86				
			Sent			c1						
	Pending			9/12/2006	1284.1c2-1.100	Home Entertainment System		\$26,492.37	\$890.00			
						c2	This is a field that you can enter any reference text into					
	Final			4/25/2007	1284.1c3-1.100	Home Entertainment System		-\$1,427.78	\$36.00		-\$1,391.77	
						c3						

Message

Caution!! This is a Final Change Order and are part of the Master Project. Deleting cannot be undone.

Final CO's can be "Edited" or Converted into a "Pending" Change Order.

Delete

Cancel

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

Master Prefs - POS Defaults

Home

Done

POS 1

POS 2

Alternate

PS Ticket

POS Options

Override Sort Order

☐ Do Not Sort POS Lists screens

POS List screens Sort Order

☐ Show Product Cue Notes when Picking Products into a POS Invoice

☐ Show Print Dialog when Printing all POS Invoices

☐ Hide Labor Matrix Detail when Printing all POS Invoices

☒ Suppress "Copy File Name" Notice when Printing

☒ Do Not Copy File Name into Memory when Printing

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.

Product Library - AlphaFind by Make = S

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

Update Makes & Groups

Show Product Groups when Picking a Make

☒ Check before Picking Make

Sony

Pick Make

Sonance

Sony

Pick Make or Group

Sony

Pick Group

Video

Display

Plasma TV

Video

Display

TV GT 27 Inch

Video

Source

DVD Player

Video

Source

VCR

Cancel

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										?	Home	
John & Mary Smith										Entity Defaults	New Proposal New POS New Task	Done 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.

Project - Purchase Order Detail										9/12/2006 Post PO	Prev/Next	?
<input type="checkbox"/> Do not show Client/Project info on PO 1										<input checked="" type="checkbox"/> Hide Prices		
PO Number 1076 - 1284.1-1.100 User PO # <input type="text"/> PO Date 9/12/2006				Vendor Address <input checked="" type="checkbox"/> Runco International 2900 Faber Street Union City, CA 94587			Ship To Address <input checked="" type="checkbox"/> EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WA 98147			Done Preview Print & Post		
Buyer: Joe Buyer Buyer Override: <input type="text"/> Shipping Method: Best Way PO Terms: <input type="text"/> PO Comments & Notes: <input type="text"/>				1284.1-1.100 John & Mary Smith			PO Total \$4,797.00			Receiving <input checked="" type="checkbox"/> Auto Receive <input checked="" type="checkbox"/> All PO Items Date Received: <input type="text"/> Received By: <input type="text"/>		
<input type="checkbox"/> Global Buy Pkg Off Order Qty Buy Qty	Make Description	Model	Finish	Cost Override <input type="text"/>	Unit Raw Cost	Ext Raw Cost	<input checked="" type="checkbox"/> Receive <input type="checkbox"/> 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: <input type="text"/>								

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.

Project - All Invoices								?	Home
John & Mary Smith								Done to Contact or Master Project	
Home Entertainment System									
1284.1-1.100									
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

Clear All Manual Payment Amounts

Proposal - Payment Terms

Reset

Print

?

Dealer Payment Plans

Jim Engandela

Done with Update

Home Entertainment System

1309.1-1.100

Installation Type

New-3 Phase Pre-Trim-Final

Installation Type

Reset

New-3 Phase Pre-Trim-Final

Payment Method

Percentage

Payment Labels	Payment Steps				
	Deposit	Step 1 Payment	Step 2 Payment	Step 3 Payment	Holdback
Payment Description	Deposit	Payment 1	Payment 2	Payment 3	Hold Back
	Due when the proposal is accepted and signed.	Due 10 days before the installation prewire phase.	Due 10 days before the installation trim phase.	Due 10 days before the installation final phase.	Due at the completion of the installation.
Percentage Total: 100%	10 %	30 %	20 %	30 %	10 %
Total Payments: \$2,811.33	Amount \$281.13	Amount \$843.40	Amount \$562.27	Amount \$843.40	Amount \$281.13

Payment Step Director

Step 1

Step 2

Step 3

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

Phase 1 Total \$

Phase 2 Total \$

Phase 3 Total \$

Totals

Reset

Proposal	\$2,811.33
- Payments	\$2,811.33
Difference Must = \$0	\$0.00

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.

Print Setup		Delete	Duplicate	Add New	POS - Purchase Order		<input type="button" value="Home"/> <input type="button" value="Help"/>	
Print		Store Copy		OPEN PO #7193 - 123456789				<input type="button" value="Contact"/> <input type="button" value="Done"/>
Preview		Hide All Costs		1 of 12				<input type="button" value="Set Up"/> <input type="button" value="Prev"/> <input type="button" value="Next"/>
Vendor:		User PO #:		123456789		Ship To:		Shop Warehouse:
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		9/29/2005 Open Need By		
Buyer		Reference		Reference 2		Ship VIA		FOB
Tina McKnight								Terms
								Receive All
Pick	Qty	unit	Product Description (max 2 lines)				Unit Cost	Ext Cost
<input type="checkbox"/>	1	ea	Male D-SUB 9 pin screw terminal connector				15.95	15.95
<input type="checkbox"/>	1	ea	Female D-SUB 9 pin screw terminal connector				15.95	15.95
								Qty Rcvd
								Qty Open
								Qty Delvd

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.

