



2018 SmartPartner

New Features, Enhancements and Fixes

SCPS 13.5v1 Upgrade

New Features, Enhancements and Fixes

9-17-2018

SCPS Screen Magnification Override

You can now click on the Screen Magnification button and change the screen size.

This change overrides the User Default Screen Magnification.

Logging into SCPS restores the User Default Screen Magnification setting.

SmartPartner SOFTWARE

High Definition Proposal & Project Management System

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

Thursday
September 13, 2018

Message

Screen Magnification - Override

Log in to Restore - User Screen Magnification Default

200%

150%

100%

Usage

Horizon Software accepts no liability, actual or implied, as a result of using this software or documentation

Home button: Automatically Unlock Entities when using the Home button

Discipline	Area	Phase	Fav	Project - Detail by Area	QV	Utilities		Home
Client	Areas	Overviews		Jim Youngblood Youngblood Builders, Inc. 26 Chilton St Project 2834.1-1.104		Pricing	Invoicing	Leave
Project	Info	Products				Payments	Purchasing	Tracker
Contact	Log	Supplements				Project Fees	Work Orders	Print Menu
Client Mode <input type="checkbox"/>	Labor Details	Super Views	Entities		Convert	Wire Manager	Change Orders	Grand Total
Discipline : Category : Type				CO	Qty	Make : Model	Description - Finish	Area Totals
26 Chilton St Project								
000 Network Head End								\$6,688.27
Racks/Mounts : Rack : Equipment Rack		1 ea		Middle Atlantic : EWR-12-22		12U EWR Series Pre-Configured		505.00

Proposals and Pending CO's: Add Client Mode Password

If you enter a Password in Master Prefs/Other/Proposals 2, users will be required to enter that password to enter or remove the Client Mode in a Proposal.

Discipline

Area

Phase

Fav

Proposal - Detail by Area

QV

Utilities

Home

Client

Areas

Overviews

Ryan Abraham

Pricing

Invoicing

Leave

Project

Info

Products

Area Text

Custom Integrated System

Payments

Purchasing

Tracker

Contact

Log

Complements

Install Notes

2835.1-1.100

Project Fees

Work Orders

Print Menu

Client Mode ☐

Labor Details

Super Views

Entities

Convert

Wire Manager

Change Orders

Grand Total

Discipline : Category : Type

Qty Make : Model

Description - Finish

Area Totals

Custom Integrated System

Atrium

\$6,999.24

Audio : Distribution : Matrix Switch1 ea Control4 : TS-AMS2424-Source, 24-Zone Audio Matrix2,400.00

Automation : Control : Controller1 ea Control4 : C4-EA5 : 6650Entertainment and Automation2,000.00

Client Mode Password

Please enter the Client Mode Password

cmode

Cancel

OK

Discipline

Area

Phase

Fav

Proposal - Detail by Area

QV

Utilities

Home

Client

Areas

Overviews

Ryan Abraham

Pricing

Invoicing

Leave

Project

Info

Products

Area Text

Custom Integrated System

Payments

Purchasing

Tracker

Contact

Log

Complements

Install Notes

2835.1-1.100

Project Fees

Work Orders

Print Menu

Client Mode ☒

Labor Details

Super Views

Entities

Convert

Wire Manager

Change Orders

Grand Total

Discipline : Category : Type

Qty Make : Model

Description - Finish

Area Totals

Custom Integrated System

Atrium

\$6,999.24

Audio : Distribution : Matrix Switch1 ea Control4 : TS-AMS2424-Source, 24-Zone Audio Matrix2,400.00

Automation : Control : Controller1 ea Control4 : C4-EA5 : 6650Entertainment and Automation2,000.00

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

Labor Meter

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

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

Labor Percentage of Equipment %

User Specific Proposal Payment Plans

User Specific Proposal Payment Plan

EZ Proposal Mode

Activate

Activate EZ Proposal Mode ☐ Adds EZ option to Add Proposal Button

Auto Enter Proposal Title ☒

Auto Add 1st Area Name ☒

No Prompt - Pick Products or Sets ☒

Client Mode - Hide Cost Prices

The Client Mode feature hides all Costs and GP% in a Proposal, Project or Change Order. There is a Client Mode checkbox in the Client screen, the Utility screen, the Pricing screen and Product List and Product Detail screens to enable or disable this feature.

New Proposal default ☐ When creating a New Proposal the Client Mode will automatically be enabled. This can always be disabled once the Proposal is created.

Existing Entity Pop Up Cue ☐ When entering an existing Proposal/Project/Completed/Archive or Change Order...if the Client Mode is Not enabled, a Pop Up message will ask if you want the Client Mode.

If a Password is entered, a Password will be required to enter the Client Mode

Proposal/Project/Pricing: View Cost Screens, with User Access Rights

A new Cost button has been added to all Entity Pricing screens. Access to the Cost screen is set in Master Prefs/Users/Access Rights (see below)

There are a couple of reasons for hiding cost and profit.

On large proposals/projects it reduces the calculation time to refresh the Pricing screen screen by 25%, which is significant.

Also, some shops don't want users to see the cost and profit and rather that their users determine the profitability by the GP%, but of course you can give them access rights to see it if you wish.

Client Mode ☐

Proposal - Pricing

Printer Setup

Print

? Home

Mark Levin

Done

Pricing

Labor

Commissions

Tax Summary

Product Tax

Fees Tax

Update Solarium TV
2836.1-1.104

Proposal - Pricing

Refresh

Show Cost

Show List Price & Discount ☐ yes ☒ noShow Sales Tax ☒ yes ☐ no

Labor Meter

Excluded
Products Totals

Subtotals	Sell	GP%	Discount	Total Labor Time
Equipment	\$4,599.98	38.8%		29:53:59
Labor	\$3,288.97	45.5%		
Parts	\$39.99	70.0%		
Wire & Cable	\$0.00			
Professional	\$493.35	50.0%		
Total	\$8,422.28	42.2%		
Tax	\$258.75			
Grand Total	\$8,681.03			

Adjust
Total
Prices

Proposal Equipment - Price Adjuster

Restore
All Prices
to Original SellAdjust Prices
by individual
Products

\$4,599.98

Discountable
Equipment Sell TotalSet
All Prices
to Minimum SellSet Sell Price
Adjustment
based on \$ AmountAdjustment Type: Set All Prices
to AdjustmentPercentage %: ±\$ ±

Price Adjustments will be applied to all selected Equipment in this Proposal,
except those products that are checked "Do Not Discount" or "No Disc't

Global Adjustments will override all Individual Equipment Price Adjustments

To Adjust Prices by Group, Make, Model, Area or Phase, Click "Adjust Prices by Products" button

If a product has a List price, the discount will be the difference between the List price and the Sell price.

If a product does not have a List price, the discount will be the difference between the Original Sell Price and Adjusted Sell price.

Labor Summary

Labor Category	(h:m) Hours	(hourly) Rate	Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	Total
1 - Installation	29:53	\$110.00	\$3,288.97			\$3,288.97
2 - Configuration		\$125.00				
3 - Programming		\$150.00				
4 - Parts Labor		\$110.00				
5 - Wire Labor - Bulk		\$180.00				
6 - Wire Labor - Precut		\$110.00				
Total Amount			\$3,288.97			\$3,288.97
(h:m) Total Hours	29:53			0:00	0:00	29:53

Project - Pricing - Cost					0	Printer Setup	Print	?	Home
Jim Youngblood Youngblood Builders, Inc. 26 Chilton St Project 2834.1-1.104					Done				
Grand Total of Project with all Change Orders					Refresh				
	Project	Cost	Profit	GP%					
Equipment	\$7,501.67	\$4,541.00	\$2,960.67	39.5%					
Labor	\$3,929.58	\$2,312.50	\$1,617.08	41.2%					
Parts	\$592.00	\$379.08	\$212.92	36.0%					
Wire & Cable	\$306.85	\$222.85	\$84.00	27.4%					
Professional Services	\$1,294.23	\$611.90	\$682.33	52.7%					
Total	\$13,624.33	\$8,067.33	\$5,557.00	40.8%					
Tax	\$518.78								
Grand Total	\$14,143.11								

Set User Access Rights to View Costs

Proposal Area Portal No "Add Product" Prompt <input type="checkbox"/> ?	Proposal Product Portal Sort by Make Not Discipline <input type="checkbox"/>	Product Favorites User Assignable Not Global <input type="checkbox"/>	<input type="checkbox"/> Check All	User Access Rights Jim Engandela President Checked boxes have Access Rights Unchecked boxes do not have Rights	<input type="checkbox"/> UnCheck All	Sort Users	<input type="button" value="Prev/Next"/>	<input type="button" value="Home"/>	<input type="button" value="Done"/>
					PC Screen Size <input type="text" value="Computer"/> ?		Screen Magnification <input type="text" value="100%"/>		
Module/Screen Access <input checked="" type="checkbox"/> Preferences <input checked="" type="checkbox"/> Project Manager <input checked="" type="checkbox"/> Inventory Control Module <input checked="" type="checkbox"/> Module Utilities <input checked="" type="checkbox"/> Proposal - Project - CO Admin Utility <input checked="" type="checkbox"/> Proposal - Project Commissions <input checked="" type="checkbox"/> Proposal Custom Print Layouts <input checked="" type="checkbox"/> CPS Custom Proposal System access			Access Level <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		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				
Proposals & Change Orders <input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Archive			Proposals - Projects - Completed Archives - Change Orders <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/> Duplicate <input checked="" type="checkbox"/> View Cost		Edit Projects & Final CO's <input type="checkbox"/> Edit Project & Final CO <input type="checkbox"/> Convert Final CO to Pending				
			Convert Proposals - Projects <input checked="" type="checkbox"/> Conversions Proposal > Project > Completed		Point of Sale <input checked="" type="checkbox"/> Delete/Archive Invoices <input checked="" type="checkbox"/> Invoice Product Sell Price <input type="checkbox"/> Purchase Order Access				

Proposal/Print Menu: Product Summary Reports-Improve Like Kind Product Sum Quantities

SHADES

3 ea CES : LUTRON-SHADE-PREWIRE : Lutron Motorized Window Treatment Prewire
 3 Prewire between a Lutron QS shade, curtain, or drape, and a power panel.



19 ea CES : LUTRON-SHADE-PREWIRE : Lutron Motorized Window Treatment Prewire
 4 Prewire between a Lutron QS shade, curtain, or drape, and a power panel.



AUTOMATION

2 ea CES : CES-BLDR-DS-PREWIRE : Exterior Door Station Prewire
 1 Prewire for an exterior door station.



Proposal/Print Menu: Speed up entering the Print Menu screen

Discipline	Area	Phase	Fav	Proposal - Detail by Area		QV	Utilities		Home
Client	Areas	Overviews		Mark Levin Update Solarium TV 2836.1-1.104			Pricing	Invoicing	Leave
Project	Info	Products	Area Text				Payments	Purchasing	Tracker
Contact	Log	Supplements	Install Notes				Project Fees	Work Orders	Print Menu
Client Mode	Labor Details	Super Views	Entities		Convert	Wire Manager	Change Order	Grand Total	
Discipline : Category : Type				Qty	Make : Model		Description - Finish	Area Totals	
Update Solarium TV									
001 Solarium									\$7,928.94
Video : Display : Flat Panel TV				1 ea	CES : ISF-TV : 1749		ISF Video Calibration for Flat Panel		500.00
Video : Display : Flat Panel TV				1 ea	Sony : XBR-65Z9D		65" Class 4K HDR-DV		3,499.99
Racks/Mounts : Bracket : TV Bracket				1 ea	Sanus : CILF130		XL Full-Motion Mount For 40" - 95"		599.99

Proposal/Area Text: Compensate for Screen Magnification so picking Text keeps the Text size the same

Problem when using computer monitors with high resolution

Clear All Area Text

Proposal - Area Text
Client Mode
? Home

Areas

Text

Products

Labor

Parts

Wire

Tasks

JD Gill
Gill ID Systems
100 Printable DSX Access Cards
9515.1-1.110

Done

Pick

1 - Pick Area

2 - Pick Text Category

3 - Pick (ALL PROPOSALS SYSTEM DESIGN) Text

100 DSX Cards

3 Day Cancellation

3rd Party Lease

Access Control PM and

AHJ

ALL PROPOSALS SYSTEM

BA Inspection Contract

Category

Connell

DSX REQUIREMENTS

DSX System

EOLR NOTICE

FA INSPECTIONS

INTERCOM W/ LOCKS

Material/Services

SYSTEM DESIGN TEXT

Products in: 100 DSX Cards

Green fields = Editable W/O Product Install Notes

Gray fields = Permanent Product Install Notes

Proposal - Area Text for: 100 DSX Cards
?

Add to Library

DSX : XD-7510

Inspect and Test Access Control System:
Verify all Card Readers are operating Properly
Inspect all Electrified Locking Hardware
Lubricate and adjust Electrified Locking Hardware where necessary
Perform System Database Backup
Perform Software Updates
Inspect Reader Controllers and Batteries
Inspect Lock Power Supplies
Inspect all Rex Buttons and PIR's

Phase initial desired Preventative Maintenance Inspection frequency
Monthly Inspections\$300.00 per month
Quarterly Inspections\$100.00 per month
Semi Annual Inspections\$50.00 per month
Annual Inspections\$25.00 per month

Compensation so Text Size is correct regardless of your Screen Magnification

Project/Print Menu/Projects: New Product Reconciliation Report with Change Order Status

Printer Setup
PDF reDirect
Copy

Master Project - Print Menu - Project Shop

PDF reDirect Pro v2,winspool,Ne01:

Anthony Clemente
Done

Custom Integrated System
2813.3-1.103

Project Approval
Wire Manager

Proposals
Costing
Projects
Purchasing

Project Info

Client/Project Info
Project Site Directions
Project Tax Summary
Product Warranties
Product Cut Sheets
Product Specifications
Product Specifications (By Area)
Quality Control by Phase
Product Install Tasks
Master Product Delivery Form
Project Purchase Order Summary

Install Staging Reports

Select Phases

☒ 1 Prewire
☒ 2 Trim
☒ 3 Final

☐ Hide Staging Report Pricing

Staging by Make-Model (Total Qty)

Print All

Product Staging

Part Staging

Wire Staging

Staging by Zone-Area (Total Qty)

Print All

Product Staging

Part Staging

Wire Staging

Reconciliation Reports

All Project Products with Change Orders
Project Summaries with Change Orders

Sum Mode
Combines like kind items, with Sum Qty
Project Mode
Shows each Project & CO item with CO Number & Unit Qty

Select
Sum or Project Mode then Print

Sum
Proj

Project Products
Project Parts
Project Wire

Project Summary & Export

Super & Sum Views		Product Phases		Master Project - Products - View					Client Mode		<div><div></div><div></div><div></div><div></div><div></div></div>		<div><div></div><div></div><div></div></div>		<div><div></div><div></div><div></div></div>			
Areas		Text		Products		<div><div></div><div>Show All</div></div>		Anthony Clemente							Do			
Labor		Parts		Wire		Tasks		<div><div></div><div>Orphans</div></div>		Custom Integrated System					Orphan = <div><div></div></div>		Product Install Notes	
								2813.3-1.103					Phantom = <div><div></div></div>		Produ \$7			
Zone - Area				View		Make		Model										
<div><div></div><div>No</div><div>Exclude</div><div>Hide</div><div>Option</div></div>				Discipline		Category		Type		Product Labor		Unit List		Unit Sell				
<div><div></div><div>Discount</div><div>Price</div><div>Price</div><div>Product</div></div>				Phase		Finish		Description		Parts Labor		Unit Cost		GP%				
<div><div></div><div>Show</div><div>Show</div><div>Show</div><div>Show</div><div>Show</div></div>		Pix		CO#		Qty		Unit		Wire Labor		Updated		Ext				
								No Qty Sum						Ext				
Equipment Rack Location				2		Card Access		ZCA-ZXT30		472		159.00		159.00				
<div><div></div><div></div><div></div><div></div><div></div></div>		<div><div></div><div>Automation</div></div>		Control				Accessory				95.40		40.0%				
		1 Prewire						ZigBee Extender 3		0		11/15/2017						
				ea														

Cutting Edge Systems Corp - Confidential Report						
5/31/2018		Product Line List				Page 2
Anthony Clemente Custom Integrated System 2813.3-1.103						
CO	Qty	Make	Model	Adjusted Unit Sell	Ext Sell	
Phase	Discipline	Category	Type	Unit Sell	Ext Installed	
	Description			GP%	Cost	Ext Discount
	Zone - Area					
Ac1 1	1 ea Control4		C4-4Sight-E		\$100.00	\$100.00
	Automation	Control	Controller		\$100.00	\$143.13
	1 Year Sight Subscription Kit			40.0%	\$60.00	
C 1	1 ea Control4		TS-AMS8		\$1,200.00	\$1,200.00
	Audio	Distribution	Matrix Switch		\$1,200.00	\$1,977.29
	8-Source, 8-Zone Audio Matrix Switch			50.0%	\$600.00	
D c1 1	-1 ea Control4		TS-AMS8		\$1,200.00	-\$1,200.00
	Audio	Distribution	Matrix Switch		\$1,200.00	-\$1,977.29
	8-Source, 8-Zone Audio Matrix Switch			50.0%	\$600.00	
Ac1 1	1 ea Control4		TS-AMS8		\$1,200.00	\$1,200.00
	Audio	Distribution	Matrix Switch		\$1,200.00	\$1,850.79
	8-Source, 8-Zone Audio Matrix Switch			50.0%	\$600.00	
1	1 ea Control4		TS-PAMP8-100		\$1,700.00	\$1,700.00
	Audio	Distribution	Amplifier		\$1,700.00	\$1,932.96
	8-Zone/16-Channel Power Amplifier, 100 WPC			50.0%	\$850.00	
	Equipment Rack Location					

Project/Print Menu/Print Options: Access right Option to the Page Prefs from the Print Option screen

PDF reDirect Pro v2,winspool,Ne01:

Jonathan Hyett

Control4 Integrated System
2833.1-1.104

Push
Contract
Lines

Done Print Menu

Page Prefs

All Proposal Reports



Company Location

1

Cutting Edge Systems Corp

- ☐ Footers - Hide Client Initials Initials _____
- ☒ Footers - Use Salesman's Email instead of Show _____

Overviews - Page Breaks

- ☒ Page Break after each Overview

Areas & Products Report - Formatting

☐ Yes ☒ No Page Break after each Area

- ☐ Sort Areas = Zone/Location/Placement/Area
Normal Sort = Location/Zone/Placement/Area
- ☐ Hide Area Text and Show Products
- ☐ Show Area Text and Hide Products
- ☐ Hide Product Disciplines
- ☐ Show Product Install Notes

Contract

- Default ☒ Use Contract 1 Short
- ☐ Use Contract 2 Long
- ☐ Use Contract 3
- ☐ Use Contract 4

Message

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

OK

SubTotal Labels

Products	Equipment
Labor	Labor
Parts	Parts
Wire	Wire & Cable
Fees	Professional Services