Check All	UnCheck All	User Access Rights		Sort Users	Prev/Next	<input type="button" value="Home"/> <input type="button" value="Help"/>
User Assignable Favorites <input type="checkbox"/> Empty = "Global" Fav's		No "Add Product" Prompt <input type="checkbox"/> ?		Jon Oster Sales Manager Checked boxes have Access Rights Unchecked boxes do not have Rights		PC Screen Size Computer ?
						Screen Magnification 100%
Module/Screen Access <input checked="" type="checkbox"/> Preferences <input type="checkbox"/> Project Manager <input type="checkbox"/> Module Utilities <input type="checkbox"/> Proposal & Project Admin Utility <input type="checkbox"/> Proposal & Project Commissions <input type="checkbox"/> Proposal Custom Print Layouts <input type="checkbox"/> CPS Custom Proposal System access		Access Level User Administrators see all Proposals & Projects Managers see their Proposals & Projects and the users that they manage Users only see their Proposals & Projects		Projects <input type="checkbox"/> Add Change Orders <input type="checkbox"/> Add Purchase Orders <input type="checkbox"/> Add Work Orders <input type="checkbox"/> Add Sales Invoices <input type="checkbox"/> Override Print Menu Prefs & Print Options Project Lockout		
Proposals & Change Orders <input type="checkbox"/> Add <input type="checkbox"/> Archive		Proposals - Projects - Completed Archives - Change Orders <input type="checkbox"/> Delete <input type="checkbox"/> Duplicate		Edit Projects & Final CO's <input type="checkbox"/> Edit Project & Final CO <input type="checkbox"/> Convert Final CO to Pending		
		Convert Proposals - Projects <input type="checkbox"/> Conversions Proposal > Project > Completed		Point of Sale <input type="checkbox"/> Delete/Archive Invoices <input checked="" type="checkbox"/> Invoice Product Sell Price <input type="checkbox"/> Purchase Order Access		

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.

Master Prefs - Taxes
?

1. Create Tax Regions
2. Select a Company Location
3. Assign a Tax Region to Company Location

Done

Company Location - Tax Default

Select a Company	Location	Company	Tax Region Default	Total Tax Rate
	1	EME Audio & Video Systems	Eau Claire	5.000%
	2	Horizon	Menomonie	10.000%

Tax Regions

New Tax Region

Note: Please click on the Set Default icon after changing tax rates

Assign Region to Company Location

Tax Region Name	Location ID	Locale ID	Zip Code	A Tax	+	B Tax	=	Total Tax Rate	Delete
Eau Claire	1	11	54701	4.000 %		1.000 %		5.000%	
			Products	T Taxable		T Taxable			
			Labor	E Exempt		E Exempt			
			Misc Parts	T - Taxable		T Taxable			
			Bulk Wire & Cable	T - Taxable		T Taxable			
			Pre-Cut Wire & Cable	T Taxable		T Taxable			
Menomonie	2	22	54777	7.000 %		3.000 %		10.000%	
			Products	E Exempt		E Exempt			
			Labor	T Taxable		T Taxable			
			Misc Parts	I Installed-taxed on cost		I Installed-taxed on cost			
			Bulk Wire & Cable	I Installed-taxed on cost		I Installed-taxed on cost			
			Pre-Cut Wire & Cable	I Installed-taxed on cost		I Installed-taxed on cost			

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

Jim Engandela

Hardwood Manufacturing

Home Entertainment System

1316.1-1.100

Done

Follow-Up Letters

Info

Contacts

Com Log

Client

Modify or Switch Contact

First Name

Jim

Last Name

Engandela

Company

Hardwood Manufacturing

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@trivest.net

Label

Jim Engandela

Hardwood Manufacturing

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

Tax A

4.000%

Location ID

1

Tax B

1.000%

Locate ID

11

Total Tax

5.000%


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

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.

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.

<input type="checkbox"/> Check All <input type="checkbox"/> UnCheck All		User Access Rights		Sort Users < Prev/Next > ? Home	
User Assignable Favorites <input type="checkbox"/> Empty = "Global" Fav's		Jim Engandela President Checked boxes have Access Rights Unchecked boxes do not have Rights		PC Screen Size Computer Screen ? Screen Magnification 100% Done Commissions	
Module/Screen Access <input checked="" type="checkbox"/> Preferences <input checked="" type="checkbox"/> Project Manager <input checked="" type="checkbox"/> Module Utilities <input checked="" type="checkbox"/> Proposal & Project Admin Utility <input checked="" type="checkbox"/> Proposal & Project Commissions <input checked="" type="checkbox"/> Proposal Custom Print Layouts		Access Level Administrator Administrators see all Proposals & Projects Managers see their Proposals & Projects and the users that they manage Users only see their Proposals & Projects Proposals - Projects - Completed Archives - Change Orders		Projects <input checked="" type="checkbox"/> Add Change Orders <input checked="" type="checkbox"/> Add Purchase Orders <input checked="" type="checkbox"/> Add Work Orders <input checked="" type="checkbox"/> Add Sales Invoices <input checked="" type="checkbox"/> Override Print Menu Prefs & Print Options Project Lockout Edit Projects & Final CO's <input checked="" type="checkbox"/> Edit Project & Final CO	

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

Project Utility - Edit Project		? Home	
John & Mary Smith		Done	
Home Entertainment System		1284.1-1.100	
Project Edit Caution! Editing this Project may change the signed Contract <div>Project Edit Setting this field to "Edit Project" enables you to change/delete Products and other data. When you leave this Project, the Editing feature will automatically be cancelled.</div>			

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.

Super Views

Auto Build

Proposal - Areas & Products

Pat Klise

Capitol Sales Company

Home Entertainment System

1267.1-1.100

Products

Labor

Parts

Wire

Area Total

\$30,409.95

\$1,812.50

\$3,165.00

\$3,431.20

\$38,818.65

Client Mode

Grand Total

Done

Areas

Text

Products

Labor

Parts

Wire

Tasks

Location

Zone

Areas

No Prompt

Pick or Type Area

+

+

Max 40 Characters

Sort

Nam

Dup

Set

Del

Location

Zone

Bedroom 2

0

Servant's Quarters

0

Home Theater

1

Bathroom 2

2

Living Room

2

Office

3

Dining Room

4

Kitchen

4

Master Bathroom

5

Master Bedroom

5

Master Bedroom - 2

5

m

Bedroom 2

Products

Sets

Supplements

Discipline

Category : Type

Sort

View

Qty

Make : Model

Sort

Unit Sell

Extended Sell Del

Audio

Multi-room : Switcher

1

Creston : AADS

ea

Adagio Audio Distribution System

\$2,500.00

Audio

Multi-room : Switcher

2

Creston : AADS

ea

Adagio Audio Distribution System

\$2,500.00

Audio

Multi-room : Keypad

1

Linn : 5101 Personal Handset

ea

Universal learning remote

\$390.00

Audio

Amplifier : Multi-channel

1

Linn : 5125

ea

Five channel power amplifier

\$2,750.00

Audio

Speaker : Bookshelf

5

Linn : Katan

pr

Bookshelf loudspeakers: pair

\$995.00

Audio

Speaker : Powered Subwoofe

1

Linn : Melodik

ea

Aktive isobarik bass extension

\$4,950.00

Video

Display : DLP Video Projec

1

Runco : CL-610

ea

DLP Projector

\$7,995.00

Video

Source : DVD Player

1

Sony : DVP-NS999ES

ea

Progressive Scan DVD Player

\$1,099.95

Automation

Control : Keypad

1

Linn : Knekt RCU

ea

Knekt room control unit

\$750.00

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.

Super Views

Auto Build

Delete Areas

Proposal - Areas & Products

Client Mode

Grand Total

?

Home

Areas

Text

Products

Labor

Parts

Wire

Tasks

Karen & Andy Nelson

Products

\$10,067.19

Labor

\$722.50

Parts

\$105.00

Wire

\$1,218.70

Area Total

\$12,113.39

Done

Labor Time

11:22:30

Telephone System

1271.1-1.100

Location

Zone

Areas

Pick or Type Area

No Prompt

Multi Areas

Location

Zone

View

Sort

Nam

Dup

Set

Del

	1	Home Theater	m				
	2	Living Room	m				
	3	Bathroom 3	m				
	3	Office	m				

Zone 3 - Office

Products

Sets

Supplements

Discipline

Category

Type

Sort

View

Qty

Make

Model

Sort by Make

Unit Sell

Extended Sell Del

Audio	Amplifier	Surround Receive	m		1	Linn	: Classik Movie Di-B	\$5,193.50	
Audio	Speaker	5.1 System	m		1	Linn	: Classik Speaker Package	\$2,925.00	
Video	Display	TV GT 27 Inch	m		1	Sony	: KV-27FS13	\$714.99	

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 Rename

- 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

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 Duplicate

- 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.

Show All			Show Tags			Manage Tags			Proposal - Products										Client Mode <input type="checkbox"/>														
Areas			Text			Products			Phases			Karen & Andy Nelson										Auto Price Adjuster			Update All Products			Delete All Options			Do		
Labor			Parts			Wire			Tasks			Super Views			Telephone System 1271.1-1.100										Update Tagged Products			Switch Tagged Products			Instal		
															Phantom =																		
<u>Zone - Area</u>			Hide			Option			Switch Product			Del			<u>Make</u>			<u>Model</u>			Product Labor			Unit List			Unit Sell						
View			No			Exclude			Printed			Change			Discipline			Category			Parts Labor			Unit Cost			Unit Sell			Ext			
Tag			Discount			Price			Price			Group			Phase			Type			Wire Labor			Updated			GP%			Ext			
1 - Home Theater			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	1 ea	Linn	5125	80.00			1,650.00			2,750.00			3,575.00									
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>		Audio	Amplifier	Five channel power			480.00			8/8/2011			53.8%									
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>		3 Final	Multi-channel	Silver																		
1 - Home Theater			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	5 pr	Linn	Katan	287.50			597.00			1,293.50												
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>		Audio	Speaker	Bookshelf loudspeakers:			205.50			8/8/2011			53.8%									
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>		3 Final	Bookshelf	Black																		
1 - Home Theater			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	1 ea	Linn	Melodik	130.00			2,970.00			6,435.00												
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>		Audio	Speaker	Aktive isobarik bass			95.00			8/8/2011			53.8%									
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>		3 Final	Powered Subwoofer	Black			318.75															
1 - Home Theater			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	1 ea	Runco	CL-610	110.00			4,797.00			10,393.50												
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>		Video	Display	DLP Projector			99.95			8/8/2011			53.8%									
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>		3 Final	DLP Video Projector																			

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
- ☐ B Tax Show Tax Totals
- ☒ Include Sales Tax in the Summary Grand Totals

Update Existing
Proposals &
Pending CO's



Printer Setup

Proposal/Project Prefs - Print Options

Home

PDF reDirect Pro v2, winspool, Ne01:

Jim Engandela

Push Contract Lines

Done

Home Entertainment System
1305.1-1.100

Company Location

Company Location

 EME Audio & Video Systems

Areas & Products Report - Formatting

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

Areas & Products and Supplement Reports - Pricing

Line Item Prices
☒ Product : Ext Sell
☐ Product/Parts/Wire : Ext Sell
☐ Product + Product Labor : Ext Sell
☐ Product/Parts/Wire + Product/Parts/Wire Labor : Ext Sell
☐ Product : Ext List
☐ Hide Sell Price
Option Prices (in Product Description)

Contract

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

Subtotals

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

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

List Price & Discount
☒ Yes ☐ No Show List Price & Discount

Sales Tax
☒ Yes ☐ No Show Sales Tax
 Show Tax Totals
☒ Include Sales Tax in the Summary Grand Totals

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.

Discipline		Area		Phase		Proposal - Detail by Area			Utilities				Home	
Client		Areas		Overviews		Ace Matthews All Creative Enterprises Home Automation 1270.1-1.100			Pricing		Invoicing		Leave	
Project	Info	Products		Area Text					Payments		Purchasing		Tracker	
Contact	Log	Supplements		Install Notes					Project Fees		Work Orders		Print Menu	
Client Mode <input type="checkbox"/>		Labor Details		Super Views							Wire Manager		Change Orders	
Discipline : Category : Type						Qty Make : Model			Description			Area & Product Totals		
Home Automation														
Zone 1 - Home Theater														30,296.49
Audio : Multi-room : Switcher						1 ea	Crestron : AADS-XM			Adagio Audio Distribution System w/			2,900.00	
Audio : Multi-room : Switcher						1 ea	Crestron : AADS-XM			Adagio Audio Distribution System w/			2,900.00	

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 <i>Green Fields are Editable</i>		Done Work Orders
Pick	Zone	1 - Pick Area	Work Order - Overview Install Notes
	1	Home Theater	Installation Work Order Overview Notes
	2	Living Room	
	4	Dining Room	
	4	Kitchen	
	5	Master Bedroom	
	5	Master Bathroom	
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				
<i>Italic Product Notes - Permanent Install Note</i>				
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.