1 SubTotal Label

- ☒ Equipment
- ☒ Labor
- ☒ Parts
- ☒ Wire & Cable
- ☒ Professional Services

Proposal Area Portal No "Add Product" Prompt <input type="checkbox"/> ?	Proposal Product Portal Sort by Make Not Discipline <input type="checkbox"/>	Product Favorites User Assignable Not Global <input type="checkbox"/>	Check All	User Access Rights <div> Jim Engandela President Checked boxes have Access Rights Unchecked boxes do not have Rights </div>	UnCheck All	Sort Users	Prev/Next	? Home
				PC Screen Size Computer ?	Done			
				Screen Magnification 100%	Commissions			

Module/Screen Access

- ☒ Preferences
- ☒ Project Manager
- ☒ Inventory Control Module
- ☒ Module Utilities
- ☒ Proposal - Project - CO Admin Utility
- ☒ Proposal - Project Commissions
- ☒ Proposal Custom Print Layouts
- ☒ CPS Custom Proposal System access

Proposals & Change Orders

- ☒ Add ☒ Archive
- ☒ Add Supplements (Labor, Parts, Wire)
- ☒ Delete Supplements
- ☒ Add New Tax Codes
- Edit**
- ☒ List Price
- ☒ Sell Price
- ☒ Minimum Sell
- ☒ Cost Price
- ☒ Pricing - Global Price Adjuster
- ☒ Pricing - Global Min Sell Adjuster
- ☒ Pricing - Hourly Labor Rates
- ☒ Product Detail Fields
- ☒ Labor Detail Fields
- ☒ Fees - Project screen
- ☒ Fees - Services screen
- ☒ Fees - Expenses screen
- Total Price Adjustor**
- ☒ Total Price Adjustor

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

- ☒ Delete ☒ Duplicate ☒ View Cost

Convert Proposals - Projects

- ☒ Conversions
Proposal > Project > Completed

Archived Proposals

- ☒ Restore

Text Library

- ☒ Add ☒ Delete ☒ Duplicate
- Edit**
- ☒ Text Fields

Info Library

- ☒ Add ☒ Delete
- Edit**
- ☒ Info Fields

Letter Library

- ☒ Add ☒ Delete
- Edit**
- ☒ Letter Fields

Product Sets Library

- ☒ Add ☒ Delete ☒ Duplicate
- Edit**
- ☒ Set Fields

Contacts

- ☒ Delete

Projects

- ☒ Add Change Orders
- ☒ Add Purchase Orders
- ☒ Add Work Orders
- ☒ Add Sales Invoices
- ☒ Override Print Menu Prefs & Print Options Project Lockout

Edit Projects & Final CO's

- ☒ Edit Project & Final CO
Convert Final CO to Pending

Point of Sale

- ☒ Delete/Archive Invoices
- ☒ Invoice Product Sell Price
- ☒ Purchase Order Access

Product Library

AlphaFinder

- ☒ Show Makes
- ☒ Show Product Groups
- ☐ Show Hidden Products

Products
 Including Labor, Parts, Wire Supplements

- ☒ Add ☒ Delete
- ☒ Duplicate ☒ Hide

Edit

- ☒ List Price
- ☒ Sell Price ☒ Minimum Sell
- ☒ Cost
- ☒ Price Adjusters ☒ Do Not Discount
- ☒ Groups, Class & Phase
- ☒ Product Detail Fields
Make, Model, SKU, Finish
Description, Features, Cue Notes
- ☒ Specifications Fields

Master Tracker

- ☒ Delete

Product Labor Rates & Time

- ☒ Proposal & Product Library - Product Override Labor Time
Note: Users always have rights to add/change Pure Labor Supplements in Proposals & CO's
- ☒ Proposal - Pricing Screen - Labor Rates
- ☒ Product Library - Labor Sub Groups

"Do Not Allow if Checked" Access Rights

- ☒ Do not allow Access to the Proposal Preferences screen
- ☐ Do not allow Access to the Proposal Print Option screen
- ☐ Do not allow Access to SCPS Allow only CPS access
- ☐ Do not allow Adding Products or Supplements to Proposals
- ☐ Do not allow Sell Price Less than Minimum Sell
- ☐ No "Pick Product Prompt" when Adding Areas

Projects: Pending Change Orders: Add Duplicate Area feature

Master Project

Kevin Starr

Adult Lounge and MBR Changes

2788.1-1.103

CO Status

C = Changed

A = Added

D = Deleted

Done

Master Project

LaborPartsWire

Pick Area

LocationZoneAreas

Add Products & Supplements to Area

Change Qty

Status

Qty

Make : Model

Finish

Unit Sell

Ext Sell

000			Basement and 1st Floor Head End	+						
001	1		Game Room	+						
002	2		Cigar Room	+						
003			Air Handler Vault	+						
005	3		Bar	+						
010	4		Movie Room	+						
013			Basement Suite	+						
019			HVAC Room	+						
101			Main Entry	+						
102	5		Living Room	+						
103	6		Adult Lounge	+						
104			Glass Deck Area	+						
105	7		1st Floor Play Room	+						
105a			Playroom Storage	+						
109	8		Kitchen	+						

Super View

Area Sum

Prod Sum

Pending Change Order

Labor Total

Grand Total

Kevin Starr

Adult Lounge and MBR Changes

2788.1c1.3-103

Equipment

Labor

Parts

Wire & Cable

103 Zone 6 - Adult Lounge Total:

\$3,770.00

\$1,666.67

\$106.40

\$255.00

\$5,798.07

AreasTextProducts

LaborPartsWireTasks

LocZone

Max 40 Characters

Pick or Type Area

Area

No Prompt

Sort Make

Discipline

Cat>Type

Status

Sort View

Qty

Make : Model

Finish

Unit Sell

Ext Sell

Tag

000		m	Basement and 1st Floor Head																
103	6	m	Adult Lounge																
202	14	m	Master Bedroom																
202	14	m	Master Bedroom - 2																

103 Zone 6 - Adult Lounge

Products

Sets

Supplements

Audio	A	m	4	Sonance : 91688	\$180.00	
Speaker : Bracket	ea	Medium Round Acoustic			\$720.00	
CO Notes		Shop Notes				
Audio	A	m	1	Sonance : VP10SUB NC	\$1,600.00	
Speaker : Subwoofer	ea	In-Wall 10" Subwoofer for New			\$1,600.00	
CO Notes		Shop Notes				
Audio	A	m	2	Sonance : VP66R	\$725.00	
Speaker : In-Ceiling	pr	Visual Performance 6-1/2"			\$1,450.00	
CO Notes		Shop Notes				

POS/PO: PO's without items now show as Open instead of Closed

Print Setup Delete Duplicate Add New **POS - Purchase Order** Converted Ref: 1 of 1 ? Home

Print Store Copy Preview Hide All Costs

OPEN PO #7206

Vendor: Ann and Will Andrews
22 Falcon Ridge Dr
Hopkinton, MA 01748
eMail: annlyn.andrews@verizon.net

User PO #: Mobile 508-544-9695

Ship To: Shop Warehouse: Cutting Edge Systems Corp
364 Littleton Rd
Westford, MA 01886
Ph: 978-392-1392 Ext:
Fax: 978-392-1399
email: qgosselin@cuttingedgehome.com

5/23/2018
Open
Need By

Buyer: Gary Gosselin Reference Reference 2 Ship VIA FOB Terms Standard Terms Receive All

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

POS/PO: Ship To Address Options: Alternate 1 and 2 and PO Specific

You can now change the POS PO Ship to Address from the Shop Warehouse default to an Alternate 1 or 2 address.

This is stored in the Master Prefs/PO/Defaults screen or to a PO Specific Address on the Setup screen within each PO itself.

Print Setup Delete Duplicate Add New **POS - Purchase Order** Converted Ref: 1 of 1 ? Home

Print Store Copy Preview Hide All Costs

OPEN PO #7204

Vendor: Ryan Abraham
10 Fox Run
West Townsend, MA 01474
eMail: ryan.p.abraham@gmail.com

User PO #:

Ship To: Shop Warehouse: Cutting Edge Systems Corp
364 Littleton Rd
Westford, MA 01886
Ph: 978-392-1392 Ext:
Fax: 978-392-1399
email: qgosselin@cuttingedgehome.com

5/23/2018
Open
Need By

Buyer: Gary Gosselin Reference Reference 2 Ship VIA FOB Terms Standard Terms Receive All

Pick	Qty	unit	Product Description (max 2 lines)	Unit Cost	Ext Cost	Qty Rcvd	Qty Open	Qty Dlvrd
	1	ea	Access Networks : ANE-ENC1-01WT : Access Point Enclosure : White	44.00	44.00	1	0	

Master Prefs - POS Defaults

? Home

Defaults

Comments

Terms

Alternate

PS Ticket

Done

POS Options

Do Not Sort POS Lists screens ☐

Sort POS List screens by

- ☐ Show Product Cue Notes when Picking Products into a POS Invoice
- ☐ Show Print Dialog when Printing all POS Invoices
- ☐ Show "Completed Signature" Line on Quotations, Work Orders, Service Orders
- ☐ Hide Labor Matrix Detail when Printing all POS Invoices
- ☐ Hide Quotation & Invoice GP% and Cost Total
- ☐ Suppress "Copy File Name" Notice when Printing
- ☐ Do Not Copy File Name into Memory when Printing

POS Hourly Labor Rate

Sell

Cost

\$90

\$40

Show SKU in Product Listing

No

POS Invoice Tax Labels

Show AB Tax

A Tax Label

B Tax Label

Don't Show

Purchase Orders

Purchase Order "Reference" field Label

Purchase Order "Reference 2" field Label

PO Ship to Alternate 1 Address

PO Ship to Alternate 1 Address

PO Ship to Alternate 2 Address

PO Ship to Alternate 2 Address

PO Specific Address on the Setup screen within each PO itself.

Print Setup
 Delete
 Duplicate
 Add New
 POS - Purchase Order
 Converted Ref: ▼ ▲ ▼ ▲ ? Home

Print
 Store Copy
 Preview
 Hide All Costs
 OPEN PO #7204
 1 of 1
 Contact Done
Set Up Prev Next

Vendor: Ryan Abraham
 10 Fox Run
 West Townsend, MA 01474
 eMail: ryan.p.abraham@gmail.com

User PO #:
 Ship To: Shop Warehouse:

Cutting Edge Systems Corp
 364 Littleton Rd
 Westford, MA 01886
 Ph: 978-392-1392 Ext:
 Fax: 978-392-1399
 email: qgosselin@cuttingedgehome.com

5/23/2018
 Open
 Need By

Buyer: Gary Gosselin
 Reference:
 Reference 2:
 Ship VIA:
 FOB:
 Terms: Standard Terms
 Receive All

Pick	Qty	unit	Product Description (max 2 lines)	Unit Cost	Ext Cost	Qty Rcvd	Qty Open	Qty Dlvrd
	1	ea	Access Networks : ANE-ENC1-01WT : Access Point Enclosure : White	44.00	44.00	1	0	

POS - Purchase Order Set-Up
?

Update Contact Info
 Purchase Order PO #7204
Done

Primary Contact: Modify or Switch Contact

Contact: Ryan Abraham
 Company:
 Address: 10 Fox Run
 City: West Townsend
 St, Zip, Country: MA 01474
 Home Phone:
 Work Phone:
 Fax 1:
 Email: ryan.p.abraham@gmail.com

Other Preferences
 Change Date: 5/23/2018
Clearing this field will revert back to original creation date

Permanent Contact Client Notes

Ship To Label: Shop Warehouse:

Ship To Label:
 Cutting Edge Systems Corp
 364 Littleton Rd
 Westford, MA 01886
 Ph: 978-392-1392 Ext:
 Fax: 978-392-1399
 email: qgosselin@cuttingedgehome.com

PO Specific Address Label:
 PO Specific Address

Master Prefs: PO Alt 1 Ship To Address
 PO Ship to Alternate 1 Address

Master Prefs: PO Alt 2 Ship To Address
 PO Ship to Alternate 2 Address

Fix: Proposal/Print Menu/Project/Staging Report: Fix Wire Prices on these reports

Printer Setup			PDF reDirect			Copy			Proposal - Print Menu - Project Shop														
PDF reDirect Pro v2,winspool,Ne01:									Ryan Abraham									Done					
Proposals				Costing				Projects				Purchasing				Custom Integrated System 2835.1-1.100				Project Approval		Wire Manager	

Project Info		Install Staging Reports		Reconciliation Reports	
Client/Project Info		<div>Select Phases <input checked="" type="checkbox"/> 1 Prewire <input checked="" type="checkbox"/> 2 Trim <input checked="" type="checkbox"/> 3 Final</div>		All Project Products with Change Orders	
Project Site Directions		<input type="checkbox"/> Hide Staging Report Pricing		Project Summaries with Change Orders	
Project Tax Summary		Staging by Make-Model (Total Qty)		Sum Mode	
Product Warranties		Print All		Combines like kind items, with Sum Qty	
Product Cut Sheets		Product Staging		Project Mode	
Product Specifications		Part Staging		Shows each Project & CO item with CO Number & Unit Qty	
Product Specifications (By Area)		Wire Staging		Select	
Quality Control by Phase		Staging by Zone-Area (Total Qty)		Sum or Project Mode then Print	
Product Install Tasks		Print All		<input type="button" value="Sum"/> <input type="button" value="Proj"/>	
Master Product Delivery Form		Product Staging		Project Products	
Project Purchase Order Summary		Part Staging		Project Parts	
		Wire Staging		Project Wire	
Project Progress		Staging by Discipline (Total Qty)		Project Summary & Export	
<i>Net Qty with Change Orders</i>		Print All		Product Sum List	
BOM - Installation Items		Product Staging		Parts Sum List	
Installed vs Remaining to Install Products Only		Part Staging		Wire Sum List	
BOM - Installation Items		Wire Staging		All Sum List	
Installed vs Remaining to Install Products Only - with Area Text		<i>Items must have Phase Number/Names</i>		Qty Sum of Project Items and CO's	
BOM - Installation Items		Export Product Staging Items			
BOM - Installation Items		Staple Up Cards & Labels		Product Summary Reports	

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Cutting Edge Systems Corp - Confidential Report

Staging Document - Wire

Page 1

Total Qty
Sorted by Make-ModelRyan Abraham
Custom Integrated System
2835.1-1.100

Phase-Class	Qty	Make-Model-Finish SKU Description Unit Cost-Unit Sell	Order	Clk	InStock	OnOrder	Date	Initial
3 Final	28 ea	Binary : B5-AUD-1 :	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		B5-Series Analog Audio Cable 1 Meter (3.28	Rc'vd	<input type="checkbox"/>				
		\$12.99 \$33.95	Rc'vd	<input type="checkbox"/>				
			Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						
3 Final	2 ea	Binary : B5-DIGCOAX-1 :	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		B5-Series Digital Coax Cable 1 Meter (3.28	Rc'vd	<input type="checkbox"/>				
		\$8.28 \$43.95	Rc'vd	<input type="checkbox"/>				
			Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						
3 Final	1 ea	Binary : B8-4K-1 : Black	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		B8 Series Premium Certified HDMI Cable	Rc'vd	<input type="checkbox"/>				
		\$8.64 \$34.99	Rc'vd	<input type="checkbox"/>				
			Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						
3 Final	1 ea	Generic : PATCH-CAT6-3FT : Bue	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		0131	Rc'vd	<input type="checkbox"/>				
		CAT6 3ft Ethernet Patch Cable	Rc'vd	<input type="checkbox"/>				
		\$3.80 \$6.60	Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						
3 Final	1 ea	Generic : PATCH-CAT6-7FT : Bue	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		0472	Rc'vd	<input type="checkbox"/>				
		CAT6 7ft Ethernet Patch Cable	Rc'vd	<input type="checkbox"/>				
		\$5.85 \$9.85	Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						

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Cutting Edge Systems Corp - Confidential Report

Staging Document - Wire

Page 1

Total Qty
Sorted by Zone-AreaRyan Abraham
Custom Integrated System
2835.1-1.100

Phase-Class	Qty	Make-Model-Finish SKU Description Unit Cost-Unit Sell	Order	Clk	InStock	OnOrder	Date	Initial
3 Final	28 ea	Atrium	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		Binary : B5-AUD-1 :	Rc'vd	<input type="checkbox"/>				
		B5-Series Analog Audio Cable 1 Meter (3.28	Rc'vd	<input type="checkbox"/>				
		\$12.99 \$33.95	Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						
3 Final	2 ea	Atrium	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		Binary : B5-DIGCOAX-1 :	Rc'vd	<input type="checkbox"/>				
		B5-Series Digital Coax Cable 1 Meter (3.28	Rc'vd	<input type="checkbox"/>				
		\$8.28 \$43.95	Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						
3 Final	1 ea	Atrium	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		Binary : B6-4K-1 : Black	Rc'vd	<input type="checkbox"/>				
		B6 Series Premium Certified HDMI Cable	Rc'vd	<input type="checkbox"/>				
		\$8.64 \$34.99	Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						
3 Final	1 ea	Atrium	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		Generic : PATCH-CAT6-3FT : Bue	Rc'vd	<input type="checkbox"/>				
		0131	Rc'vd	<input type="checkbox"/>				
		CAT6 3ft Ethernet Patch Cable	Stock	<input type="checkbox"/>				
		\$3.80 \$6.60	Delivered	<input type="checkbox"/>				
		#						
3 Final	1 ea	Atrium	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		Generic : PATCH-CAT6-7FT : Bue	Rc'vd	<input type="checkbox"/>				
		0472	Rc'vd	<input type="checkbox"/>				
		CAT6 7ft Ethernet Patch Cable	Stock	<input type="checkbox"/>				
		\$5.85 \$9.85	Delivered	<input type="checkbox"/>				
		#						

8/28/2018

Cutting Edge Systems Corp - Confidential Report

Staging Document - Wire

Page 1

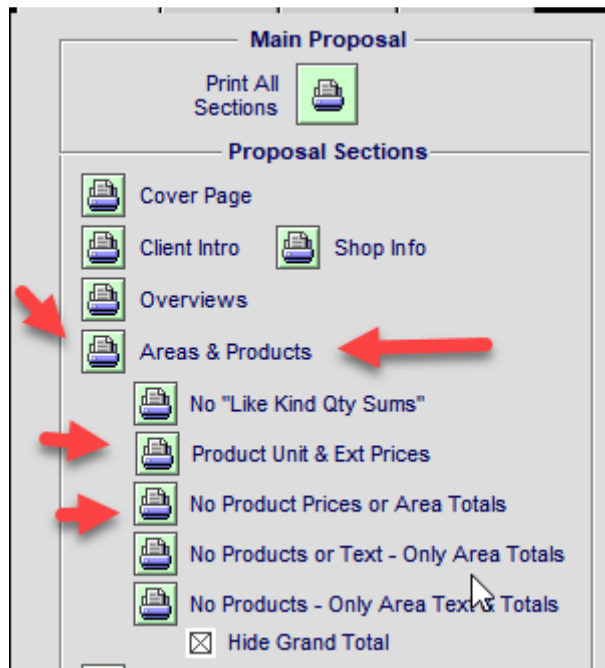
Total Qty
Sorted by DisciplineRyan Abraham
Custom Integrated System
2835.1-1.100

Phase-Class	Qty	Make-Model-Finish SKU Description Unit Cost-Unit Sell	Order	Ch	InStock	OnOrder	Date	Initial
3 Final	24 ea	Audio	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		Binary : B5-AUD-1 :	Rc'vd	<input type="checkbox"/>				
		B5-Series Analog Audio Cable 1 Meter (3.28	Rc'vd	<input type="checkbox"/>				
		\$12.99 \$33.95	Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						
3 Final	1 ea	Audio	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		Generic : PATCH-CAT6-3FT : Bue	Rc'vd	<input type="checkbox"/>				
		0131	Rc'vd	<input type="checkbox"/>				
		CAT6 3ft Ethernet Patch Cable	Stock	<input type="checkbox"/>				
		\$3.80 \$8.60	Delivered	<input type="checkbox"/>				
		#						
3 Final	2 ea	Automation	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		Binary : B5-AUD-1 :	Rc'vd	<input type="checkbox"/>				
		B5-Series Analog Audio Cable 1 Meter (3.28	Rc'vd	<input type="checkbox"/>				
		\$12.99 \$33.95	Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						
3 Final	2 ea	Automation	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		Binary : B5-DIGCOAX-1 :	Rc'vd	<input type="checkbox"/>				
		B5-Series Digital Coax Cable 1 Meter (3.28	Rc'vd	<input type="checkbox"/>				
		\$8.28 \$43.95	Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						
3 Final	1 ea	Automation	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		Binary : B6-4K-1 : Black	Rc'vd	<input type="checkbox"/>				
		B6 Series Premium Certified HDMI Cable	Rc'vd	<input type="checkbox"/>				
		\$8.64 \$34.99	Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						
3 Final	1 ea	Automation	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		Generic : PATCH-CAT6-7FT : Bue	Rc'vd	<input type="checkbox"/>				
		0472	Rc'vd	<input type="checkbox"/>				
		CAT6 7ft Ethernet Patch Cable	Stock	<input type="checkbox"/>				
		\$5.85 \$9.85	Delivered	<input type="checkbox"/>				
		#						

Fix: Project/Invoices: Sum Qty Fix

Show All				Phase 1				2	3	QB Estimate				Sales Invoice - All - 10 Products										PO		WO		SI		? Home									
Rick Vallarelli J & Co. 2827.2-1.103										Amount Remaining To Invoice				Left to Invoice				Labor Left 54:11:45 (hrs:mn)				Create Invoice				Leave													
Project Total				\$16,935.51				Products				18				Parts				3				Fees Left				4				Auto Set SI Qty				View Invoices			
Total Invoiced				\$146.50				Amt to Invoice				\$16,789.02				Wire				128																			
SI Products		SI Parts		SI Wire		SI Labor		SI Fees																															
Phase		Zone - Area		CO#		Proposal Sold		Make : Model		Sum		Proj		Orphan										Unit Sell		Qty to Invoice		Qty Invoiced to date		Qty Left to Invoice									
3						1 ea		CES : CES-CLIENT-AUDIO																								1							
								Installation of client-supplied audio component																															
1						1 ea		CES : CES-PERMIT : 1063																\$200.00								1							
								Wiring Permit Fee																															
3						1 ea		Crown : GCDI4x300BL-U-US																		\$1,290.00						1							
								Analog + BLU link input, 4 channel, 300W per																															
3						3 ea		DBX : ZC2																						1		2							
								Wall-Mounted Volume Controller																															
3						2 ea		DBX : ZC3																						1		1							
								Wall-Mounted Scene Controller																															
3						1 ea		DBX : Zonepro 640m																								1							
								6x4 Digital Zone Processor																															
2						1 ea		Middle Atlantic : EWR-12-22																								1							
								12U EWR Series Pre-Configured On-Wall Rack																															
3						1 ea		Panamax : M4320-PRO																								1							
								20amp BlueBolt Power Conditioner																															

Fix: Project/Print Menu: Areas & Products report - Qty Sums to account for Change Orders



rpt.area...

Pages:
?**CCTV**

This area includes the following products and features.

Closed Circuit Cameras are placed to optimise the area viewable. There will need to be some consideration as to how the camera is seen by the on-looker.

CCTV

	Qty	Ext. Price
Dahua : 8 Channel NVR CCTV Network Video Recorder 4Tb HD	1 ea	\$471.70
<i>Dahua's network video recorder offers a excellent performance and high recording quality for IP video surveillance applications. For applications where details are critical for identification, this professional NVR provides a powerful processor with up to 4K resolution. Additionally, the NVR features a mouse shortcut operation menu, remote management and control, centre storage, edge storage, and back up storage.</i>		
Dahua : 3MP IP BULLET CAMERA, 2.8-12MM MOTORISED LENS, 30M IR, DUAL STREAMING	4 ea	\$1,308.30
<i>3MP Full HD Network Water-proof IR Bullet Camera. This model is an IP66 motorised lens bullet camera with a resolution of up to 2048x1536 (3 megapixel). Dahua have included autofocus and DWDR</i>		
Equipment		\$1,343.90
Installation		\$657.36
Misc. Parts		\$275.00
CCTV		\$2,276.26

Fix: Project Change Order List: Posting Project & CO Totals to List Views

You will need to go in and out of a Proposal/Project/CO to update the price on the lists

Find Projects				Fav A				B	C	15 Projects										Projects										Sort								Print				?				Home																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																					
All				A				B				C				D				E				F				G				H				I				J				K				L				M				N				O				P				Q				R				S				T				U				V				W				X				Y				Z																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																											
Access Levels																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																			

Show All CO's		Project - All Change Orders					Print		? Home	
View Only Final CO's		Kevin Starr					Add a Change Order to this Project		This Project	
Final CO Totals		Custom Integrated System 2788.2-1.103							All Projects	
View		Type	Change Order Title		CO Reference Info		CO Total	Payments	Balance Due	Del
Dup	Fav	CO	Status	Date Created	CO Number					
	<input type="checkbox"/>		Pending	11/1/2017	2788.2c1-1.103	Adult Lounge and MBR Changes		-\$1,209.12		
		c1								p
	<input type="checkbox"/>		Pending	8/24/2018	2788.2c1.1-1.103	Adult Lounge and MBR Changes		-\$1,209.12		
		c1.1								p
	<input type="checkbox"/>		Pending	8/24/2018	2788.2c1.2-1.103	Adult Lounge and MBR Changes		-\$1,209.12		
		c1.2								p
	<input type="checkbox"/>		Pending	8/24/2018	2788.1c1.3-1.103	Adult Lounge and MBR Changes		-\$13,187.68		
		c1.3								p
	<input type="checkbox"/>		Pending	8/24/2018	2788.1c1.4-1.103	Adult Lounge and MBR Changes		-\$1,209.12		
		c1.4								p
	<input type="checkbox"/>		Final	2/22/2018	2788.2c2-1.103	Establish Baseline for Prewire		-\$203,188.11	\$0.00	-\$203,188.11
		c2								f

Fix: Project CO's: Duplicating CO's and improve speed














































Duplicating Change Orders now is fast, stays in the CO records and returns to the CO screen as it should.

This keeps the CO found set intact, but doesn't return to the CO screen. and need to be fixed so that it brings you back to the CO screen.

<div> <div>Show All CO's</div> <div>View Only Final CO's</div> <div>Final CO Totals</div> </div>	<div>Project - All Change Orders</div> <div>Kevin Starr</div> <div>Custom Integrated System 2788.2-1.103</div>					<div> <div>Print</div> <div>?</div> <div>Home</div> </div>
	<div> <div>Show COs for Projects</div> <div>Add a Change Order to this Project</div> </div>					<div> <div>This Project</div> <div>All Projects</div> </div>
<div> <div>View Type</div> <div>Dup Fav CO</div> <div>Status</div> <div>Date Created</div> <div>CO Number</div> <div>Change Order Title</div> <div>CO Reference Info</div> <div>CO Total</div> <div>Payments</div> <div>Balance Due</div> <div>Del</div> </div>						
<div> <div> <div></div> <div></div> </div> <div>Pending</div> <div>11/1/2017</div> <div>2788.2c1-1.103</div> <div>Adult Lounge and MBR Changes</div> <div></div> <div>-\$1,209.12</div> <div></div> <div></div> <div></div> </div>						<div> <div></div> <div></div> </div>
<div> <div> <div></div> <div></div> </div> <div>Pending</div> <div>8/24/2018</div> <div>2788.2c1.1-1.103</div> <div>Adult Lounge and MBR Changes</div> <div></div> <div>-\$1,209.12</div> <div></div> <div></div> <div></div> </div>						<div> <div></div> <div></div> </div>
<div> <div> <div></div> <div></div> </div> <div>Pending</div> <div>8/24/2018</div> <div>2788.2c1.2-1.103</div> <div>Adult Lounge and MBR Changes</div> <div></div> <div>-\$1,209.12</div> <div></div> <div></div> <div></div> </div>						<div> <div></div> <div></div> </div>
<div> <div> <div></div> <div></div> </div> <div>Pending</div> <div>8/24/2018</div> <div>2788.1c1.3-1.103</div> <div>Adult Lounge and MBR Changes</div> <div></div> <div>-\$13,187.68</div> <div></div> <div></div> <div></div> </div>						<div> <div></div> <div></div> </div>

Fix: POS/Sales Invoices: Improve Finding POS Invoices checked as Paid

Find Quote		POS - Quotation List - Archive 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
Quotations		Click on Quotation to view 627 Quotations																							Done	
View	Invoice	Client	Company												Specialist	Date	Proposal	Amount Acpt			Restore					
	QT #26200	Richardson, Dennis													Mark	1/17/2018		7,424.40	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
	QT #20946	Rieschel, Wayne													Bobby	9/3/2015		5,966.82	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
	QT #21079	Rieschel, Wayne													Bobby	9/23/2015			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
	QT #26729	Robbins, Darrel													Bobby			1,438.84	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
	QT #19649	Robertson, Mike													Mike Elsberry	1/21/2015		5,729.70	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
	QT #21384	Robertson, Bob													Mark	11/13/2015		24,084.50	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					

 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	 Add POS		Click on Quotation to view 621 Quotations																	QT	SI	CO	SO	WO	PO	RA	PST	Done 
View	Date	Invoice	Client	Company	Title	Converted to SI	Specialist	Amount	Sold																				
	5/21/2018	QT #26874	McCluck, Marci	O'Reilly Farm			LB	6,161.70																					
	5/11/2018	QT #26871	Brown, Rod				MC	22,289.05																					
	5/17/2018	QT #26860	Ferguson, Mike				KC	8,266.62																					
	5/14/2018	QT #26831	Smith, Michael				ME	5,837.39																					
	5/12/2018	QT #26829	Ferguson, Mike				KC	6,993.51																					
	5/11/2018	QT #26828	Schnelle, Jerry & Tina				KC	9,313.74																					
	5/11/2018	QT #26826	Brown, Rod				MC	24,041.34																					
	5/11/2018	QT #26821	Garoutte, Ashley	H2R Market Research			LB	882.55																					

Improve the precision of Balance due by rounding the numbers



SmartPartner SOFTWARE

High Definition Proposal & Project Management System

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

Thursday
April 5, 2018

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



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Proposal/Print Menu - Product Summary with Unit & Extended Price Report Options

All options for Hiding Unit Prices, Disciplines and Grand Totals as well as Page Breaks by Discipline now work properly.

Like Kind products with different Finishes now show as separate items with their own sum quantity.

Proposals Costing Projects Purchasing

Main Proposal

Print All Sections

Proposal Sections

- Cover Page
- Client Intro Shop Info
- Overviews
- Areas & Products
 - No "Like Kind Qty Sums"
 - Product Unit & Ext Prices
 - No Product Prices or Area Totals
 - No Products or Text - Only Area Totals
 - No Products - Only Area Text & Totals
 - ☐ Hide Grand Total
- Product Summary
 - Show Grand Total
 - ☐ Hide Disciplines
 - Show Discipline Subtotals
 - Show Grand Total
 - ☐ Hide Grand Total
 - ☐ Page Break by Discipline
- Fees & Services
- Contract
 - ☐ Show 2nd Address
 - ☐ Show Both Addresses
- Extra Text

Proposal Reports

Print All Sections

Products By

- Discipline Area Phase

Sub Totals By

- Discipline Area Phase

Grand Total By

- Discipline Area Phase

Product Summary
Unit & Ext Price

- Product Summary - Unit & Ext
 - ☐ Hide Unit Price
 - ☐ Hide Disciplines
 - ☐ Page Break by Discipline
- Product Summary - Unit & Ext with Discipline Subtotals & GT
 - ☐ Hide Unit Price
 - ☐ Hide Grand Total
 - ☐ Page Break by Discipline

Preliminary Contract

- Preliminary Contract with Options for:
Area Text & Totals, Disclaimer
Pricing Policy Price Expiry Date
No Payments or Terms

Proposal Supplements



Print All Sections

Supplements

- Labor Summary
- Labor Detail List
- Parts Summary
- Parts Detail List
- Wire & Cable Summary
- Wire & Cable Detail List
- Fees - Directed to Parts
- Fees - Directed to Labor
- Master Proposal & Supplements**
 - Discipline
 - Area
 - Products & Only Labor
 - Products & Supplements without Prices
 - Area by Phase
 - Phase

Product Summary

Audio

4 ea	Control4 : 8-Zone Matrix Amplifier	\$2,495.00	\$9,980.00
	<p><i>Get high-quality sound in up to eight audio zones from distinct sources. Regardless of the size of your home or project, you'll enjoy a powerful, multi-room music solution that's fully integrated into your Control4 system. This amp features 120W of high-quality sound from 8 analog input sources in 8 speaker output zones, advanced parametric equalizer capability with the Control4 Equalizer app which drives professional quality sound, full matrix switching, and volume-limiting capabilities.</i></p> 		
3 ea	Control4 : 8-Zone Matrix Amplifier	\$2,495.00	\$7,485.00
	<p><i>Get high-quality sound in up to eight audio zones from distinct sources. Regardless of the size of your home or project, you'll enjoy a powerful, multi-room music solution that's fully integrated into your Control4 system. This amp features 120W of high-quality sound from 8 analog input sources in 8 speaker output zones, advanced parametric equalizer capability with the Control4 Equalizer app which drives professional quality sound, full matrix switching, and volume-limiting capabilities.</i></p> 		

Total 23,162.95

Total	\$25,245.54
Tax	\$1,124.99
Grand Total	\$26,370.53

Normal Exit - Displays the latest Grand Total on the Proposal/Project List.

Fast Exit - Does Not Display the latest Grand Total.

Discipline

Area

Phase

Fav

Proposal - Detail by Area

QV

Utilities

Home

Client

Areas

Overviews

Project

Info

Products

Area Text

Contact

Log

Supplements

Install Notes

Client Mode

Labor Details

Super Views

Entities

Jim Youngblood

Youngblood Builders, Inc.

26 Chilton St Project

2834.1-1.104

Pricing

Payments

Project Fees

Wire Manager

Invoicing

Purchasing

Work Orders

Change Orders

Leave

Tracker

Print Menu

Grand Total

Discipline : Category : Type

Qty Make : Model

Description - Finish

Area Totals

26 Chilton St Project

000 Network Head End

\$6,688.27

Racks/Mounts : Rack : Equipment Rack

1 ea Middle Atlantic : EWR-12-22

12U EWR Series Pre-Configured

505.00

Telecom : Telephone : Structured

Phone/Internet/Video Service

Wiring Permit Fee -

100.00

Telecom : Telephone : Structured

Patroller and Enterprise-class

5 Port Multi-Media Router with

683.33

Networking : Device : Controller

24 Port/16-PoE Gigabit Fully

On-Wall 3x3 AC Wireless Access

1,283.33

Networking : Device : Router

580.00

Rack Mount, 15Amp, 8-Outlets 1U

528.33

Networking : Device : Switch

15amp BlueBolt Power Conditioner

606.67

Networking : Device : Wireless Access

Power : Conditioning : UPS

Power : Conditioning : PDU

Message

Normal Exit - Displays the latest Grand Total on the Proposal/Project List.

Fast Exit - Does Not Display the latest Grand Total.

Cancel

Fast Exit

Normal Exit

Proposal/Project Detail, Pricing and Print Menu: Speed Improvement Navigating to these screens

Discipline		Area	Phase	Fav	Proposal - Detail by Area		QV	Utilities					Home
Client		Areas	Overviews	Jim Youngblood Youngblood Builders, Inc. 26 Chilton St Project 2834.1-1.104				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	Entities				Convert	Wire Manager	Change Orders	Grand Total		
Discipline : Category : Type					Qty	Make : Model			Description - Finish			Area Totals	
26 Chilton St Project													
000 Network Head End												\$6,688.27	
Racks/Mounts : Rack : Equipment Rack				1 ea	Middle Atlantic : EWR-12-22			12U EWR Series Pre-Configured			505.00		
Telecom : Telephone : Structured Wiring				1 ea	CES : CES-CLIENT-ISP			Phone/Internet/Video Service					
Telecom : Telephone : Structured Wiring				1 ea	CES : CES-PERMIT : 1063			Wiring Permit Fee -			100.00		
Networking : Device : Controller				1 ea	Pakedge : NK1-CP1			Patroller and Enterprise-class			550.00		
Networking : Device : Router				1 ea	Pakedge : RK-1			5 Port Multi-Media Router with			683.33		
Networking : Device : Switch				1 ea	Pakedge : SX-24P16			24 Port/16-PoE Gigabit Fully			1,283.33		
Networking : Device : Wireless Access				1 ea	Pakedge : WK-2 : 6578			On-Wall 3x3 AC Wireless Access			580.00		
Power : Conditioning : UPS				1 ea	Middle Atlantic : UPS-S500R			Rack Mount, 15Amp, 8-Outlets 1U			528.33		
Power : Conditioning : PDU				1 ea	Panamax : M4315-PRO			15amp BlueBolt Power Conditioner			606.67		
007 Overflow Space												\$1,261.08	
Telecom : Telephone : Structured Wiring				1 ea	CES : CES-NC-WAP			New Construction Wireless					
Networking : Device : Wireless Access				1 ea	Pakedge : WK-2 : 6578			On-Wall 3x3 AC Wireless Access			580.00		
108 Guest Bedroom Closet												\$1,460.25	
Telecom : Telephone : Structured Wiring				1 ea	CES : CES-NC-WAP			New Construction Wireless					
Networking : Device : Wireless Access				1 ea	Pakedge : WK-2-C			In-Ceiling/In-Wall 2x2 AC Wireless			695.00		
109 Back Hall Closet												\$1,460.25	
Telecom : Telephone : Structured Wiring				1 ea	CES : CES-NC-WAP			New Construction Wireless					
Networking : Device : Wireless Access				1 ea	Pakedge : WK-2-C			In-Ceiling/In-Wall 2x2 AC Wireless			695.00		
204 Amelia's Bedroom Closet												\$1,460.25	
Telecom : Telephone : Structured Wiring				1 ea	CES : CES-NC-WAP			New Construction Wireless					
Networking : Device : Wireless Access				1 ea	Pakedge : WK-2-C			In-Ceiling/In-Wall 2x2 AC Wireless			695.00		