The screenshot shows the 'Contacts - Contact Detail' window for 'Engandela, Jim' at 'Hardwood Manufacturing'. The window is divided into several sections:

- Top Bar:** Includes 'Find Contacts', 'Replace Data', 'Print Contact', 'Printer Setup', and 'Home'.
- Buttons:** 'Duplicate Contact', 'Delete Contact', 'Print Menu', 'New Proposal', 'New POS', 'New Task', 'Done', 'Prev', 'Next', and '1 of 132'.
- Labels:** 'Category' (Vendor), 'Class', 'Key', 'ID', 'Fav', 'Group', 'Status', 'Staff', 'Tickler', and 'Tag'.
- Company Information:** 'Company' (Hardwood Manufacturing), 'Vendor #', 'Web Address', and 'Web'.
- Contact List:** A table with columns: 'Fav', 'Print Contact', 'Title', 'First Name', 'Last Name', 'Info', 'Email Address', and 'Email'. The first row shows 'Jim Engandela' as 'President' with email 'horizon@triwest.net'.
- Address 1:** 'Address 1: 123 Oak Street, Building 5, Suite 1'. Below this are fields for 'City' (Chicago), 'State' (IL), 'Zip' (39287), and 'Country' (USA). A red arrow points to the 'Address 1' field.
- Phone Numbers:** 'Home Phone' (715-287-3335), 'Work Phone', 'Mobile Phone' (715-287-3335), and 'Country Code' (CC).



HOME ENTERTAINMENT SYSTEM

Version 1

Designed and Prepared for

Jim Engandela
Hardwood Manufacturing
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 Preferences/Users/Access Codes/Commission.

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

User Sales Commissions		Sort Users	◀ Prev/Next ▶	? Home												
Jim Engandela President				Done												
Access Rights																
<div style="text-align: center; border-bottom: 1px solid black; margin-bottom: 10px;">Sales Commission Rates for this User</div> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid black;">Commission based on</th> <th style="text-align: left; border-bottom: 1px solid black;">Commission %</th> </tr> </thead> <tbody> <tr> <td> <input checked="" type="radio"/> Profit <input type="radio"/> Gross </td> <td> Equipment <input style="width: 50px;" type="text" value="20"/> % of Profit </td> </tr> <tr> <td> <input type="radio"/> Profit <input checked="" type="radio"/> Gross </td> <td> Labor <input style="width: 50px;" type="text" value="5"/> % of Gross </td> </tr> <tr> <td> <input checked="" type="radio"/> Profit <input type="radio"/> Gross </td> <td> Parts <input style="width: 50px;" type="text" value="20"/> % of Profit </td> </tr> <tr> <td> <input checked="" type="radio"/> Profit <input type="radio"/> Gross </td> <td> Wire <input style="width: 50px;" type="text" value="20"/> % of Profit </td> </tr> <tr> <td> <input type="radio"/> Profit <input checked="" type="radio"/> Gross </td> <td> Fees <input style="width: 50px;" type="text" value="10"/> % of Gross </td> </tr> </tbody> </table> <p style="margin-top: 10px;"> - Shop Overhead <input style="width: 50px;" type="text"/> % added to Total Costs (Commission based on Profit Only) </p> <p style="margin-top: 10px; font-size: 0.9em;"> Commission screens are located in the Proposal, Project and Change Order Pricing/Commissions screens </p> <p style="margin-top: 10px; font-size: 0.8em;"> Commission calculations are intended to provide a general commission estimate only and may not accurately account for individual commission rates or pay plans. </p> <p style="margin-top: 10px; font-size: 0.8em;"> EME Audio & Video Systems accepts no responsibility for paying these commission amounts. </p>					Commission based on	Commission %	<input checked="" type="radio"/> Profit <input type="radio"/> Gross	Equipment <input style="width: 50px;" type="text" value="20"/> % of Profit	<input type="radio"/> Profit <input checked="" type="radio"/> Gross	Labor <input style="width: 50px;" type="text" value="5"/> % of Gross	<input checked="" type="radio"/> Profit <input type="radio"/> Gross	Parts <input style="width: 50px;" type="text" value="20"/> % of Profit	<input checked="" type="radio"/> Profit <input type="radio"/> Gross	Wire <input style="width: 50px;" type="text" value="20"/> % of Profit	<input type="radio"/> Profit <input checked="" type="radio"/> Gross	Fees <input style="width: 50px;" type="text" value="10"/> % of Gross
Commission based on	Commission %															
<input checked="" type="radio"/> Profit <input type="radio"/> Gross	Equipment <input style="width: 50px;" type="text" value="20"/> % of Profit															
<input type="radio"/> Profit <input checked="" type="radio"/> Gross	Labor <input style="width: 50px;" type="text" value="5"/> % of Gross															
<input checked="" type="radio"/> Profit <input type="radio"/> Gross	Parts <input style="width: 50px;" type="text" value="20"/> % of Profit															
<input checked="" type="radio"/> Profit <input type="radio"/> Gross	Wire <input style="width: 50px;" type="text" value="20"/> % of Profit															
<input type="radio"/> Profit <input checked="" type="radio"/> Gross	Fees <input style="width: 50px;" type="text" value="10"/> % of Gross															

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

Global Project Manager		? Home
Sunday February 2, 2015		Done
<div style="text-align: center; border-bottom: 1px solid black;">Costing</div> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">Project Job Costing </div> <div style="text-align: center;">Project Payments </div> <div style="text-align: center;">Proposal Costing </div> </div>		
<div style="text-align: center; border-bottom: 1px solid black;">Project Install Trackers</div> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">Percent of Completion </div> <div style="text-align: center;">Installation Progress </div> <div style="text-align: center;">Install Gantt Chart </div> </div>		
<div style="text-align: center; border-bottom: 1px solid black;">Project Invoices</div> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">Change Orders </div> <div style="text-align: center;">Purchase Orders </div> <div style="text-align: center;">Work Orders </div> <div style="text-align: center;">Sales Invoices </div> </div>		
<div style="text-align: center; border-bottom: 1px solid black;">Product Analysis</div> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">Inventory Control </div> <div style="text-align: center;">Product History </div> </div>		
<div style="text-align: center; border-bottom: 1px solid black;">Statistics & Logs</div> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">WO Installer Log </div> <div style="text-align: center;">User Statistics </div> </div>		
<div style="text-align: center; border-bottom: 1px solid black;">Salesman Project Commissions</div> <div style="text-align: center;">Salesman's Project Commissions </div>		
<div style="text-align: center; border-bottom: 1px solid black;">Export Lists</div> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">Proposal List </div> <div style="text-align: center;">Project List </div> <div style="text-align: center;">Completed List </div> <div style="text-align: center;">Archive List </div> </div>		

Find Salesman		Print	Printer Setup		Project Commissions				Sort					Home
Show All Projects		12 Projects				User Commission Rates are set in Master Prefs for each User. Set them first and then click on Update All Projects >				Leave				
Start Date		End Date		User: Jim Engandela - 100 - Level: Administrator										
1/1/2006		to 2/1/2007		Location: 1 - EME Audio & Video Systems										
<u>Salesman</u>		<u>Commission %</u>	<u>Based on</u>	<u>Gross</u>	<u>Profit</u>	<u>Commission Amount</u>	<u>View</u>	<u>Project Number</u>	<u>Client Company</u>	<u>Sold Date</u>	<u>Totals</u>			
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								
Wire		10.0 %	Gross	\$7,020.00	\$3,240.00 =	\$63.81								
Fees		10.0 %	Gross	\$638.10	\$326.85 =	\$63.81								
Total				\$47,458.10	\$20,050.18	\$4,745.81								
									Spit Commissions					
									Salesman: Jim Engandela	40.0 % =	\$1,898.32			
									Split with: Sandy Engandela	60.0 % =	\$2,847.49			
									Total Commissions		\$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								
Wire		10.0 %	Gross	\$1,059.40	\$504.40 =	\$45.04								
Fees		10.0 %	Gross	\$450.42	\$225.21 =	\$45.04								
Total				\$6,679.10	\$2,734.11	\$667.91								
									Spit Commissions					
									Salesman: Jim Engandela	% =	\$667.91			
									Split with:	% =				
									Total Commissions		\$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 Commissions - Utility		
			Done
Enter find criteria and click the Done/Find button			
Cancel			
Salesman <input type="text" value="Jim Engandela"/>		Date Range creation date from proposal list Today 2/15/2015 Start Date <input type="text" value="8/9/2011"/> to End Date <input type="text" value="3/11/2007"/>	
Entity Number <input type="text"/>			
Client <input type="text"/>		Company <input type="text"/>	
		Title <input type="text"/>	

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	Commission %	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									
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 Commissions			\$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									
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 Commissions			\$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 Manufacturing							
Labor	10.0 %	Gross	\$45.00	\$22.50	=	\$0.00									
Parts	10.0 %	Gross	\$0.00	\$0.00	=	\$0.00									
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 Commissions			\$267.14					
Jim Engandela Total Commissions										\$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.

Find Products

Replace Data

Product Library - Product Detail

35 of 448

Home

Update Supplements

Created: 1/28/2005

Sell Updated: 8/8/2011

Cost Updated: 8/8/2011

Product is Not in a Proposal/Project

Klipsch

RS-35

Reference Surround Speaker

Audio : Speaker : Bookshelf

New Product

Duplicate Product

Done

Prev

Next

Product

Specs

Pix

PDF

Labor

Parts

Wire


Tasks

Make

Klipsch

Sell Price

\$299.00 ea



Model

RS-35

QB Item

Finish

Matte Black

Description

Reference Surround Speaker

Features

These surround speakers deliver crystal-clear sonic detail through the careful placement of two Tractrix® Horn loaded titanium-dome tweeters and one 6.5-inch Cerametallic™ woofer. By aligning the two horns at 90 degrees with respect to each other, along with the front-firing woofer, the speaker smoothly covers a 180-degree horizontal arc, allowing maximum placement flexibility. This unique Wide Dispersion Technology™ brings Reference Series performance to listening areas with less-than-ideal configurations. They come in a black or white vinyl finish and feature a back-panel keyhole for on-wall mounting and a threaded insert for attachment to popular adjustable wall and ceiling brackets.

Cue Notes

Unit

ea

Product

Net Price

List

\$299.00

Sell

\$299.00

Minimum Sell

Net Cost

\$157.50

Loading

Adjustment Type

%

GP

%

\$

Loaded Price

Sell

\$299.00

Cost

\$157.50

GP%

47.3%

Product & Supplements

Product

Parts

Wire

Installed Price

Sell

\$299.00

Labor

\$20.00

Total

\$319.00

Sell

\$164.40

Labor

\$30.00

Total

\$194.40

View Product, Parts, Wire & Labor Costs

GP%

44.8%

Group

Audio : Speaker : Bookshelf

Class

Product

Phase

3 Final

Status

Favorite

Tax A

Phantom Product

Tax B

QB Fee SKU

Options

Product

Proposal

New Item

Sort Order

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

Purchasing

Add POS PO

Default PO Vendor

Klipsch Audio Technologies

Default PO Cost

\$157.50

Use Alt

Alternate PO Vendor

Alt PO Cost

Optional Vendor Hold

Opt PO Cost

Product Description (Purchase Order)

Package Option

Enable

Global Buy Pkg Off

Buy Pkg

Buy Pkg Cost

Buy Pkg Qty

ea

Set Cost

Print Setup Delete Duplicate Add New		POS - Purchase Order		Home	
Print Store Copy		OPEN		Contact Done	
Preview Hide All Costs		PO #7230		1 of 1 Set Up Prev Next	

Vendor:		User PO #:	Ship To: Shop Warehouse:		
Paul Klipsch Klipsch Audio Technologies 3746 Speaker Lane Hope, AK 64763		Home 875-398-9965 Fax: 875-223-8575	EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 567937 Ph: 715-287-3335 Ext: Fax: 715-287-4464 email: horizon@triwest.net		1/9/2015 Open Need By <div style="border: 1px solid black; height: 20px; width: 100px;"></div>

Buyer	Reference	Reference 2	Ship VIA	FOB	Terms	Receive All
Joe Buyer						<input type="checkbox"/>

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.