Proposal/Project Lists: Improve Delete Check box Graphic icons

Find Proposals		Fav A		B	C	476 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> edmunds.com User: Jim Engandela - 100 - Level: Administrator Location: 1 - EME Audio & Video Systems</div>										<div> Add Proposal</div> <div>Sale Probability</div>					<div>Leave </div> <div>Projects</div> <div>Completed</div>																													
Administrator																																															
Manager																																															
User																																															
		<div><div><div><div></div></div><div>= User Lock</div></div><div><div><div></div></div><div>= Global Proposal</div></div></div>																																													
		Archive Proposal																																													
Status		Dup		Fav		Number		User		View		Client											Company		Proposal Title		Created		Total																		
						2821.1-1.103		Gorno, Dan				Global Sourcing Group Inc.											Conference Room Video		3/5/2018		\$23,149																				
						2819.1-1.104		Last, First				Company											Concord Office Network		3/2/2018		\$51,449																				
						2812.1-1.103		Robledo, Mareesa															Home Theater		2/23/2018		\$32,141																				
						2812.1-1.103		Henry, Jesse				128 Main Street LLC											Groton Inn Restaurant Full		2/5/2018		\$86,661																				
						2809.1-1.103																	Custom Integrated		1/26/2018		\$133,807																				
						2808.1-1.103		Frasier, Daniel															Custom Integrated		1/24/2018		\$55,289																				
						2807.2-1.103		Henry, Jesse				128 Main Street LLC		Groton Inn Restaurant		2/6/2018		\$81,575																													
						2807.1-1.103		Henry, Jesse				128 Main Street LLC		Groton Inn Restaurant		1/22/2018		\$79,261																													

Proposal/Project/Detail by Area screen: Remove double refresh

Discipline		Area		Phase		Fav	Master Project - Detail by Area				QV	Utilities					Home			
Client		Areas		Overviews		Lou Amorati Gilmore Building Co., Inc Murphy Project 2733.5-1.101							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		Entities						Convert	Wire Manager		Change Orders		Grand Total			
Discipline : Category : Type							CO Status		Qty		Make : Model			Description - Finish				Area Totals		
Murphy Project																				
000 Equipment Rack Location																\$15,808.96				
Audio : Distribution : Amplifier						1 ea		Sonance : DSP 2-125					SONARRAY System Amplifier -				800.00			
Audio : Source : Streamer						1 ea		Sonos : Connect : 4220					Wireless Streamer - White				349.00			
Audio : Source : Streamer						C		4 ea		Sonos : CONNECT:AMP : 5111					Wireless Streaming Amplifier -				1,996.00	
Audio : Source : Streamer						A c2		2 ea		Sonos : CONNECT:AMP : 5111					Wireless Streaming Amplifier -				998.00	
Video : Distribution : Structured Wiring						1 ea		CES : CES-SAT-PANEL-16					Sattelite TV Panel -							
Lighting : Control : Dimmer / Switch						C		4 ea		Control4 : C4-SW120277-xx : 6023					Wireless Switch (120V/277V) -				560.00	
Lighting : Control : Dimmer / Switch						D c3		-1 ea		Control4 : C4-SW120277-xx : 6023					Wireless Switch (120V/277V) -				-140.00	
Lighting : Control : Dimmer / Switch						A c3		1 ea		Control4 : C4-APD120-xx : 6022					Wireless Adaptive Phase Dimmer				180.00	
Lighting : Control : Dimmer / Switch						C c6		5 ea		Control4 : C4-KA-XX : 6024					Auxiliary Keypad - White				200.00	

Proposal/Project Print Menu: Improve Memory allocation for printing

<div style="display: flex; justify-content: space-between; align-items: center;"> Printer Setup PDF reDirect Copy Proposal - Print Menu </div>		
Rick Vallarelli J & Co. Fuel America Worcester Coffee House 2827.1-1.103		
<div style="display: flex; justify-content: space-between; align-items: center;"> PDF reDirect Pro v2,winspool,Ne01: <div style="border: 1px solid black; padding: 2px;"> Send Email <input type="checkbox"/> Client <input type="checkbox"/> Manager <input type="checkbox"/> Salesman <input type="checkbox"/> Engineer </div> </div>		<div style="display: flex; justify-content: space-between; align-items: center;"> Done </div>
<div style="display: flex; justify-content: space-between; align-items: center;"> Proposals Costing Projects Purchasing </div>		
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Main Proposal <div style="text-align: right; margin-bottom: 5px;"> Print All Sections </div> </div> <div style="border: 1px solid #ccc; padding: 5px;"> Proposal Sections <div style="display: flex; justify-content: space-between; align-items: center;"> <div> Cover Page Client Intro Overviews Areas & Products <div style="margin-left: 20px;"> No "Like Kind Qty Sums" Product Unit & Ext Prices No Product Prices or Area Totals No Products or Text - Only Area Totals No Products - Only Area Text & Totals <input checked="" type="checkbox"/> Hide Grand Total </div> Product Summary <div style="margin-left: 20px;"> Show Grand Total <input type="checkbox"/> Hide Disciplines Show Discipline Subtotals Show Grand Total <input checked="" type="checkbox"/> Hide Grand Total <input type="checkbox"/> Page Break by Discipline </div> Fees & Services Contract <div style="margin-left: 20px;"> <input type="checkbox"/> Show 2nd Address <input type="checkbox"/> Show Both Addresses </div> Extra Text </div> <div> Shop Info </div> </div> </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Proposal Reports <div style="text-align: right; margin-bottom: 5px;"> Print All Sections </div> </div> <div style="border: 1px solid #ccc; padding: 5px;"> Products By <div style="display: flex; justify-content: space-around; align-items: center;"> <div>Discipline </div> <div>Area </div> <div>Phase </div> </div> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Sub Totals By <div style="display: flex; justify-content: space-around; align-items: center;"> <div>Discipline </div> <div>Area </div> <div>Phase </div> </div> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Grand Total By <div style="display: flex; justify-content: space-around; align-items: center;"> <div>Discipline </div> <div>Area </div> <div>Phase </div> </div> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Product Summary Unit & Ext Price <div style="margin-left: 20px;"> Product Summary - Unit & Ext <input type="checkbox"/> Hide Unit Price <input type="checkbox"/> Hide Disciplines <input type="checkbox"/> Page Break by Discipline </div> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Product Summary - Unit & Ext with Discipline Subtotals & GT <div style="margin-left: 20px;"> <input type="checkbox"/> Hide Unit Price <input checked="" type="checkbox"/> Hide Grand Total <input type="checkbox"/> Page Break by Discipline </div> </div> <div style="border: 1px solid #ccc; padding: 5px;"> Preliminary Contract Preliminary Contract with Options for: Area Text & Totals, Disclaimer Pricing Policy Price Expiry Date No Payments or Terms </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Proposal Supplements <div style="text-align: right; margin-bottom: 5px;"> Print All Sections </div> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Supplements <div style="display: flex; justify-content: space-between; align-items: center;"> <div> Labor Summary Labor Detail List Parts Summary Parts Detail List Wire & Cable Summary Wire & Cable Detail List Fees - Directed to Parts Fees - Directed to Labor </div> </div> </div> <div style="border: 1px solid #ccc; padding: 5px;"> Master Proposal & Supplements <div style="display: flex; justify-content: space-between; align-items: center;"> <div> Discipline Area Products & Only Labor Products & Supplements without Prices Area by Phase Phase </div> </div> </div>

Proposal/Contract: Signature text

You can now change the Proposal Contract Signature text, after the Salesman's name.

Make this change in Master Prefs/Proposals/Proposal Print Options

Electronics & Installation

Equipment	\$7,501.67
Labor	\$3,929.58
Parts	\$592.00
Wire & Cable	\$306.85
Professional Services	\$1,294.23
Total	\$13,624.33
Tax	\$518.78
Grand Total	\$14,143.11

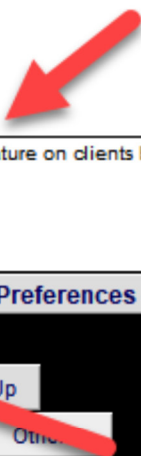
Prices quoted are guaranteed until 6/13/2018

Payment Terms

Deposit	Due when the proposal is accepted and signed.	\$1,414.31
Payment 1	Due 30 days before the installation prewire phase.	\$4,242.93
Payment 2	Due 30 days before the installation trim phase.	\$2,828.62
Payment 3	Due 30 days before the installation final phase.	\$4,242.93
Hold Back	Due upon substantial completion of the project	\$1,414.31

Please Authorize & Return

Date: _____ Jim Youngblood or authorized signature on clients behalf



Horizon SmartPartner Software	Master Preferences - Company Locations										? Home	
	Proposals		POS			Installation	Payments		Leave			
	Tracker	Users	Follow-Up	Difficulty		Groups	Fees					
	Tax	Lists	Bookkeeping	Other	Labor	Parts	Wire	Tasks				
+ New Location												Company Locations
Location 1 Cutting Edge Systems Corp												Delete Location

ABC ✓ Spell	Master Proposal Prefs - Page Prefs - Cover Page				Print	? Home			
Cover Page	Text & Fees	Contracts	Proposal Print Options				Update All Existing Entities	Custom Report Bullet Points & Shop Text	Done
Client Intro	Overviews	Terms							
Shop Intro	Extra Pages	Pricing							

Location 1

Proposal Intro Line >
Stay within border

Show Client's ☐ Yes
Phone Number & eMail ☒ No

Extra Text Line >
Stay within border

Show Salesman's ☐ Yes
Name & Title ☒ No

Global Cover Page Pictures >
*Copy & Paste Images
using the Edit Menu*

CUSTOM AUDIO & VIDEO SYSTEM

Version 1

Designed and Prepared for

John & Mary Smith
120 13th Ave W.
Chicago, IL 64537

Cutting Edge Systems Corp 364 Littleton Rd Westford MA 01886
 Phone: 978-392-1392 Fax: 978-392-1399 sales@cuttingedgehome.com
 Proposal: 1098.1-1.30 June 12, 2002

Contract Signature

Salemsans Name + or authorized signature on clients behalf

Alternate Signature

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

Alt Name Authorized Signature, Cutting Edge Systems Corp x

Alt Title Lighting Designer

Extended Warranty Approval - Decline

☐ Show Extended Warranty Approve/Decline Option

*These are Global features and affects all Proposals in SCPS.
Custom Reports Users should upgrade to Reports 11.1v1*

Proposal Print Menu: Cutting Edge Print Cue

Product Summary - Unit & Ext with Discipline Subtotals and GT.

Printer Setup

PDF reDirect

Copy

Proposal - Print Menu

Jonathan Hyett

Control4 Integrated System
2833.1-1.104

PDF reDirect Pro v2, winspool, Ne01:

Send Email

☐ Client

☐ Manager

☐ Salesman

☐ Engineer

Done

Page Prefs

Print Options

Proposals

Costing

Projects

Purchasing

Main Proposal

Print All Sections

Proposal Sections

Cover Page

Client Intro

Shop Info

Overviews

Areas & Products

No "Like Kind Qty Sums"

Product Unit & Ext Prices

No Product Prices or Area Totals

No Products or Text - Only Area Totals

No Products - Only Area Text & Totals

☒ Hide Grand Total

Product Summary

Show Grand Total

☐ Hide Disciplines

Show Discipline Subtotals

Show Grand Total

☒ Hide Grand Total

☒ Page Break by Discipline

Fees & Services

Contract

☐ Show 2nd Address

☐ Show Both Addresses

Extra Text

Proposal Reports

Print All Sections

Products By

Discipline

Area

Phase

Sub Totals By

Discipline

Area

Phase

Grand Total By

Discipline

Area

Phase

Product Summary
Unit & Ext Price

Product Summary - Unit & Ext

☒ Hide Unit Price

☐ Hide Disciplines

☒ Page Break by Discipline

Product Summary - Unit & Ext
with Discipline Subtotals & GT

☒ Hide Unit Price

☒ Hide Grand Total

☒ Page Break by Discipline

Preliminary Contract

Preliminary Contract
with Options for:

Area Text & Totals, Disclaimer

Pricing Policy Price Expiry Date

No Payments or Terms

Proposal Supplements

Print All Sections

Supplements

Labor Summary

Labor Detail List

Parts Summary

Parts Detail List

Wire & Cable Summary

Wire & Cable Detail List

Fees - Directed to Parts

Fees - Directed to Labor

Master Proposal & Supplements

Discipline

Area

Products & Only Labor

Products & Supplements
without Prices

Area by Phase

Phase

Fast Track
Cover Page, AP,
& Contract

All User Print Cues

User Print Cue 1

User Print Cue 2

Cutting Edge by Discipline - PB - GT


Cutting Edge by Area - No Sum

Cutting Edge by Discipline

Also Remove pop up notice when printing Print Cue



Project/Final CO - Totals Summary: CO List: Show CO Number & Labor Category Subtotals

Final CO - Totals Summary									
Valdur Koha									Done 
Custom Audio & Video System 2122.2c1-1.101									
Master Project Totals:	Equipment	Labor	Parts	Wire	Fees	= Subtotal	Tax	= Grand Total	Balance Due
	\$17,193.87	\$28,565.27	\$13,790.28	\$1,077.18	\$11,862.56	\$72,489.16	\$1,978.83	\$74,467.99	\$74,467.99
2122.2c1-1.101 c1	0.00	0.00	0.00		0.00	0.00	0.00	0.00	\$0.00
			Installation						
			Configuration						
			Programming						
			Parts Labor						
			Wire Labor - Bulk						
			Wire Labor - Precut						
2122.2c3-1.101 c3	740.98	286.53	0.00	54.00		1,081.51	24.69	1,106.19	\$1,106.19
		-103.48	Installation						
			Configuration						
			Programming						
			Parts Labor						
		215.63	Wire Labor - Bulk						
		174.38	Wire Labor - Precut						
2122.2c7-1.101 c7	1,099.98	0.00	0.00			1,099.98	68.75	1,168.73	\$1,168.73
			Installation						
			Configuration						
			Programming						
			Parts Labor						
			Wire Labor - Bulk						
			Wire Labor - Precut						
2122.2c9-1.101 c9	-40,000.00		0.00			-40,000.00	-2,500.00	-42,500.00	-\$42,500.00
			Installation						
			Configuration						
			Programming						
			Parts Labor						
			Wire Labor - Bulk						
			Wire Labor - Precut						
2122.2c4.1-1.10 c4.1	42,877.91	13,254.44	552.78	1,023.18	6,958.24	64,666.55	2,778.37	67,444.92	\$67,444.92
		4,114.13	Installation						
		2,966.93	Configuration						
		5,562.96	Programming						
		51.75	Parts Labor						
			Wire Labor - Bulk						
		558.68	Wire Labor - Precut						
2122.2c6.1-1.10 c6.1	12,475.00	15,024.30	13,237.50		4,904.32	45,641.12	1,607.03	47,248.15	\$47,248.15
		10,505.25	Installation						
		1,725.00	Configuration						
		2,794.05	Programming						
			Parts Labor						
			Wire Labor - Bulk						
			Wire Labor - Precut						

Project/CO List: View only Master Project CO's in list

Show All CO's		Project - All Change Orders					Print		Home		
View Only Final CO's		Valdur Koha					Add a Change Order to this Project		This Project		
View All Final CO - Totals		Scope Theater/TV and Network Update 2122.2-1.101							All Projects		
Show COs from All Projects											

Project/Final CO's: Fix Final CO's vs Master Project Labor subtotals

Printer Setup
 Print
 ?
 Home

Repost CO Totals
 Client Mode ☐

Final CO - Pricing

Valdur Koha
 Done

Pricing
 Labor Rates
 Commission

Tax Summary
 Product Tax
 Fees Tax

Custom Audio & Video System
2122.2c4.1-1.101

Final Change Order - Pricing
 Refresh

Excluded Products Total
 Labor Meter

Show List Price & Discount ☐ yes ☒ no
 Show Sales Tax ☒ yes ☐ no

	Subtotals	Sell	GP%	Cost	Profit	Discount
Equipment	\$42,877.91	40.7%	\$25,448.01	\$17,429.90		
Labor	\$13,254.44	59.0%	\$5,437.59	\$7,816.86		
Parts	\$552.78	52.9%	\$260.40	\$292.38		
Wire & Cable	\$1,023.18	67.1%	\$336.54	\$686.64		
Professional	\$6,958.24	54.9%	\$3,136.19	\$3,822.05		
Total	\$64,666.55	46.5%	\$34,618.72	\$30,047.83		
Tax	\$2,778.37					
Grand Total	\$67,444.92					

Labor Summary










Labor Category	(h:m) Hours	(hourly) Rate	Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	Total
1 - Installation	45:42	\$90.00	\$4,114.13			\$4,114.13
2 - Configuration	24:43	\$120.00	\$2,966.93			\$2,966.93
3 - Programming	37:05	\$150.00	\$5,562.96			\$5,562.96
4 - Parts Labor	0:34	\$90.00	\$51.75			\$51.75
5 - Wire Labor - Bulk		\$150.00				
6 - Wire Labor - Precut	6:12	\$90.00	\$558.68			\$558.68
Total Amount			\$13,254.44			\$13,254.44
(h:m) Total Hours	114:18			0:00	0:00	114:18

Project Change Orders/Only Final CO's: Correctly set CO as Final, when entering a CO from this screen

1		Only Project - Final Change Orders					Print	?	Home
Show All CO's		Brett Hershey					Add New Change Order to This Project		All Projects
View All Final CO Totals		Custom Integrated System 2714.2-1.104							This Project
View Dup	Type CO	Status	Date Created	CO Number	Change Order Title CO Reference Info	CO Total	Pymts Made	View Pymts	Balance Due Del
		Final	6/22/2017	2714.2c3-1.104	Lighting and HVAC Control Update	\$21,133.17	\$0.00		\$21,133.17
				c3					f
		Final	6/14/2017	2714.2c4-1.104	AV System Update	-\$44,351.02	\$0.00		-\$44,351.02
				c4					f
		Final	8/22/2017	2714.2c6-1.104	AV System Update Part 2	\$27,269.67	\$0.00		\$27,269.67
				c6					f
		Final	11/15/2017	2714.2c8-1.104	Remove HVAC Control, Adjust Landscape	-\$11,795.80	\$0.00		-\$11,795.80
				c8					f
		Final	9/12/2017	2714.2c9-1.104	Kitchen Backsplash Trufig	\$340.00	\$0.00		\$340.00
				c9					f
		Final	11/16/2017	2714.2c10-1.104	Final Rack Design Update	-\$0.01	\$0.00		-\$0.01

Discipline		Area		Phase		Fav	Final CO - Detail by Area		QV	Utilities		Home	
Client		Areas		Overviews		Brett Hershey AV System Update Part 2 2714.2c6-1.104				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		Entities	Convert			Wire Manager	Change Orders	Grand Total	
Discipline : Category : Type				CO Status		Qty		Make : Model		Description - Finish		Area Totals	
Custom Integrated System Change Order 2714.2c6-1.104													
000 Equipment Rack Location												-\$11,472.87	
Audio : Amplifier : Multi-channel				D c6		-1 ea		JBL Synthesis : SDA-8300			8 x 300W Multichannel Power		-5,500.00
Audio : Misc : Final Part				D c6		-1 ea		Niles : SPK-1 : 6362			Speaker-Level A-B Switcher -		-139.95
Video : Source : Video Component				A c6		1 ea		CES : CES-GAME			Game System Setup - Client		
Video : Source : Blu-ray Player				A c6		1 ea		Sony : UBPX1000ES/WSUBPRE1			Ultra HD CD/DVD/UHD/Blu-ray		699.99
Surveillance : Recorder : NVR				D c6		-1 ea		ICRealtime : NVR-7508K-8TB			8-Channel 2U Network 4K Video		-5,407.40
Wire & Cable : Pre-Cut Cable :				A c6		2 ea		PLoYnk : XLR-MF-7FT			XLR Female to Male 7 ft Cable		97.00
205 Zone 4 - Living Room												\$38,189.30	
Audio : Speaker : In-wall				A c6		3 ea		CES : CES-BLDR-IW-WHIP-NC			In-Wall Speaker Prewire -		
Audio : Speaker : Floor				A c6		1 ea		CES : CES-CUSTOM-51			Custom 5.1 System and		55,400.00

Project Change Orders/All Project CO's: Correctly set CO as Final, when entering a CO from this screen

All	All - Finalized CO's	Sort	568 CO's	All Change Orders from All Projects				Print	?	Home
Project - Pending CO's	<div></div> <div>User: Jim Engandela - 100 - Level: Administrator Location: 1 - Cutting Edge Systems Corp</div>									Done
Project - Finalized CO's										
Completed - Pending CO's										
Completed - Finalized CO's										
View	Entry	Number	User	CO Status	Finalized	Client	Company	CO Total	Balance Due	
	Completed	1296.7c1-1.101	Final	f	4/7/2015	Schlecht, Martin		-\$1,864.72	-\$1,864.72	
	Completed	1296.7c10-1.101	Final	f	3/26/2015	Schlecht, Martin		\$2,270.82	\$2,270.82	
	Completed	1296.7c11-1.101	Pending	p		Schlecht, Martin		\$7,921.01		
	Completed	1296.7c12-1.101	Final	f	5/5/2015	Schlecht, Martin		\$1,287.45	\$1,287.45	
	Completed	1296.7c13-1.101	Final	f	5/6/2015	Schlecht, Martin		\$4,057.03	\$4,057.03	
	Completed	1296.7c14-1.101	Final	f	5/7/2015	Schlecht, Martin		\$2,279.73	\$2,279.73	
	Completed	1296.7c15-1.101	Final	f	6/11/2015	Schlecht, Martin		\$4,107.53	\$4,107.53	
	Completed	1296.7c16-1.101	Final	f	6/11/2015	Schlecht, Martin		-\$1,011.08	-\$1,011.08	

Discipline		Area		Phase		Fav	Final CO - Detail by Area			QV	Utilities					Home	
Client		Areas		Overviews		Brett Hershey AV System Update Part 2 2714.2c6-1.104					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		Entities				Convert	Wire Manager	Change Orders	Grand Total				
Discipline : Category : Type							CO Status		Qty Make : Model		Description - Finish			Area Totals			
Custom Integrated System Change Order 2714.2c6-1.104																	
000 Equipment Rack Location															-\$11,472.87		
Audio : Amplifier : Multi-channel				D c6		-1 ea		JBL Synthesis : SDA-8300				8 x 300W Multichannel Power			-5,500.00		
Audio : Misc : Final Part				D c6		-1 ea		Niles : SPK-1 : 6362				Speaker-Level A-B Switcher -			-139.95		
Video : Source : Video Component				A c6		1 ea		CES : CES-GAME				Game System Setup - Client					
Video : Source : Blu-ray Player				A c6		1 ea		Sony : UBPX1000ES/WSUBPRE1				Ultra HD CD/DVD/UHD/Blu-ray			699.99		
Surveillance : Recorder : NVR				D c6		-1 ea		ICRealtime : NVR-7508K-8TB				8-Channel 2U Network 4K Video			-5,407.40		
Wire & Cable : Pre-Cut Cable :				A c6		2 ea		PLoYnk : XLR-MF-7FT				XLR Female to Male 7 ft Cable			97.00		
205 Zone 4 - Living Room															\$38,189.30		
Audio : Speaker : In-wall				A c6		3 ea		CES : CES-BLDR-IW-WHIP-NC				In-Wall Speaker Prewire -					
Audio : Speaker : Floor				A c6		1 ea		CES : CES-CUSTOM-51				Custom 5.1 System and			55,400.00		

Master Project/Fees: All Original Project Fees, Final CO and Master Project Fee Totals

Projects created after SCPS version 13.5 will now display the Original Project Fees + Final Change Order Fees = Master Project Fees.

Project created before SCPS version 13.5 will not display the Original Project Fees + Final Change Order Fees = Master Project Fees.

In this case the Fee Totals are displayed on the Master Project Pricing screen and it will necessary to go into each Final CO to view their Fees and total them up manually.

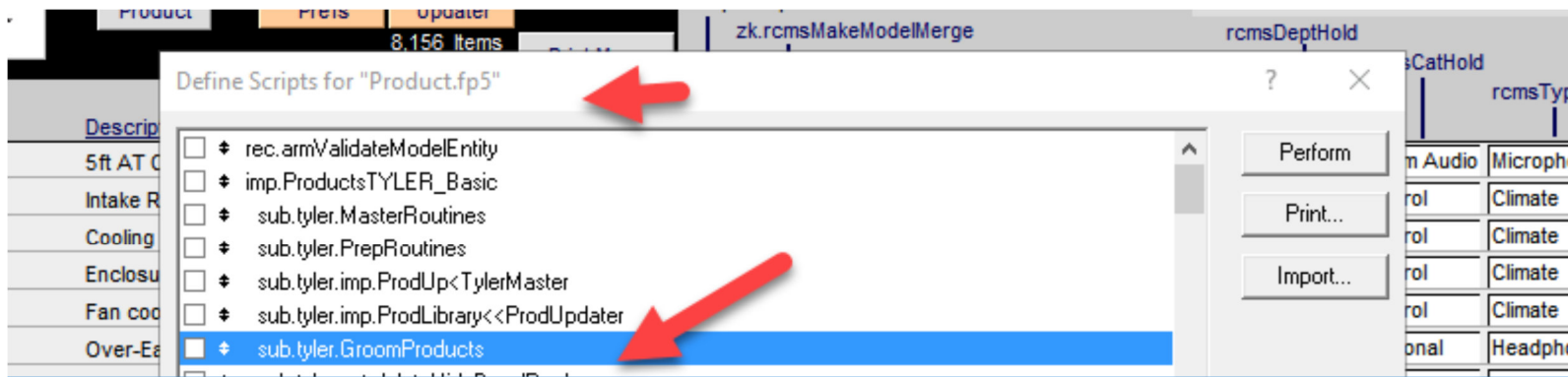
[illegible]

Custom Integrated System
2842.1-1.101

[illegible]

Custom Integrated System
2842.1-1.101

Done 



omProducts"

" sub.tyler.GroomProducts"

```

✦ Set Error Capture [On]
✦ Refresh Window [Bring to front]
✦ #Grooming Routines
✦ # Delete Blank Records
✦ Perform Script [Sub-scripts, "util.deleteProductNoModel [no..."]
✦ Perform Script [Sub-scripts, "srt.pd.makeModel"]
✦ # ClassHold
✦ Replace Contents [No dialog, "pd.class", "Case(pref~one::zf.rcmsDoNotUpdateClass = 1 or zf.rcmsRetainDescript.b = 1,rcmsClassHold, pd.class)"]
✦ If ["0"]
✦   If ["pref~one::zf.rcmsDoNotUpdateClass = 1"]
✦     Replace Contents [No dialog, "pd.class", "Case(zf.rcmsRetainDescript.b = 1,rcmsClassHold, pd.class)"]
✦   End If
✦ End If
✦ # GroupHold
✦ Replace Contents [No dialog, "pd.dept", "Case(pref~one::zf.rcmsDoNotUpdateProdGroups.b = 1 or zf.rcmsRetainGroup.b = 1,rcmsDepthHold,pd.dept)"]
✦ Replace Contents [No dialog, "pd.category", "Case(pref~one::zf.rcmsDoNotUpdateProdGroups.b = 1 or zf.rcmsRetainGroup.b = 1,rcmsCatHold,pd.category)"]
✦ Replace Contents [No dialog, "pd.type", "Case(pref~one::zf.rcmsDoNotUpdateProdGroups.b = 1 or zf.rcmsRetainGroup.b = 1,rcmsTypeHold,pd.type)"]
✦ If ["0"]
✦   If ["pref~one::zf.rcmsDoNotUpdateProdGroups.b = 1"]
✦     Replace Contents [No dialog, "pd.dept", "Case(zf.rcmsRetainGroup.b = 1,rcmsDepthHold,pd.dept)"]
✦     Replace Contents [No dialog, "pd.category", "Case(zf.rcmsRetainGroup.b = 1,rcmsCatHold,pd.category)"]
✦     Replace Contents [No dialog, "pd.type", "Case(zf.rcmsRetainGroup.b = 1,rcmsTypeHold,pd.type)"]
✦   End If
✦ End If
✦ # DescriptionHold
✦ Replace Contents [No dialog, "pd.description", "Case(pref~one::zf.rcmsDoNotUpdateDescriptions.b = 1 or zf.rcmsRetainDescript.b = 1,rcmsDescriptHold,pd.description)"]
✦ If ["0"]
✦   If ["pref~one::zf.rcmsDoNotUpdateDescriptions.b = 1"]
✦     Replace Contents [No dialog, "pd.description", "Case(zf.rcmsRetainDescript.b = 1,rcmsDescriptHold,pd.description)"]
✦   End If
✦ End If
✦ Go to Field [Select/perform, "pd.make"]

```

Product Library/Product Detail/Specs: Improve Product Specific Tyler Retain Options

RCMS - Tyler Product Status

New Item ☐

Existing RCMS Item ☐

RCMS Tyler - Product Import Options

Tyler Do not Delete ☐

RCMS Do Not Delete ☐

Retain SCPS Class ☐

Retain SCPS Group ☐ ?

Retain SCPS Description ☐ ?

Global Pref

☐ Delete Dead Products

☒

☐

Product Library/Product Specs: Add a Replace button to this screen

Entities
using this
WireFind all
Products
in EntitiesAV IQ
Product Info
WebsiteBinary
B5-DIGCOAX-1B5-Series Digital Coax Cable 1 Meter (3.28 ft.)
Wire & Cable : Pre-Cut Cable : Interconnect

Done

Prev Next

Product

Specs

Pix

PDF

Labor

Parts

Wire

Tasks

Data

Product ID: 10945

Product Created By: cheim

Sell Price Updated By: Windows User

Cost Price Updated By: Windows User

General

Finish

Weight

Dimensions

☐ HWD ☐ WHD Height Width Depth Diameter
Product Dimensions

Cut Out Dimensions

Rack Spaces Box Type

Mounting Height Distance from floor

Warranty

Factory Warranty

Extended Warranty

Power Consumption

Consumption

Amp Draw

AC Power

DC Power

Power Output

Power Output watts per channels @ ohms

Power Output watts per channels @ ohms

Power Output watts per channels @ ohms

Product Specification Notes

Standards & Practices

Standard & Practices notes for Pre Cut Wire

RCMS - Tyler Product Status

New Item ☐ Existing RCMS Item ☐

RCMS Tyler - Product Import Options

Tyler Do not Delete ☐RCMS Do Not Delete ☐Retain SCPS Class ☐Retain SCPS Group ☐Retain SCPS Description ☐

Global Pref

☐☒☐

QuickBooks Accounts

QB Global Default
AccountsQB Item Override
Accounts

Sales (Income) Sales

Inventory (Asset Account) Sales

COGS (Cost of Goods) Sales

Sales Tax Account SCPS Sales Tax

Canadian Tax use only

Product Validation

zk.Prod.p Key
10945

zc.validEntity.c

Binary

B5-DIGCOAX-1

B5-Series Digital Coax Cable 1 Meter (3.28 ft.)

Replace Data

POS: Quotation-Work Order-Service Order: Paid Check box

Print Setup		Delete	Duplicate	Add New	POS - Quotation		Sold <input type="checkbox"/> Paid <input checked="" type="checkbox"/>	Home	
Print	Preview	Show List Prices	Show Product Features	Hide Labor Detail Matrix	QUOTATION QT #7197		Convert to a Sales Invoice	Contact	Done
Costing					1 of 1		Set Up	Prev	Next
eMail johncthibault@comcast.net					Label Job Site	Show	Hide	Grand Total: \$3,078.10	
John Thibault 8 Zeus Dr Chelmsford, MA 01824					John Thibault		12/8/2014 Reference #		
Sales Rep		Ship VIA	Payment	Quotation Title		Terms			
Craig Heim			Check			Quotation prices good for 30 days			
Quotation Notes									
Pick	Qty unit	<input type="checkbox"/> Pick Price Cue	Product Description (max 2 lines)		Install (h:m:s)	Unit Price	Ext Price	Tax A B	
	48 ea		TCP - TCP LED12BP40D27K - Elite Series BP40 Replacement LED Lamp		0:02:00	32.34	1,552.32	T T	

Print Setup		Delete SO	Add New	POS - Service Order		Done <input type="checkbox"/> Paid <input type="checkbox"/>	Archive	Home	
Print	Preview	SO #7199		1 of 1		Add RMA	Contact	Done	
eMail lamorati@gilmorebuildingco.com					Label JOB SITE:	Show	Hide	4/26/2018	
Lou Amorati Gilmore Building Co., Inc One Grafton Common, Suite 14 Grafton, MA 01519			Mobile 774.696.3374		Lou Amorati Gilmore Building Co., Inc		Master Tracker Appointment Requested Installer Add Edit Appointment:		
Salesman: Jim Engandela		Contractor:		Contractor Ph:					
Project Manager:		Contact Super:		Super Phone:					
Site Survey By:		Contact Special:		Special Phone:					
Estimate By:		Techs/Subs:							

Print Setup Delete WO/CO Add New		POS - Work/Change Order		Converted Ref: ▼ ▲ ▾ ▴		Home	
Print Hide Labor Detail Matrix		WORK ORDER WO #7200		Done <input type="checkbox"/> Paid <input checked="" type="checkbox"/>		Contact Done	
Preview				1 of 1		Set Up ◀ Prev Next ▶	
eMail		4/26/2018 Label Job Site		Show <input checked="" type="radio"/> Hide <input type="radio"/>		WO Total Time	
Yalcin Ayasil 48 Jonas Brown Circle Concord, MA 01742		Yalcin Ayasil				Master Tracker Appointment Requested Installer <input type="text"/> Add Edit Appointment:	
Job Contact: <input type="text"/> Job Location: <input type="text"/> Job Phone: <input type="text"/> Terms: Payment Due Upon Delivery				Order Written By: Jim Engandela Proposal No: <input type="text"/> Customer No: <input type="text"/>			
				Reschedule <input type="text"/> Reason <input type="text"/>			
Service Requested:							

SCPS 13.4v1 Upgrade

New Features, Enhancements and Fixes

3-20-2018

Logo Screen: New Button Layout for better clarity



SmartPartner SOFTWARE

High Definition Proposal & Project Management System

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

Monday
February 26, 2018

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



















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SCPS Auto Upgrade: Set Supplement and Pure Supplement flags

During the upgrade process the Supplement and Pure Supplement flags are set on all Legacy Supplements.

This enables the Legacy Supplements to behave properly when creating Project Change Orders or Modifying Proposal Supplements

All Supplements		Proposal - Labor Supplements										Phantom Supplement = 		 Print	 ?	 Home			
Areas		Text		Products		Dan Gorno Global Sourcing Group Inc. Conference Room Video System 2821.1-1.103										Degree of Difficulty 1 - 15%		Done 	
Labor		Parts		Wire		Tasks												Labor Details	
All Areas												Labor Total:		67:28:00		\$7,593.83			
Product		Labor assigned to		View		Labor Type		Tax Override ?		Install		Hourly		Labor Time					
Zone - Area		Qty		Make : Model		<input type="checkbox"/> Edit <input type="checkbox"/> Sort		Labor Note		Tax A B		Phases		Rate		(h:m:s) Ext Sell 			
Conference Rooms		4		Crestron : AM-101				Installation		<input type="checkbox"/> E <input type="checkbox"/> T		<input type="checkbox"/>		1		\$110.00 18:24:00 \$2,024.00 <input type="checkbox"/>			
Conference Rooms		4		Crestron : AM-101				Configuration		<input type="checkbox"/> E <input type="checkbox"/> T		<input type="checkbox"/>		1		\$125.00 9:12:00 \$1,150.00 <input type="checkbox"/>			
Conference Rooms		4		Crestron : AM-101				Programming		<input type="checkbox"/> E <input type="checkbox"/> T		<input type="checkbox"/>				\$150.00 0:00:00 \$0.00 <input type="checkbox"/>			
Conference Rooms		4		Crestron : AM-101				Wire Labor - Precut		<input type="checkbox"/> E <input type="checkbox"/> T		<input type="checkbox"/>		1		\$110.00 0:46:00 \$84.33 <input type="checkbox"/>			
Conference Rooms		4		Sanus : CILL2				Installation		<input type="checkbox"/> E <input type="checkbox"/> T		<input type="checkbox"/>		1		\$110.00 9:12:00 \$1,012.00 <input type="checkbox"/>			
Conference Rooms		4		Sanus : CILL2				Parts Labor		<input type="checkbox"/> E <input type="checkbox"/> T		<input type="checkbox"/>		1		\$110.00 18:24:00 \$2,024.00 <input type="checkbox"/>			
Conference Rooms		4		Sony : XBR-75X850E				Installation		<input type="checkbox"/> E <input type="checkbox"/> T		<input type="checkbox"/>		1		\$110.00 9:12:00 \$1,012.00 <input type="checkbox"/>			
Conference Rooms		4		Sony : XBR-75X850E				Configuration		<input type="checkbox"/> E <input type="checkbox"/> T		<input type="checkbox"/>		1		\$125.00 2:18:00 \$287.50 <input type="checkbox"/>			
Conference Rooms		4		Sony : XBR-75X850E				Programming		<input type="checkbox"/> E <input type="checkbox"/> T		<input type="checkbox"/>				\$150.00 0:00:00 \$0.00 <input type="checkbox"/>			

All Supplements		Proposal - Parts Supplements										Phantom Supplement = <input type="checkbox"/>			Print			Home	
Areas		Text		Products		Dan Gorno Global Sourcing Group Inc. Conference Room Video System 2821.1-1.103												Done	
Labor	Parts	Wire	Tasks																
All Areas												Parts Total:		\$559.96					
Product																			
Parts assigned to					View	Parts	Parts		Install	Tax									
Zone - Area	Qty	Make : Model		Edit	Qty	Make : Model		Phase	A	B			Unit Sell	Ext Sell					
Conference Rooms	4	Sanus : CILL2			4 ea	CES : CES-MOUNT-MATERIALS		3	T	T			\$100.00	\$400.00	<input type="checkbox"/>				
Conference Rooms	4	Sanus : CILL2			4 ea	Sanus : CIASP1		1	T	T			\$39.99	\$159.96	<input type="checkbox"/>				

All Supplements		Proposal - Wire Supplements										Adjust Bulk Wire - Home Runs		?							
Areas		Text		Products		Dan Gorno Global Sourcing Group Inc. Conference Room Video System 2821.1-1.103						Wire Detail		5000 Sq Ft		Done					
Labor		Parts		Wire		Tasks								Wire Summary		Adjust Bulk Wire - Room Runs		100 % Update		Wire Manager	
All Areas		Wire Supplements										Itemized Wires = No		Wire Total:		\$179.36					
Product		Wire assigned to		View		Class		Bulk Run		Wire		Wire & Cable		No		Tax					
Zone - Area		Qty Make : Model		Edit		<input type="checkbox"/> Sort		Type		Qty		Make : Model		Labor		Phz A B		Unit Sell		Ext Sell	
Conference		4 Crestron : AM-101				Pre-Cut				4 ea		Binary : B6-4K-1				1 T T		\$34.99		\$139.96	
Conference		4 Crestron : AM-101				Pre-Cut				4 ea		Generic : PATCH-CAT6-7FT				1 T T		\$9.85		\$39.40	

SCPS Logo Screen/Utility/Clean Main Records: Improve Deletion of blank Proposal/Project Records

Now all blank or corrupted records are properly deleted.