Fast Find <i>Enter Full or Partial Make, Model, SKU or Description</i>		Clear Find Fields		Product Library - Find Products		<i>Enter Find Info & click Done/Find</i>	
<input type="text"/>		<input type="text"/> Supplier		Update Makes & Groups		<input type="text"/> Install Phase Advanced Find Criteria	
Find Many Makes		Pick Make - Model <i>First Pick a Make, then Model or SKU</i>			Pick Product Group <i>Pick a Discipline, Category, Type or Group</i>		
Make	Model	SKU		Discipline	Category	Type	
Linn	>	or					
Crestron	5101 Personal Handset			Audio	Amplifier	Integrated Amp	
DirectTV	5103 System Controller			Audio	Amplifier	Multi-channel	
EME	5110-W			Audio	Amplifier	Preamplifier	
Klipsch	5125			Audio	Amplifier	Single Channel	
Linn	Adikt			Audio	Amplifier	Stereo	
Middle Atlantic	Akito			Audio	Amplifier	Stereo Receive	
Monster	Akiva			Audio	Amplifier	Surround Proce	
Runco	Aktiv Modules			Audio	Amplifier	Surround Rece	
Sonance	Basik 3			Audio	Control	Multi-channel	
Sony	Basik 3 IR			Audio	Misc	Final Part	
Widget	Basik 3 IR-S			Audio	Misc	Trim Part	
Yamaha	Basik 3 IR-W			Audio	Multi-room	Controller	

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.

<input type="button" value="Check All"/>	<input type="button" value="UnCheck All"/>	User Access Rights		<input type="button" value="Sort Users"/>	<input type="button" value="Prev/Next"/>	<input type="button" value="Home"/>
User Assignable Favorites <input type="checkbox"/> Empty = "Global" Fav's		Jim Engandela President Checked boxes have Access Rights Unchecked boxes do not have Rights		PC Screen Size <input type="text" value="Computer Screen"/>		<input type="button" value="Done"/>
				Screen Magnification <input type="text" value="100%"/>		<input type="button" value="Commissions"/>
Module/Screen Access		Access Level		Projects		
<input checked="" type="checkbox"/> Preferences <input checked="" type="checkbox"/> Project Manager <input checked="" type="checkbox"/> Module Utilities <input checked="" type="checkbox"/> Proposal & Project Admin Utility <input checked="" type="checkbox"/> Proposal & Project Commissions		<input type="text" value="Administrator"/> Administrators see all Proposals & Projects Managers see their Proposals & Projects and the users that they manage Users only see their Proposals & Projects		<input checked="" type="checkbox"/> Add Change Orders <input checked="" type="checkbox"/> Add Purchase Orders <input checked="" type="checkbox"/> Add Work Orders <input checked="" type="checkbox"/> Add Sales Invoices <input checked="" type="checkbox"/> Override Print Menu Prefs & Print Options Project Lockout		

☒ Pricing - Hourly Labor Rates

☒ Product Detail Fields
☒ Labor Detail Fields

☒ Fees - Project screen
☒ Fees - Services screen
☒ Fees - Expenses screen

☒ Add ☒ Delete
☒ Edit
☒ Letter Fields

Product Sets Library
☒ Add ☒ Delete ☒ Duplicate
☒ Edit
☒ Set Fields

☒ Delete

☒ Product Detail Fields (Make, Model etc)
☒ Specifications Fields
☒ Inventory Control Module

AlphaFinder
☒ Show Makes
☒ Show Product Groups

Master Tracker
☒ Delete

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.

☒ 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 ☐ Utility Lists

EME
 audio & video

448 Items
451 Total

Phan Part Lab Wire Detail List Leave Product Sets Print Menu

☐ Show All Groups

Displin	Cat	Type	Class View	Make	Model : SKU	Description	Finish	Sell Price	Cue	Auto Tag
Audio	Multi	Switcher	<input checked="" type="radio"/>	<input checked="" type="radio"/> Crestron	AADS	Adagio Audio	Black	2,500.00 ea	<input type="checkbox"/>	<input type="checkbox"/>
Audio	Multi	Switcher	<input checked="" type="radio"/>	<input checked="" type="radio"/> Crestron	AADS-XM	Adagio Audio	Black	2,900.00 ea	<input type="checkbox"/>	<input type="checkbox"/>
Audio	Multi	Switcher	<input checked="" type="radio"/>	<input checked="" type="radio"/> Crestron	AAE	Adagio Audio	Black	1,800.00 ea	<input type="checkbox"/>	<input type="checkbox"/>
Autom	Contr	Keypad	<input checked="" type="radio"/>	<input checked="" type="radio"/> Crestron	C2N-DB12_	Decorator Keypad 12	Specify	260.00 ea	<input type="checkbox"/>	<input type="checkbox"/>
Autom	Contr	Keypad	<input checked="" type="radio"/>	<input checked="" type="radio"/> Crestron	C2N-DB6_	Decorator Keypad 6	Specify	260.00 ea	<input type="checkbox"/>	<input type="checkbox"/>

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

Product Library - AlphaFind by Make = M

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

☒ Change Make Names ☒ Update Makes & Groups ☐ Cancel

Monster Pick Make

☒ Show Product Groups when Picking a Make
☒ Check before Picking Make

☒ Middle Atlantic
☒ Monster

Monster Pick Group

☒ Wire & Cable Bulk Wire & Cable Interconnect Cable
☒ Wire & Cable Bulk Wire & Cable Speaker Cable
☒ Wire & Cable Pre-Cut Cable Interconnect

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

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 Supplements

Discontinued Products

Utility Lists

Phan

Part

Lab

Wire

Detail List

87 Items

451 Total

New Product

Inventory Control

Leave

Product Sets

Print Menu

Show All Groups

Displin

Cat

Type

Class View

Make

Model : SKU

Description

Finish

Sell Price

Cue

Auto Tag

Wire

Pre-C

Interconnect

Monster

1400MKII-.5M

.5m Interlink 400 Mkl

34.95 ea

Wire

Pre-C

Interconnect

Monster

1400MKII-1M

1m Interlink 400 Mkl

39.95 ea

Wire

Pre-C

Interconnect

Monster

1400MKII-2M

2m Interlink 400 Mkl

49.95 ea

Wire

Pre-C

Interconnect

Monster

1400MKII-4M

4m Interlink 400 Mkl

69.95 pr

Wire

Pre-C

Interconnect

Monster

DVI400-1M : 124728

1m DVI400 Super-High

79.95 ea

Wire

Pre-C

Interconnect

Monster

DVI400-2M : 124729

2m DVI400 Super-High

99.95 ea

Wire

Pre-C

Interconnect

Monster

DVI400-4M : 124730

4m DVI400 Super-High

129.95 ea

Wire

Pre-C

Interconnect

Monster

HDMI400-1M : 123128

1m HDMI400

99.95 ea

Wire

Pre-C

Interconnect

Monster

HDMI400-2M : 123129

2m HDMI400

119.95 ea

Wire

Pre-C

Interconnect

Monster

HDMI400-4M : 123130

4m HDMI400

149.95 ea

Wire

Pre-C

Interconnect

Monster

HDMI400-6M : 123131

6m HDMI400

169.95 ea

Wire

Pre-C

Interconnect

Monster

HDMI400/DVI-1M : 123152

1m Monster 400 HDMI

99.95 ea

Wire

Pre-C

Interconnect

Monster

HDMI400/DVI-2M : 123153

2m Monster 400 HDMI

119.95 ea

Wire

Pre-C

Interconnect

Monster

HDMI400/DVI-4M : 123154

4m Monster 400 HDMI

149.95 ea

Wire

Pre-C

Interconnect

Monster

HDMI400/DVI-6M : 123155

6m Monster 400 HDMI

169.95 ea

Wire

Pre-C

Interconnect

Monster

I250-.5M

.5m Interlink 250 Audio

19.95 pr

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.

Product Library Utility - Reset & Update

451 of 451

?

Done

Clean Delete

Reset Update

Find Change

General Import

User Import

RCMS Import

Distributor Import

Export Products

Reset - Net Cost based on Exchange Rate

Update - AlphaFinder Make List

If an exchange rate is entered into the Master Prefs/Other/Products 2 screen, and there are costs in the Optional Cost field on the Product Detail screen,

Reset Net Cost with Exchange Rate

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

Update Makes & Groups

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

Find Products

Fav A

B

C

Show Hidden

Product Library - Line List

AlphaFinder Show Makes

Home

All

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Show Products

Hidden Products

Part

Phantom

Bulk

PreCut

All Suppliments

Discontinued Products

Utilities

Utility Lists

EME

audio & video

451 Items

451 Total

New Product

Detail List

Inventory Control

Leave

Product Sets

Print Menu

Show All Groups

Displin

Cat

Type

Class View

Make

Model : SKU

Description

Finish

Sell Price

Cue

Auto Tag

<Installed

Notes

Fav

Hide

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			

Product Library Utility - Clean & Delete

451 of 451

Done

Clean Delete

Reset Update

Find Change

General Import

User Import

RCMS Import

Distributor Import

Export Products

Clean - Product Make, Model, Desc & Group Fields

This will set remove any blank spaces, carriage returns and quotes from the product Make, Model, SKU, Description, Features and Group fields.

Clean Fields

Clean - Duplicate Products

This utility will automatically find all products with the same Make & Model and add a unique (ID) to the model number to make that product unique.

Clean Duplicates

Delete - All Products in Library

This will permanently delete all of the products in this Product Library.

Delete All Products

Delete - Products without Model numbers

This will permanently delete all of the products in the Product Library without Model numbers.

Delete Blank Products

Product Library Utility - Export Products

Buttons 1-6 to Select & Export desired Products

1 Export Only Products in Entities | 2 Show Make List | 3 Omit Undesired Makes | 4 Show Product List | 5 Omit Undesired Products | 6 Export 30 Products

30 Items
451 Total

3 Omit Makes | 5 Omit Products

Displin	Cat	Type	Class	Make	Model	SKU	Description	Finish	Sell Price	Hidden
Audio	Multi	Switcher	<input type="checkbox"/>	Creston	<input type="checkbox"/>	AADS	Adagio Audio	Black	2,500.00 ea	
Audio	Multi	Switcher	<input type="checkbox"/>				Audio	Black	2,900.00 ea	
Autom	Contr	Keypad	<input type="checkbox"/>				Keypad 8	Specify	260.00 ea	
Autom	Contr	Keypad	<input type="checkbox"/>				Keypad 12	Specify	360.00 ea	
Audio	Speak	Center Channel	<input type="checkbox"/>				annel	Black	399.00 ea	
Audio	Speak	Floor	<input type="checkbox"/>				e Tower	Black	499.00 ea	
Audio	Speak	Bookshelf	<input type="checkbox"/>				e Surround	Matte	450.00 ea	
Audio	Speak	Powered	<input type="checkbox"/>				e Subwoofer	Black	1,000.00 ea	
Audio	Multi	Keypad	<input type="checkbox"/>	Linn		5101 Personal Handset	Universal learning	Black	390.00 ea	

Message

Do you want to Export All Product Fields or only Make-Model-Description-Cost-Sell-Labor?

Make-Model | All Fields

Opened file in Excel

PD_MAKE	PD_MODEL	PD_SKU	PD_DESCRIP
Creston	AADS		Adagio Audio Distribution System
Creston	AADS-XM		Adagio Audio Distribution System w/ XM Sat Radio
Creston	C2N-DB8_		Decorator Keypad 8 Button
Creston	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.

Contacts - Entities								Home	
Mike & Jessica Potter						New Proposal	New POS	Done	
									New Task
Details	Info	Com Log	Entities	Files & Pix	Transactions	Entity Defaults			
Proposals - Projects - Change Orders - Completed Projects - Archived Proposals									
View	Entity Kind	Number	User	Title	Created	Sold	Completed	Total	Delete
	Master Project	1272.1-1.100		Home Theater System				\$28,640.07	
	Pending CO	1272.1c1-1.100		Home Entertainment System					
	Original Project	1272.2-1.100		Home Theater System				\$30,646.68	
	Proposal	1282.1-1.100		Security System	9/12/2006			\$60,553.35	
	Completed	1285.1-1.100		Home Theater System			1/30/2015	\$30,646.68	
	Pending CO	1285.1c1-1.100		Home Entertainment System					
	Completed	1287.1-1.100		Commercial Security System			9/12/2006	\$17,952.49	