**Unlock Entity Limits**

Only one User is allowed in a Proposal, Project or Completed at a time. If for some reason this lockout is preventing normal operations then click on the Unlock button to release the limits.

**Reset Pick Product Mechanism**

If a user crashes out of SCPS while picking products into a proposal, this will unlock the pick product mechanism.

**Reset Find Entity - Value Lists**

This utility will clear the pop up value lists in the Find Proposals, Projects, Archive utility.

**Export Project Invoices & Estimates**

To a QB File named QBBatch.iif)

You will be prompted to store this file in the desired location

**Update Proposal and Project AlphaFinder**

This utility will update all of the Proposal and Project Keys so that they will show up in the Proposal and Project lists when using the AlphaFinder.

**Clear All Proposal/Project Pure Labor Supplements Options Flags**

This utility will clear all of the Proposal and Projects Pure Labor Supplements "Options" flags.

**Clean all Proposals & Projects by Deleting all Blank Records**

This Utility will clean all of the Proposals & Projects in your SmartPartner software by Deleting all Blank records not being used.

**Update Change Order Totals**

This utility will update all of the Posted Totals on the Change Order screen for each Project in SCPS.

			1023.1-1.1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Palter, Gilbert & Elisa	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-	Angus, Hamish	Custom Electronics
			.1-	Angus, Hamish	Custom Electronics
			.1-	Lee, David	Custom Electronics
			.1-	Lee, David	Custom Electronics
			.1-	Lee, David	Custom Electronics
			.1-	Lee, David	Custom Electronics
			.1-	Glaser, Don & Carol	Custom Electronics
			.		Custom Electronics
			.		Custom Electronics
			.		Custom Electronics
			.		Custom Electronics

			1023.1-1.1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Palter, Gilbert & Elisa	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-1	Lipson, Ken	Custom Electronics
			.1-	Angus, Hamish	Custom Electronics
			.1-	Angus, Hamish	Custom Electronics
			.1-	Lee, David	Custom Electronics
			.1-	Lee, David	Custom Electronics
			.1-	Lee, David	Custom Electronics
			.1-	Lee, David	Custom Electronics
			.1-	Glaser, Don & Carol	Custom Electronics
			.		Custom Electronics
			.		Custom Electronics
			.		Custom Electronics
			.		Custom Electronics

SCPS Upgrade Utility Screen: New screen layout for better clarity and clear previous Stop Date & Time

Clear previous Stop Date and Stop Time

Automatic SmartPartner Upgrade Utility



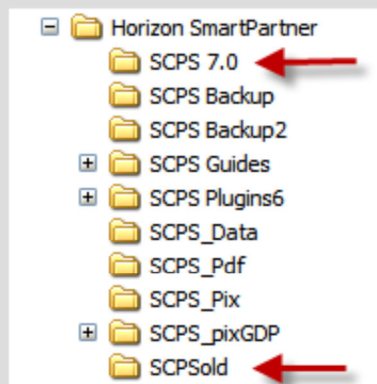
Upgrade Guides

Use this utility to upgrade your SmartPartner Software to a newer version
Close all other applications and follow these important steps

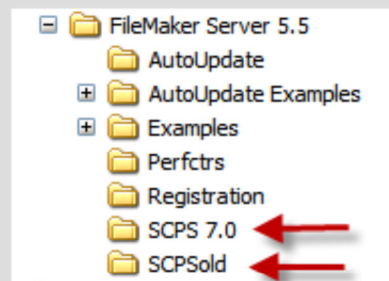
Exit the SCPS Utility

1. Download the SCPS Upgrade and UnZip the downloaded SCPS Upgrade file
2. Open the **new SCPS** folder to make sure the **SCPS files** reside directly in the folder and **not buried** inside another folder
3. Place the **new SCPS** folder in the **Horizon** folder, along with your **current SCPS** folder. (see Illustrations)
4. Rename your **current** folder exactly to **SCPSold** (no spaces or numbers).
5. Open the **Upgrade** file inside the **new SCPS** folder and click the **Start Upgrade Process** button.

Required Folder Structure and Names for FileMaker Pro Installation



Required Folder Structure and Names for FileMaker Server Installations

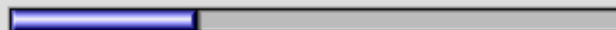


Click [here](#) to start Upgrade Process to...

SCPS Version 13.4vB1

Use this utility to upgrade your SmartPartner Software to a newer version
Close all other applications and follow these important steps

Populating Labor.fp5



Please be patient and wait until the "Upgrade Completed" notice appears

The upgrade process can take some time, especially if your files have a large number of records.
If the upgrade is not successful, make sure your SCPS files are not buried in a folder, inside
the new SCPS folder and that your current SCPS folder is exactly named "SCPSold". Then try again.

Please call Horizon Software at 715-287-3335 if you need technical assistance

Upgrade Start & End

2/26/2018 Upgrade Start Date
7:59 AM Upgrade Start Time

Upgrade End Date
Upgrade End Time

When entering the Proposal Print Menu the Proposal Name is automatically copied into memory so you can Paste it into the File Name field when creating a PDF file of the Proposal.

You can also click on the Copy button on the Proposal - Print Menu screen to copy the Proposal Name into memory.

You now have the option to change the formatting of Proposal Name in Master Prefs/Other/Proposal 1 screen.

Formats:

2819.1-1.104 Last, First Company

Last, First Company 2819.1-1.104

Master Prefs - Other - Proposals 1

?

Home

Proposal 1	Projects 1	Products 1	Misc 1	3rd Party 1	Counters	FileMaker
Proposal 2	Project CO	Products 2	Misc 2	3rd Party 2	Graphics	Networking

Done

Entering Proposal/Project/Completed/Archive Lists

No Proposal "New or View" Prompt

Sort Proposals & Projects

Descending = Highest to Lowest number
Ascending = Lowest to Highest number

Proposal & Project Sort Order

Descending Order

Proposal Printing

Show Print Dialog

When printing Proposal Sections

PDF Printing Delay between sections

00:00:05

seconds

Print Cue - All Users

Cutting Edge by Discipline - PB

Print Cue - Default 1

Cutting Edge by Area - No Sum

Print Cue - Default 2

Cutting Edge by Discipline

Turn Off Footer Copyright Notice

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Copy and Paste Proposal File Name Format

Proposal Number - Last Name - First Name

Last Name - First Name - Proposal Number

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

Duplicate Contact Delete Contact **&, Dr. Geoffrey Block Martha Persky** Print - Export Menu New Proposal Done

Details Info Com Log Entities Files & Pix Transactions + New Contact New POS Prev Next 1 of 7119

Labels

Category Class Key ID Fav ☐

? Create Vendor and Assign Product Makes Group Status Staff Tickler Tag ☐

Fav	Print	Company	Account ID	Web Address	Web
Contact	Contact				
<input checked="" type="radio"/>	<input checked="" type="radio"/>	Martha Persky			
<input type="radio"/>	<input type="radio"/>	Title	First Name	Last Name	Email
<input type="radio"/>	<input type="radio"/>		Dr. Geoffrey Block	&	
<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"/>				

Contact Library: New Proposal & POS Home Button with Blank Record Auto Delete

Remove Cancel button and change it to a Home button with a pop up message and auto deletion of blank Contact Records

Find Contacts Fav A B C **Contact Manager** ? Home

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

Clients Users Vendors Locations Contractor **Pick or Add a New Contact** 7119 of 7119 Contacts + New Contact





Pick Contact	Name	Company	Category	Fav Phone	Info	View	Fav
	- Residence #9 (#201), North Creek	Western Development Group		(H) 303-321-5700			<input type="checkbox"/>
	1600 Glenarm Place (FN)	Red Peak Properties		(H) 303-321-7325			<input type="checkbox"/>
	A Room Of My Own (FN)	Earth And Sky Architecture		(H) 720-956-1643			<input type="checkbox"/>
	Aarestad, Norm and Margret			303-755-3756			<input type="checkbox"/>
	Aaron, Dwayne			(303)471-5419			<input type="checkbox"/>
	Abarca, Marco			(303)433-2735			<input type="checkbox"/>
	Abaytes, Ron			720-327-0591			<input type="checkbox"/>
	Abbatiello, John & Gail						<input type="checkbox"/>
	Abbott, Herb			303-704-5550			<input type="checkbox"/>
	Abbott, Mark			919.946.8119			<input type="checkbox"/>

Message

Are you sure you want to Exit the Proposal/POS process and go to the Home screen?

Home Cancel

Proposal Screens: Speed up Proposal Detail, Pricing and Discipline-Areas-Phases screen refreshing

Find Proposals		Fav A		B	C	477 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: Jim Engandela - 100 - Level: Administrator Location: 1 - EME Audio & Video Systems</div>																				+ Add Proposal		Leave																
 Administrator																							Sale Probability		Projects																
 Manager																																									
 User																																									

Client Mode ☐

Proposal - Pricing

Printer Setup

Print

? Home

Mareesa Robledo

Done

Pricing

Labor

Commissions

Tax Summary

Product Tax

Fees Tax

Home Theater

2812.1-1.103

Proposal - Pricing

Refresh

Excluded
Products Total

Labor Meter

Show List Price & Discount ☐ yes ☒ noShow Sales Tax ☒ yes ☐ noAdjust
Total
Prices

Subtotals	Sell	GP%	Cost	Profit	Discount	Total Labor Time
Equipment	\$18,031.95	48.7%	\$9,242.64	\$8,789.31		61:14:42
Labor	\$8,162.62	41.3%	\$4,793.62	\$3,369.01		
Parts	\$1,029.27	42.7%	\$589.33	\$439.94		
Wire & Cable	\$850.88	56.9%	\$366.42	\$484.46		
Professional Services	\$2,821.54	52.9%	\$1,329.64	\$1,491.91		
Total	\$30,896.27	47.2%	\$16,321.64	\$14,574.63		
Tax	\$1,244.51					
Grand Total	\$32,140.77					

Proposal Equipment - Price Adjuster

Restore
All Prices
to Original SellAdjust Prices
by individual
Products

\$18,031.95

Discountable
Equipment Sell TotalSet
All Prices
to Minimum SellSet Sell Price
Adjustment
based on \$ Amount

Adjustment Type:

Percentage %:

Set All Prices
to Adjustment\$ ±

Price Adjustments will be applied to all selected Equipment in this Proposal,
except those products that are checked "Do Not Discount" or "No Disc't"

Global Adjustments will override all Individual Equipment Price Adjustments

To Adjust Prices by Group, Make, Model, Area or Phase, Click "Adjust Prices by Products" button

If a product has a List price, the discount will be the difference between the List price and the Sell price.

If a product does not have a List price, the discount will be the difference between the Original Sell Price and Adjusted Sell price.

Labor Summary

Labor Category	(h:m) Hours	(hourly) Rate	Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	Total
1 - Installation	28:27	\$110.00	\$3,130.84			\$3,130.84
2 - Configuration	5:27	\$125.00	\$682.81			\$682.81
3 - Programming	2:18	\$150.00	\$345.00			\$345.00
4 - Parts Labor	4:47	\$110.00	\$527.02			\$527.02
5 - Wire Labor - Bulk	17:52	\$180.00	\$3,218.75			\$3,218.75
6 - Wire Labor - Precut	2:20	\$110.00	\$258.19			\$258.19
Total Amount			\$8,162.62			\$8,162.62
(h:m) Total Hours			61:14	0:00	0:00	61:14

Client Mode <input type="checkbox"/>			Proposal - Pricing			Printer Setup Print ? Home		
			Mareesa Robledo			Done		
Pricing	Labor	Commissions						
Tax Summary	Product Tax	Fees Tax	Home Theater 2812.1-1.103					
Proposal - Pricing Refresh 								
Excluded Products Total <div style="border: 1px solid black; padding: 2px; display: inline-block;">Labor Meter</div>		Show List Price & Discount <input type="radio"/> yes <input checked="" type="radio"/> no Show Sales Tax <input checked="" type="radio"/> yes <input type="radio"/> no						
		Subtotals	Sell	GP%	Cost	Profit	Discount	Total Labor Time
		Equipment	\$18,031.95	48.7%	\$9,242.64	\$8,789.31		61:14:42
		Labor	\$8,162.62	41.3%	\$4,793.62	\$3,369.01		
		Parts	\$1,029.27	42.7%	\$589.33	\$439.94		
		Wire & Cable	\$850.88	56.9%	\$366.42	\$484.46		
		Professional Services	\$2,821.54	52.9%	\$1,329.64	\$1,491.91		
Adjust Total Prices		Total	\$30,896.27	47.2%	\$16,321.64	\$14,574.63		
		Tax	\$1,244.51					
		Grand Total	\$32,140.77					
Proposal Equipment - Price Adjuster								
Restore All Prices to Original Sell <div style="border: 1px solid black; padding: 2px; display: inline-block;">Adjust Prices by individual Products</div>		<div style="border: 1px solid black; padding: 2px; display: inline-block;">\$18,031.95</div> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-left: 5px;"> <input type="checkbox"/> Discountable Equipment Sell Total </div>			<div style="border: 1px solid black; padding: 2px; display: inline-block;">Set All Prices to Minimum Sell</div> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-left: 5px;"> Set Sell Price Adjustment based on \$ Amount \$ <div style="border: 1px solid black; width: 50px; height: 20px; display: inline-block;"></div> ± </div>			
		Adjustment Type: <div style="border: 1px solid black; width: 100px; height: 20px; display: inline-block;"></div>		<div style="border: 1px solid black; padding: 2px; display: inline-block;">Set All Prices to Adjustment</div>				
		Percentage %: <div style="border: 1px solid black; width: 100px; height: 20px; display: inline-block;"></div> ±						
Price Adjustments will be applied to all selected Equipment in this Proposal, except those products that are checked "Do Not Discount" or "No Disc't" Global Adjustments will override all Individual Equipment Price Adjustments To Adjust Prices by Group, Make, Model, Area or Phase, Click "Adjust Prices by Products" button If a product has a List price, the discount will be the difference between the List price and the Sell price. If a product does not have a List price, the discount will be the difference between the Original Sell Price and Adjusted Sell price.								
Labor Summary								
Labor Category	(h:m) Hours	(hourly) Rate	Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	Total		
1 - Installation	28:27	\$110.00	\$3,130.84			\$3,130.84		
2 - Configuration	5:27	\$125.00	\$682.81			\$682.81		
3 - Programming	2:18	\$150.00	\$345.00			\$345.00		
4 - Parts Labor	4:47	\$110.00	\$527.02			\$527.02		
5 - Wire Labor - Bulk	17:52	\$180.00	\$3,218.75			\$3,218.75		
6 - Wire Labor - Precut	2:20	\$110.00	\$258.19			\$258.19		
Total Amount			\$8,162.62			\$8,162.62		
(h:m) Total Hours			61:14	0:00	0:00	61:14		

Proposal/Print Menu: Automatically copy Proposal/Project Number and Client Name

1289.1-1.100 Mr. & Mrs. Christenson North American Fly LTD

Discipline		Area		Phase		Fav	Proposal - Detail by Area			QV	Utilities		Home
Client		Areas		Overviews		Mr. & Mrs. Christenson North American Fly LTD Home Entertainment System 1289.1-1.100					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							Entities	Convert	Wire Manager
Discipline : Category : Type							Qty	Make : Model			Description : Finish		Area Totals
Home Entertainment System													
Breakfast Room													\$7,300.00
Audio : Multi-room : Keypad							2 ea	Linn : 5101 Personal Handset : SKU1			Universal learning remote - Black		780.00

Proposal/Print Menu: Product Summary Reports -Hide Unit Price option

You can now Hide the Unit Price on the Proposal Product Summary by Discipline Reports

Printer Setup			PDF reDirect			Copy			Proposal - Print Menu		
PDF reDirect Pro v2,winspool,Ne01:									Dan Gorno		
									Global Sourcing Group Inc.		
									Conference Room Video System		
									2821.1-1.103		
Proposals			Costing			Projects			Purchasing		
									Send Email		
									<input type="checkbox"/> Client <input type="checkbox"/> Manager		
									<input type="checkbox"/> Salesman <input type="checkbox"/> Engineer		
									Done		
									Page Prefs		
									Print Options		
Main Proposal									Proposal Reports		
Print All Sections									Print All Sections		
Proposal Sections									Products By		
Cover Page									Discipline Area Phase		
Client Intro Shop Info											
Overviews									Sub Totals By		
Areas & Products									Discipline Area Phase		
No "Like Kind Qty Sums"									Grand Total By		
Product Unit & Ext Prices									Discipline Area Phase		
No Product Prices or Area Totals											
No Products or Text - Only Area Totals									Product Summary		
No Products - Only Area Text & Totals									Unit & Ext Price		
<input type="checkbox"/> Hide Grand Total									Product Summary - Unit & Ext		
Product Summary									<input checked="" type="checkbox"/> Hide Unit Price		
Show Grand Total									<input type="checkbox"/> Hide Disciplines		
<input type="checkbox"/> Hide Disciplines									<input type="checkbox"/> Page Break by Discipline		
Show Discipline Subtotals									Product Summary - Unit & Ext with Discipline Subtotals & GT		
Show Grand Total									<input checked="" type="checkbox"/> Hide Unit Price		
<input type="checkbox"/> Hide Grand Total									<input type="checkbox"/> Hide Grand Total		
<input type="checkbox"/> Page Break by Discipline									<input type="checkbox"/> Page Break by Discipline		
Fees & Services									Preliminary Contract		
Contract									Preliminary Contract		
<input type="checkbox"/> Show 2nd Address									with Options for:		
<input type="checkbox"/> Show Both Addresses									Area Text & Totals, Disclaimer		
Extra Text									Pricing Policy Price Expiry Date		
									No Payments or Terms		
									Proposal Supplements		
									Print All Sections		
									Supplements		
									Labor Summary		
									Labor Detail List		
									Parts Summary		
									Parts Detail List		
									Wire & Cable Summary		
									Wire & Cable Detail List		
									Fees - Directed to Parts		
									Fees - Directed to Labor		
									Master Proposal & Supplements		
									Discipline		
									Area		
									Products & Only Labor		
									Products & Supplements without Prices		
									Area by Phase		
									Phase		

Product Summary



		<u>Ext Price</u>
Video		
4 ea	Creston : AirMedia™ Presentation Gateway <i>With AirMedia™ anyone can walk into a room and wirelessly present PowerPoint®, Excel®, Word and PDF documents, as well as photos, on the room display from their personal iOS® or Android™ mobile device. MacBook® and PC laptops can be connected seamlessly as well, making presentations from most any device fast and easy. There are no wires to hook up, no complicated settings to configure, and no AV or control system is required. Simply connect via the local Wi-Fi® network and start sharing content from your portable device.</i>	\$4,019.36



Product Summary

		<u>Unit Price</u>	<u>Ext Price</u>
Video			
4 ea	Creston : AirMedia™ Presentation Gateway <i>With AirMedia™ anyone can walk into a room and wirelessly present PowerPoint®, Excel®, Word and PDF documents, as well as photos, on the room display from their personal iOS® or Android™ mobile device. MacBook® and PC laptops can be connected seamlessly as well, making presentations from most any device fast and easy. There are no wires to hook up, no complicated settings to configure, and no AV or control system is required. Simply connect via the local Wi-Fi® network and start sharing content from your portable device.</i>	\$960.00	\$4,019.36
4 ea	Sony : 75" Class 4K Ultra HD Android TV <i>There are 4K Ultra HD TVs, and then there is Sony's 4K Ultra HD TV with four times the clarity of HD, more brilliant expanded color and up to 3x the brightness range of standard LED HDTVs. Breathtaking detail is depicted with pinpoint accuracy for the most natural images. It's quite simply the most immersive, highest resolution TV experience possible.</i>	\$1,896.13	\$7,584.53



Equipment	11,424.53
Labor	4,557.83
Parts	
Wire & Cable	179.36
Total	16,161.72

And you can set this option as a Default in the Master Prefs - Proposal Print Options screen.