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

Setup		Email Vendor		Delete PO		Project - Purchase Order Detail				1/9/2015 Post PO <input checked="" type="checkbox"/>		Prev/Next		?			
<input type="checkbox"/> Do not show Client/Project info on PO						Vendor Address <input checked="" type="checkbox"/>				Ship To Address <input checked="" type="checkbox"/>				Hide Prices <input type="checkbox"/>			
PO Number 1102 - 1303.1-1.100 User PO # xxxxxxx PO Date 1/9/2015						Show <input type="checkbox"/> PO Number <input type="checkbox"/> User PO# <input type="checkbox"/> Client Name				Crestron Electronics, Inc 15 Volvo Drive Rockleigh, NJ 07647				EME Audio & Video Systems 100 Purchasing Lane Purchasing City, WI 567937			
Buyer: Joe Buyer Buyer Override: Shipping Method: Best Way PO Terms:						1303.1-1.100 Jim Engandela				PO Total \$1,250.00				Receiving Auto Receive All PO Items			
PO Comments & Notes:						Date Received:				Received By:				Done			
Order Qty Buy Qty						Make Description				Model				Finish			
1 ea 1 ea						Crestron Adagio Audio Distribution System				AADS				Black			
Global Buy Pkg Off						Cost Override Unit Raw Cost				Ext Raw Cost				1,250.00 1,250.00			
note:						Receive				Qty Recvd				Qty Open			
1 ea						1 ea				1 ea				1 ea			

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.

Printer SetupPDF reDirectCopy

Proposal - Print Menu - Project Costing

Refresh?Home

PDF reDirect Pro v2,winspool,Ne01:Jim EngandelaDone

ProposalsProjectsCostingPurchasing

Home Entertainment System1312.1-1.100

Job Costing

Project Pricing

Master Project Pricing

Payment Terms

Payments & Balances Summary

Areas & Products Costing

Areas & Products Summary with prices

Areas & Products Summary no prices

Areas & Products Summary no prices, with Text

Project Fees

Project Fees Listing with Fees directed to Labor & Parts

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.

Contacts - Entities

?

Home

Jim Engandela

New Proposal

New POS

New Task

Entity Defaults

Done

Prev Next

1 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	1303.1-1.100		Home Entertainment System				\$2,684.98	
	Pending CO	1303.1c1-1.100		Home Entertainment System					
	Pending CO	1303.1c2-1.100		Home Entertainment System					
	Proposal	1305.1-1.100		Home Entertainment System	8/5/2014			\$10,397.24	
	Proposal	1306.1-1.100		Home Entertainment System	9/10/2014			\$0.00	
	Proposal	1307.1-1.100		Home Entertainment System	9/10/2014			\$0.00	
	Proposal	1308.1-1.100		Home Entertainment System	9/10/2014			\$0.00	
	Proposal	1309.1-1.100		Home Entertainment System	9/10/2014			\$2,811.33	
	Proposal	1310.1-1.100		Home Entertainment System	9/10/2014			\$6,085.12	
	Proposal	1311.1-1.100		Home Entertainment System	10/22/2014			\$7,352.43	
	Proposal	1312.1-1.100		Home Entertainment System	10/22/2014			\$8,101.16	

[Billing Contact] Proposals - Projects - Change Orders - Completed Projects - Archived Proposals

View	Entity Kind	Number	User	Title	Created	Total	Delete

X = Archived

POS

Remaining Balance

Tracker Task/Appointment

View	Entity Kind	Number	Created	Total	Delete	View	Due Date	Tracker Kind	Owner	Delete
	Quotation	QT #7225	2/4/2015	\$16,035.00			12/15/10	Appointment	Jim Engandela	
	Quotation	QT #7224	9/5/2014				10/7/10	Appointment	Jim Engandela	
	Service Ticket	SO #7209	7/5/2014				10/13/05	Client Task	Jim Engandela	

Print Setup Delete Duplicate Add New POS - Quotation Sold ☐ Home

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

QUOTATION
QT #7225 1 of 1

Convert Quote to a Sales Invoice

Contact Done
Set Up Prev Next

Label Address 2: ☐ Show ☐ Hide

Grand Total: **\$16,035.00**

2/4/15

Jim Engandela Home 715-287-3335
Mobile 715-287-3335

Jim Engandela

Sales Rep Ship VIA Payment Terms Reference # Quotation Title

Jim Engandela Quotation prices good for 30 days

Pick Qty unit ☐ Pick Price Cue Product Description (max 2 lines) Install (h:m:s) Unit Price Ext Price Tax A B

6	ea	Crestron : AADS : Adagio Audio Distribution System : Black	0:45:00	2,500.00	15,000.00	T	T
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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.

Super Views Auto Build Delete Areas Proposal - Areas & Products Client Mode ☐ Grand Total ? Home

Karen & Andy Nelson

Products \$29,782.94
Labor \$995.83
Parts \$200.00
Wire \$3,041.20
Area Total \$34,019.97 Labor Time 15:20:00

Telephone System 1271.1-1.100

Areas Text Products

Labor Parts Wire Tasks

Location Zone Areas

Pick or Type Area

Max 40 Characters

Location	Zone	View	Sort	Nam	Dup	Set	Del
	1	Home Theater	m				
	2	Living Room	m				
	3	Bathroom 3	m				
	3	Office	m				

Zone 1 - Home Theater

Products Sets Supplements

Discipline	Category : Type	Sort	View	Qty	Make : Model	Unit Sell	Extended Sell	Del
Audio	Amplifier : Multi-channel	m		1	Linn : 5125	\$3,575.00		
	ea Five channel power amplifier					\$3,575.00		
Audio	Speaker : Bookshelf	m		5	Linn : Katan	\$1,293.50		
	pr Bookshelf loudspeakers: pair					\$6,467.50		
Audio	Speaker : Powered Subwoofe	m		1	Linn : Melodik	\$6,435.00		
	ea Aktive isobarik bass extension					\$6,435.00		
Video	Display : DLP Video Projec	m		1	Runco : CL-610	\$10,393.50		
	ea DLP Projector					\$10,393.50		
Video	Source : DVD Player	m		1	Sony : DVP-NS999ES	\$1,429.94		
	ea Progressive Scan DVD Player					\$1,429.94		
Automation	Remote : Handheld Remote	m		1	Linn : 5101 Personal Handset	\$507.00		
	ea Universal learning remote					\$507.00		
Automation	Control : Keypad	m		1	Linn : Knekt RCU	\$975.00		
	ea Knekt room control unit					\$975.00		