Printer Setup

Master Prefs - Proposal Print Options

PDF reDirect Pro v2,winspool,Ne01:

Home

Done

All Proposal Reports

☐ Footers - Hide Client Initials

☒ Footers - Use Salesman's Email instead of Shop Email

Overviews - Page Breaks

☒ Page Break after each Overview

Areas & Products Report - Formatting

☐ Yes

☒ No

Page Break after each Area

☐ Sort Areas = Zone/Location/Placement/Area

Normal Sort = Location/Zone/Placement/Area

☐ Hide Area Text and Show Products

☐ Show Area Text and Hide Products

☐ Hide Products Disciplines

☐ Show Product Install Notes

Product - Line Listing

Make : Description

Product - Features Text

☐ All

☐ Areas & Products Report

☐ None

☒ Product Summary Report (recommended)

Product - Pictures

☐ All

☐ Areas & Products Report

☐ None

☒ Product Summary Report (recommended)

Product Summary by Discipline Report

☒ Hide Unit Price

☐ Page Break by Discipline

☐ Hide Grand Totals and Tax

Fees Report - Pricing

☐ Yes

☒ No

Show Fees Item Prices

☐ Yes

☒ No

Show Fees Sub & Grand Totals

No = Parts & Labor Totals - Directed Fees will not Show

Fees Report - Parts and Labor Totals Directed to Fees

☒ Hide - Parts Directed Fees - Label & Amount

☒ Hide - Labor Directed Fees - Label & Amount

Payment Schedule

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

☐ Labor

☐ Parts

☐ Wire & Cable

☐ Hide Proposal Contract - Payment Schedule

☐ Hide Change Order - Payment Schedule

Alt Name

Alt Title

Authorized Signature, Cutting Edge

Extended Warranty Approval - Decline

☐ Show Extended Warranty Approve/Decline Option

Contract

☐ Show 2nd Address

☐ Show Both Current & Job Site Address

Labor Listing

☐ Do not show Labor Hours on Proposal Reports

☐ Do not show DOD on Labor Detail Report

Project Shop - Staging Reports

☒ Hide Pricing on Shop Staging Reports

Proposal/Products: Orphaned Product Indicator and Sort Orphans button

Products in a Proposal that no longer exist in your Product Library now display a Red Indicator. Your Proposal products are fine.

An Orphans button sorts all Orphaned Products to the top of the list.

Show AllOrphans

Proposal - Products

Client Mode

AreasTextProducts

LaborPartsWireTasks

Switch Tagged ProductsUpdate Orphaned Products

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

Price AdjusterInstall NotesAdd Products

Update All ProductsInstall PhasesDelete All Option Products

Zone - Area

No Exclude Hide Option
Discount Price Price Product Tags

Set Set Set Set Set Set

Show Show Show Show Show Show

Pix

Switch Product Change Group

View DisciplinePhase CO#

Make CategoryFinish "Like Kind" ?
Unit No Qty Sum

Model TypeDescription Comment

Product LaborUnit ListUnit Sell

Parts LaborUnit CostGP%Ext

Wire LaborUpdated

1 - Home Theater

Orphan

1

Runco

610

DLP Video Projector

110

4,797.00

3,997.50

-20.0%

Video

3 Final

EA

DLP Projector

100

1 - Home Theater

148

234.00

195.00

-20.0%

750

8/8/2011

1 - Home Theater

80

1,650.00

1,375.00

-20.0%

480

8/8/2011

1 - Home Theater

288

597.00

497.50

-20.0%

206

8/8/2011

Audio

3 Final

Black PR

Speaker

Bookshelf

Bookshelf loudspeakers:

Message

A red icon indicates that this is an Orphaned Product that no longer exists in the Product Library.

Prior to SCPS 9.3 if you changed the Model number on a product in the

OK

Proposal/Area Text: Change line spacing to 1.00 to match printout line spacing

The line spacing in the Text field now matches the Proposal Print Out line spacing

Clear All Area Text

Proposal - Area Text

Client Mode ☐

?

Home

Areas

Text

Products

Labor

Parts

Wire

Tasks

Dave Dowling

Home Entertainment System

1313.1-1.100

Done

Pick	1 - Pick Area	2 - Pick Text Category	3 - Pick (Commercial Sound) Text
	<div>Attic</div>	<div>Audio</div> <div>Category</div> <div>Commercial Sound</div> <div>Control</div> <div>Installations</div> <div>Jacks</div> <div>Racks</div> <div>Rooms</div> <div>Security</div> <div>Systems</div> <div>Vacuum</div> <div>Video</div>	<div>Church sound systems</div> <div>Mic/gooseneck</div> <div>Resturant sound systems</div>

Products in: Attic

Green fields = Editable WO Product Install Notes

Gray fields = Permanent Product Install Notes

ABC

✓

Clear Text

Proposal - Area Text for: Attic

?

Add to Library

+

Creston : AADS-XM

This area includes the following products and features.

Restaurant sound systems require a special design to create a sense of intimacy. music must sound pleasant, relaxing and unobtrusive. paging must be clear and intelligible. the sound system must be easy to use and clearly labeled. all of the electronics must be conservatively rated for maximum reliability and long term stability. the system must also be flexible and expandable to meet future needs. the design, colors, materials, and installation must be visually unobtrusive and blend harmoniously with the decor of the restaurant.

0 100 200 300 400 500 600 700

Printer Setup

Print Overview, Area & Product WO Install Notes

Edit Old Overview

Area Text View and Work Order - Overview, Area, Product Install Notes

zi.propNameFull.c
zi.propCompany.c
zi.propDescript.c
zi.propFull.c

Product Install Notes

Done

Green Fields are Editable

Pick Zone 1 - Pick Area

Work Order - Overview - Install Notes

prop.zo

zi.propArea

zi.propInstallerInstructions

mTot~mProp~mProfitArea

Work Order - Product Install Notes for:

<<zx.zoneArea.g>>

CO#

Work Order- Area - Install Notes for: <<zx.zoneA

zi.mProdMakeModel.cc

pd.installLocation

pd.installNotesPerm.c

prop area textShop

Paragraph

Alignment

☒ Left

☐ Center

☐ Right


☐ Justified

Tab...

Proposal/Pricing/Tax Summary: Increase size of Tax fields

Tax field size has been increased to display more digits.

Mareesa Robledo

Done 

Pricing	Labor Rates	Commissions
Tax Summary	Product Tax	Fees Tax

Home Theater
2812.1-1.103Includes Both
Bulk & Pre-Cut Wire

Tax Summary

	Sell	Tax A		Tax B	Total Tax
Equipment	\$18,031.95	\$1,127.00	+	\$0.00 =	\$1,127.00
Labor	\$8,162.62	\$0.00	+	\$0.00 =	\$0.00
Parts	\$1,029.27	\$64.33	+	\$0.00 =	\$64.33
Wire & Cable	\$850.88	\$53.18	+	\$0.00 =	\$53.18
Professional Services	\$2,821.54		+	=	
Total	\$30,896.27	\$1,244.51	+	\$0.00 =	\$1,244.51

Tax Rate

Location	A Tax Rate		B Tax Rate	Total Tax Rate
MA Sales Tax	6.250%	+	0.000%	6.250%

Tax Status by Subtotal

	A Tax Rate	B Tax Rate
Products	T Taxable	T Taxable
Labor	E Exempt	T Taxable
Misc Parts	T - Taxable	T Taxable
Bulk Wire & Cable	T - Taxable	T Taxable
Pre-Cut Wire & Cable	T Taxable	T Taxable

Sales Tax - Print Options


Show Sales Tax ☒ Yes ☐ NoContract Tax Totals Option
 Include Sales Tax in the Grand Total ☐ Yes ☐ No
 Do not show tax separately
 blank = no

Change Order/Select CO Quantity screen: Remove pop up value list

The Net Product Qty field is a display field and not a data entry field, so the pop up value list has been removed.

Pending Change Order - Select CO Quantity

Kelly & John Webb
Music Room (Carter's Bedroom)

Continue 

Accessories : : Cables/connector

Original Project Product

Make
Model
SKU
Finish
Description

Original Project Quantity Original Project Product Sell

Change Order Product

Change Order Conditions

Quantity cannot be Empty or 0

Negative Qty items cannot be greater than the Original Qty.

Negative Qty items Price must be the same as the Original Sell Price.

Add or Subtract
a Quantity

Change Order
Product Sell Price

Change Order Notes for this Product

Project Net Product Qty

2

-10

-9

-8

-7

-6

-5

-4

-3

-2

-1

1

2

3

4

5

6



Products, Parts and Wires Staging Reports now correctly display Quantities that include both positive and negative quantities from Change Orders.

Products, Parts and Wires that have a 0 Quantity are no longer shown on these reports.

FileEditViewInsertFormatRecordsScriptsWindowHelp

2/21/2018

Cutting Edge Systems Corp - Confidential Report

Staging Document - Parts

Mark Levin

Gym Audio Upgrade

2799.2-1.104

Page 1

Total Qty

Sorted by Discipline

Phase-Class	Qty	Make-Model-Finish SKU Description Unit Cost-Unit Sell		Ck	InStock	OnOrder	Date	Initial
1 Prewire Part	2 pr	Audio	Order	<input type="checkbox"/>				
		Leon : DsFMB :	Re'vd	<input type="checkbox"/>				
		FlexMount Bracket: Articulating bracket	Re'vd	<input type="checkbox"/>				
		Stock	<input type="checkbox"/>					
		Delivered	<input type="checkbox"/>					
#								
3 Final Part	ea	Audio	Order	<input type="checkbox"/>				
		Xantech : 283D :	Re'vd	<input type="checkbox"/>				
		0173	Re'vd	<input type="checkbox"/>				
		Blink IR Emitter	Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
#								

Cutting Edge Systems Corp - Confidential Report

2/21/2018

Staging Document - Wire

Page 1

Total Qty
Sorted by Make-ModelMark Levin
Gym Audio Upgrade
2799.2-1.104



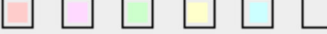


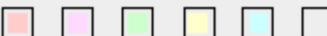


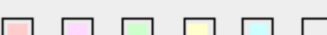
Phase-Class	Qty	Make-Model-Finish SKU Description Unit Cost-Unit Sell		Ck	InStock	OnOrder	Date	Initial
3 Final	3 ea	Binary : B3-StereoMiniRCA-2 :	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		B3 Series 3.5mm Mini Stereo to Dual RCA	Rc'vd	<input type="checkbox"/>				
			Rc'vd	<input type="checkbox"/>				
			Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						
3 Final	4 ea	Binary : B3-Y-RCA-1M2F :	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		B3-Series 1-Male to 2-Female RCA	Rc'vd	<input type="checkbox"/>				
			Rc'vd	<input type="checkbox"/>				
			Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						
3 Final	2 ea	Binary : B5-A-D-1 :	Order	<input type="checkbox"/>				
Pre-Cut Wire & Cable		B5-Series 1-Male to 2-Female RCA Meter (3.28	Rc'vd	<input type="checkbox"/>				
			Rc'vd	<input type="checkbox"/>				
			Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						
1 Prewire	0 ft	Generic : 12-2-SPK :	Order	<input type="checkbox"/>				
Bulk Wire & Cable		1536	Rc'vd	<input type="checkbox"/>				
		12-2 Speaker Wire	Rc'vd	<input type="checkbox"/>				
			Stock	<input type="checkbox"/>				
			Delivered	<input type="checkbox"/>				
		#						

Project/Print Menu/Shop/Staging Reports: Fix blank Qty fields

3 Final Part	ea	#	Xantech : 283D :	Order	<input type="checkbox"/>	
			0173	Rc'vd	<input type="checkbox"/>	
			Blink IR Emitter	Rc'vd	<input type="checkbox"/>	
			\$9.25	\$18.95	Stock	<input type="checkbox"/>
		#		Delivered	<input type="checkbox"/>	

Master Project and CO/Product List Screen: Replicate the Proposal Product List screen

New screen layout has improved clarity and is the same a the Proposal Products screen.

Super & Sum Views		Product Phases		Master Project - Products - View										Client Mode													
Areas		Text		Products		Show All		John & Mary Smith																		Don	
Labor		Parts		Wire		Tasks		Orphans		Home Entertainment System 1284.1-1.100										Orphan = ■		Product Install Notes				Product \$63,	
																				Phantom = ■							
Zone - Area						View		Make		Model				Product Labor		Unit List		Unit Sell									
No		Exclude		Hide		Option		Discipline		Category		Type		Parts Labor		Unit Cost		GP%		Ext							
Discount Price		Price		Price		Product		Phase		Finish		"Like Kind" ?		Description		Updated				Ext D							
Show		Show		Show		Show		CO#		Unit		No Qty Sum		Comment		Wire Labor				Ext D							
1 - Home Theater										1 Linn		5101 Personal Handset :		148				390.00									
								Automation		Remote		Handheld Remote Control		750		234.00		40.0%									
								3 Final		Black		Universal learning remote :				8/8/2011											
										ea																	
1 - Home Theater										1 Linn		5125		80				2,750.00									
								Audio		Amplifier		Multi-channel		480		1,650.00		40.0%									
								3 Final		Silver		Five channel power				8/8/2011											
										ea																	
1 - Home Theater										1 Linn		Melodik		130				4,950.00									
								Audio		Speaker		Powered Subwoofer		95		2,970.00		40.0%									
								3 Final		Black		Aktive isobarik bass		319		8/8/2011											
								C		ea																	

Master Project and CO/Labor Supplement Screen: Replicate the Proposal Supplement screen

New screen layout has improved clarity and is the same as the Proposal Labor Supplement screen.

Primary Phase: 3 Final			Master Project - Product Detail - Labor Supp View						1 of 35 ?										
John & Mary Smith 1284.1-1.100											Done								
Linn : 5101 Personal Handset Automation : Remote : Handheld Remote Control											◀ Prev Next ▶								
Product		Specs		Pix - PDF's		Labor		Parts		Wire		Tasks		1 - Home Theater					
Phase 1 (Prewire)													Refresh						
Labor Type Phase 1 DOD: 0%		Cost		Sell		Unit Time hr:min:sec		Time Unit w/DOD		Ext w/DOD		Cost Unit w/DOD		Ext w/DOD		Sell Unit w/DOD		Ext w/DOD	
2 - Programming		\$40.00		\$80.00		0:00:00		0:00:00		0:00:00									
3 - Calibration		\$50.00		\$100.00		0:00:00		0:00:00		0:00:00									
5 - Wire Labor - Bulk		\$35.00		\$60.00		1:15:00		1:15:00		1:15:00		\$43.75		\$43.75		\$75.00		\$75.00	
(Phase 1 Prewire) Total:						1:15:00		1:15:00		1:15:00		\$43.75		\$43.75		\$75.00		\$75.00	
Phase 2 (Trim)																			
Labor Type Phase 2 DOD: 0%		Cost		Sell		Unit Time hr:min:sec		Time Unit w/DOD		Ext w/DOD		Cost Unit w/DOD		Ext w/DOD		Sell Unit w/DOD		Ext w/DOD	
2 - Programming		\$40.00		\$80.00		0:00:00		0:00:00		0:00:00									
3 - Calibration		\$50.00		\$100.00		0:00:00		0:00:00		0:00:00									
5 - Wire Labor - Bulk		\$35.00		\$60.00		0:00:00		0:00:00		0:00:00									
(Phase 2 Trim) Total:						0:00:00		0:00:00		0:00:00		\$0.00		\$0.00		\$0.00		\$0.00	
Phase 3 (Final)																			
Labor Type Phase 3 DOD: 0%		Cost		Sell		Unit Time hr:min:sec		Time Unit w/DOD		Ext w/DOD		Cqst Unit w/DOD		Ext w/DOD		Sell Unit w/DOD		Ext w/DOD	
2 - Programming		\$40.00		\$80.00		0:30:00		0:30:00		0:30:00		\$20.00		\$20.00		\$40.00		\$40.00	
3 - Calibration		\$50.00		\$100.00		0:20:00		0:20:00		0:20:00		\$16.67		\$16.67		\$33.33		\$33.33	
5 - Wire Labor - Bulk		\$35.00		\$60.00		0:00:00		0:00:00		0:00:00									
(Phase 3 Final) Total:						0:50:00		0:50:00		0:50:00		\$36.67		\$36.67		\$73.33		\$73.33	
Grand Total - All Phases (1+2+3)													Total Product Qty = 1 ea						
Labor Type		Cost		Sell				Time Unit w/DOD		Ext w/DOD		Cost Unit w/DOD		Ext w/DOD		Sell Unit w/DOD		Ext w/DOD	
2 - Programming		\$40.00		\$80.00		<input type="checkbox"/>		0:30:00		0:30:00		\$20.00		\$20.00		\$40.00		\$40.00	
3 - Calibration		\$50.00		\$100.00		<input type="checkbox"/>		0:20:00		0:20:00		\$16.67		\$16.67		\$33.33		\$33.33	
5 - Wire Labor - Bulk		\$35.00		\$60.00		<input type="checkbox"/>		1:15:00		1:15:00		\$43.75		\$43.75		\$75.00		\$75.00	
(Phase 1+2+3) Grand Total:								2:05:00		2:05:00		\$80.42		\$80.42		\$148.33		\$148.33	

Product Library/Product Detail/Pix: New Pix screen clarifies Linking vs Embedding pix into SCPS

Also you can copy the Product Name and the Primary Pix with buttons

Open Web Browser

DrivePath Utility

Product Library - Pix

1 of 452

Home

Search Web for Pix

AV IQ Website

Other Pix Views

Pix Utility

Crestron AADS-XM

Adagio Audio Distribution System w/ XM Sat Radio Radio Radio

Audio : Multi-room : Switcher

Done

Prev

Next

Product

Specs

Pix

PDF

Labor

Parts

Wire

Tasks

Copy Product Name >

Crestron_AADS-XM_Black

Copy Primary Pix >

Proposal Picture

Click on the Picture or the Paper Clip to Add Pix

X Indicates that the Pix is Linked, not Embedded >


It saves space to Insert Pix as a Reference,

than to Embed the Picture into the Product Library

Picture file extensions should be 3 characters

Not 4 characters ie: .jpg not .jpeg

Primary Picture



Make sure you check the Store Reference box, before you Insert the Picture

Insert Picture

Look in: SCPS_pix

File name: Akurate212_Rosenut.jpg

File type: All Files (*.*)

☒ Store only a reference to the file

POS/Quotation/Work Order/Service Order: New Completed Signature Option

You now have the option to Show a Completed Signature line on POS Quotations, Work Orders, Service Orders, as well as the normal Acceptance Signature.

This option can be enabled in Master Prefs/POS/Defaults

Master Prefs - POS Defaults
? Home

Defaults
Comments
Terms
Alternate
PS Ticket
Done

POS Options

Do Not Sort POS Lists screens ☐

Sort POS List screens by Descending Order

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

☐ Show Print Dialog when Printing all POS Invoices

☒ Show "Completed Signature" Line on Quotations, Work Orders, Service Orders

☐ Hide Labor Matrix Detail when Printing all POS Invoices

☐ Hide Quotation & Invoice GP% and Cost Total

Cutting Edge Systems Corp
364 Littleton Rd
Westford, MA 01886
978-392-1392



QUOTATION

QT #7197
12/8/2014

johncthibault@comcast.net

John Thibault
8 Zeus Dr
Chelmsford, MA 01824

John Thibault

Qty	Description	Price	Total
48 ea	TCP : TCP-LED12BR40D27K : Elite Series BR40 Replacement LED Lamp	32.34	1,552.32
48 ea	TCP : TCP-LED4E12B1127K : Elite Series 4-Watt Blunt-Tip Candelabra LED Lamp	19.01	912.48
1 ea	Control4 : C4-SW120277-xx : Wireless Switch (120V/277V) : TBD	140.00	140.00

Labor	Hours	Rate	Amount
Equipment Installation:	3:27:00	90.00	310.50
Total Labor:	3:27:00 Hrs		310.50

Line Items:	2,604.80
Labor:	310.50
Other:	
Subtotal:	2,915.30
Tax:	162.80
Freight:	
Total:	3,078.10

Other Charges	Amount

Total Other:

Prices in this quotation are good for 30 days.

Terms Quotation prices good for 30 days

Sales Rep Craig Heim

Payment Check

Ship VIA

Acceptance Signature: _____ Date: _____

Completed Signature: _____ Date: _____

Contact Library: Alpha Finder now Sorts Last Name and then Company name in the proper order

Find Contacts

Fav A

B

C

Contact Manager

All

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Clients

Vendors

Contractor

Users

Locations

Pick or Add a New Contact

398 of 7119 Contacts

New Contact

Cancel

Pick Contact	Name	Company	Category	Fav Phone	Info	View	Fav
	Raab, Ronald		Client	(H) (303)841-4122			<input type="checkbox"/>
	Raabe, Mr and Mrs	American West	Select a Category				<input type="checkbox"/>
	Rabun, Zach and Rachel						<input type="checkbox"/>
	Raderman, Josh		Employee				<input type="checkbox"/>
	Radiology Imaging Associates (FN)		Client	(H) (720)493-3590			<input type="checkbox"/>
	Radkiewicz, Ted			(H) 303-282-4653			<input type="checkbox"/>
	Rady, Katy			(H) 720-252-3119			<input type="checkbox"/>
	Rady, Paul			(H) 303-520-5178			<input type="checkbox"/>
	Rady, Paul and Katy			(H) 303-520-5178			<input type="checkbox"/>
	Rady, Paul and Katy			(H) 303-797-6926			<input type="checkbox"/>
	Rady, Paul and Katy						<input type="checkbox"/>
	Rady, Paul and Katy						<input type="checkbox"/>
	Raether, Pete			(H) 7203082163			<input type="checkbox"/>
	Rahill, Paul			(H) 719-328-9458			<input type="checkbox"/>
	Rainwater, Jason		Client	(H) (559)314-5941			<input type="checkbox"/>
	Rajabi, Abbas			(H) 303-770-2592			<input type="checkbox"/>

Find Contacts

Fav A

B

C

Contact Manager

All

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Clients

Vendors

Contractor

Users

Locations

Pick or Add a New Contact

398 of 7119 Contacts

New Contact

Cancel

Pick Contact	Name	Company	Category	Fav Phone	Info	View	Fav
	Raab, Ronald		Client	(H) (303)841-4122			<input type="checkbox"/>
	Raabe, Mr and Mrs	American West	Select a Category				<input type="checkbox"/>
	Rabun, Zach and Rachel						<input type="checkbox"/>
	Raderman, Josh		Employee				<input type="checkbox"/>
	Radiology Imaging Associates (FN)		Client	(H) (720)493-3590			<input type="checkbox"/>
	Radkiewicz, Ted			(H) 303-282-4653			<input type="checkbox"/>
	Rady, Katy			(H) 720-252-3119			<input type="checkbox"/>
	Rady, Paul			(H) 303-520-5178			<input type="checkbox"/>

Contact: Auto Delete Blank Contacts when Adding a new contact and not entering out Contact Info

If you add a new Contact and do not enter any Contact Info, you will get a message asking you to Add Info or Delete the Contact

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

Duplicate Contact Delete Contact Print - Export Menu Add Contact New Proposal New POS New Task Done Prev Next 5 of 215

Details Info Com Log No Entities Files & Pix Transactions

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

Fav Print Company Account ID Web Address Web

Contact Contact Title First Name Last Name Info Email Address Email

Message X

This Contact has no Info.
Do you want to add info or Delete this blank Contact?

Delete Add Info

Fav Address 1 Current Country Code

Contact: New Entity Icon

Contacts that have a Proposal, Project, Change Order or POS attached to them have a new colored Icon.

This number is now correct when adding CO's to a Project

Client Mode ☐

Master Project - Pricing - View

MP 1

Printer Setup

Print

?

Home

Ken Lipson

Done

Pricing

Labor Rates

Commissions

Tax Summary

Product Tax

Fees Tax

Integrated Electronic System
1965.2-1.1

Grand Total of Project with all Change Orders

Refresh

Excluded Products Totals

Show List Price & Discount ☒ yes ☐ no

Show Sales Tax ☒ yes ☐ no

	Original Project	All Finalized Change Orders	Master Project Sell with CO's	GP%	Cost	Profit	Discount
Product	\$31,203.86	-\$2,886.55	\$28,317.32	38.2%	\$17,497.84	\$10,819.48	-\$4,353.44
Installation	\$17,948.54	-\$1,700.00	\$16,248.54	59.7%	\$6,545.63	\$9,702.92	
Parts	\$662.18	\$0.00	\$662.18	45.3%	\$362.03	\$300.15	
Wire & Cable	\$2,193.77		\$2,193.77	57.4%	\$933.95	\$1,259.82	
Additional Fees	\$2,164.46		\$2,164.46	54.5%	\$984.57	\$1,179.89	
Total	\$54,172.82	-\$4,586.55	\$49,586.27	46.9%	\$24.01	\$23,262.26	-\$4,353.44
Total Tax	\$7,042.47	-\$596.25	\$6,446.22				
Grand Total	\$61,215.28	-\$5,182.80	\$56,032.49				

Master Project - Labor Summary

Refresh

Labor Meter

Labor Category	(h:m) Hours	(hourly) Rate	Phase 1 Prewire	Phase 2 Trim	Phase 3 Final	Total
1 - Installation	73:05	\$110.00	\$73.33	\$1,292.50	\$6,673.33	\$8,039.17
2 - Programming	18:00	\$150.00			\$2,700.00	\$2,700.00
3 - Prewire		\$85.00				
4 - Parts Labor	32:45	\$110.00	\$412.50	\$2,447.50	\$742.50	\$3,602.50
5 - Wire Labor - Bulk	18:52	\$85.00	\$1,604.38			\$1,604.38
6 - Wire Labor - Precut	2:45	\$110.00			\$302.50	\$302.50
Total Amount			\$2,090.21	\$3,740.00	\$10,418.33	\$16,248.54
(h:m) Total Hours			23:17	34:00	92:10	149:27

Fix Master Project/Pricing Totals: Fix Tax Total numbers, when CO's are added to a Project

Client Mode ☐

Master Project - Pricing - View

MP 0

Printer Setup

Print

?

Home

Ken Lipson

Done

Pricing

Labor Rates

Commissions

Tax Summary

Product Tax

Fees Tax

Integrated Electronic System

1965.2-1.1

Grand Total of Project with all Change Orders

Refresh

Excluded Products Totals

Show List Price & Discount ☒ yes ☐ no

Show Sales Tax ☒ yes ☐ no

	Original Project	All Finalized Change Orders	Master Project Sell with CO's	GP%	Cost	Profit	Discount
Product	\$31,203.86	-\$2,886.55	\$28,317.32	38.2%	\$17,497.84	\$10,819.48	-\$4,353.44
Installation	\$17,948.54	-\$1,700.00	\$16,248.54	59.7%	\$6,545.63	\$9,702.92	
Parts	\$662.18	\$0.00	\$662.18	45.3%	\$322.03	\$300.15	
Wire & Cable	\$2,193.77		\$2,193.77	57.4%	\$933.95	\$1,259.82	
Additional Fees	\$2,164.46		\$2,164.46	54.5%	\$984.57	\$1,179.89	
Total	\$54,172.82	-\$4,586.55	\$49,586.27		\$26,324.01	\$23,262.26	-\$4,353.44
Total Tax	\$7,042.47	-\$596.25	\$6,446.22				
Grand Total	\$61,215.28	-\$5,182.80	\$56,032.49				

Master Project - Labor Summary

Refresh

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1 - Installation	73:05	\$110.00	\$73.33	\$1,292.50	\$6,673.33	\$8,039.17
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6 - Wire Labor - Precut	2:45	\$110.00			\$302.50	\$302.50
Total Amount			\$2,090.21	\$3,740.00	\$10,418.33	\$16,248.54
(h:m) Total Hours	23:17		34:00	92:10	149:27	

Fix: Project CO List: After Deleted the last CO, you now can Add a new CO or go to the Project Detail screen

Instead of being kick out of the Project

<input type="button" value="Show All CO's"/> <input type="button" value="View Only Final CO's"/> <input type="button" value="View All Final CO - Totals"/>	<div>Project - All Change Orders</div> <div>Jennifer Altshuler</div> <div>Custom Integrated System 2825.1-1.101</div> <div> <input type="button" value="Show COs from All Projects"/> <input type="button" value="Add a Change Order to this Project"/> </div>	<input type="button" value="Print"/> <input type="button" value="Home"/> <div> <input type="button" value="This Project"/> <input type="button" value="All Projects"/> </div>
<div>View Type</div> <div>Dup Fav CO Status</div> <div> <input type="button" value="Pending"/> <input type="text" value="3/4/2018"/> <input type="text" value="2825.1c1-1.101"/> </div>	<div>Change Order Title</div> <div>CO Reference Info</div> <div> <input type="text" value="Custom Integrated System"/> <input type="text" value=""/> </div>	<div>CO Total</div> <div>Payments</div> <div>Balance Due</div> <div>Del</div> <div> <input type="text" value="\$0.00"/> <input type="text" value="\$0.00"/> <input type="button" value="Del"/> </div>

SCPS 13.3v3 Upgrade

New Features, Enhancements and Fixes

3-4-2018

Prod Library/Product Detail/Pix: Embed Pix Access Rights

Embedding Pix, takes up a lot of space and slows SCPS down. It is much more efficient to save Product Pictures in a folder on your computer

and Link the Pix to Products in the Product Library, For this reason we recommend Linking Pix, instead of Embedding them..

Checking this box enables this User to Embed Pix in the Product Library.(Not Recommended)

Open Web Browser		DrivePath Utility		Product Library - Pix				1 of 7846 ? Home	
Search Web for Pix AV IQ Website		Creston CNXHUB Cresnet Hub Accessories : Power Accessories : Electrical				Done			
Other Pix Views Pix Utility						Prev Next			
Product	Specs	Pix	PDF	Labor	Parts	Wire	Tasks		

Copy Product Name >

Creston_CNXHUB

Copy Primary Pix >

Primary Picture

Pictures are stored in the SCPS_pix folder and linked to this Product

Picture file extensions should be 3 characters not 4 ie: .jpg not .jpeg

Panel Pictures

Message

✕

Link your pictures (recommended)
 Save your Pix in the SCPS_pix folder. At the next Insert Picture window...Check the "Store only a Reference" box and select your Pix file.

Embed
 This option imports a Pix into the SCPS Product Library. It increases the size of the Product Library and slows down SCPS upgrading. Please use this option sparingly and do not allow your Product Library file to exceed 2 gig in size.

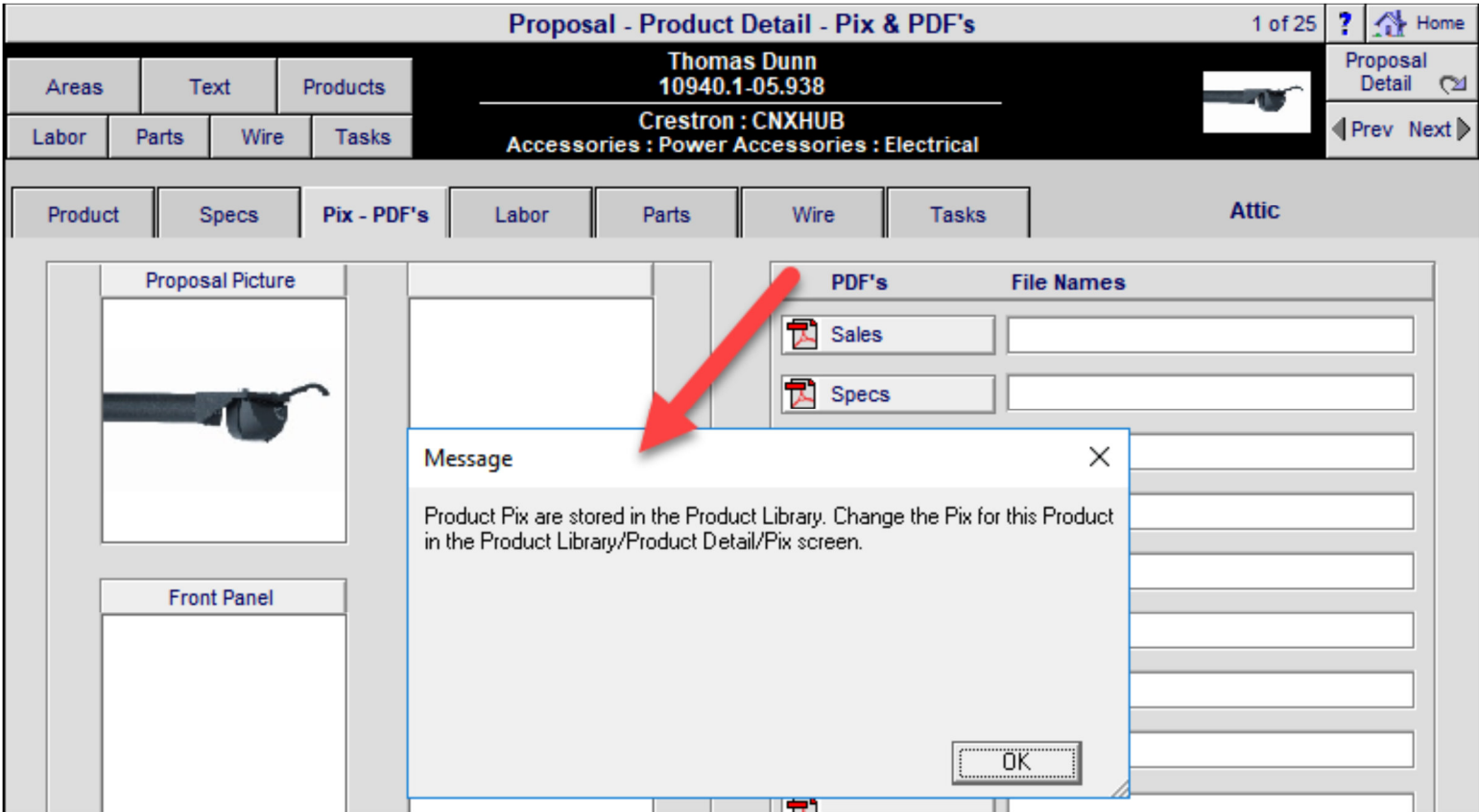
Cancel

Embed

Link

Proposal Area Portal No "Add Product" Prompt <input type="checkbox"/> ?		Proposal Product Portal Sort by Make Not Discipline <input type="checkbox"/>		Product Favorites User Assignable Not Global <input type="checkbox"/>		Check All User Access Rights UnCheck All		Sort Users Prev/Next ? Home	
Jim Engandela Horizon Software 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"/> Inventory Control Module <input checked="" type="checkbox"/> Module Utilities			Access Level <div style="border: 1px solid #ccc; padding: 5px; text-align: center; margin-bottom: 5px;">Administrator</div> <p>Administrators see all Proposals & Projects</p> <p>Managers see their Proposals & Projects and users that they manage</p>			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 &			
Product Library - Embed Pictures <input type="checkbox"/> Allow Embedding Pix Embedding Pix, takes up a lot of space and slows SCPS down. It is much more efficient to save Product Pictures in a folder on your computer and Link the Pix to Products in the Product Library, For this reason we recommend Linking Pix, instead of Embedding them.. Checking this box enables this User to Embed Pix in the Product Library.(Not Recommended)									

Proposal/Product Detail/Pix: Pop Message indicating that Pix are stored in the Product Library



Fix: Project/Pricing/Tax Summary: Remove Pause

File Edit View Insert Format Records Scripts Window Help

projRates

Records: 1454

Found: 1

Unsorted Script:

Continue

Cancel


Project - Tax Summary - View

Bo Kyler
HD-home
Treadwell - Shades
2827.1-1

Tax Summary	Sell	Tax A	Tax B
Equipment	\$10,456.68	\$435.63	\$0.00
Installation +	\$375.00	\$0.00	\$0.00
Misc. Parts	\$250.00	\$10.42	\$0.00
Wire & Cable			
Sub Total	\$11,081.68	\$446.04	\$0.00

Tax Rate	
Location	A Tax Rate + B Tax Rate
Hawaii Sales Tax	4.166%

Tax Status by Subtotal	
A Tax Rate	B Tax Rate
Products T Taxable	T Taxable



ProdUpdater: Change Tyler Path Switch to LU Folder or SCPS Folder

SCPS 13.3v2 Upgrade

New Features, Enhancements and Fixes

2-30-2018

Project/Labor Supplements: Add Labor Tax Override to the Project Labor screen, like the Proposal Labor screen.

All Suppliments		Project - Labor Supplements - View										Print	?	Home	
Areas		Text		Products		John & Mary Smith				Degree of Difficulty		Done			
Labor		Parts		Wire		Home Entertainment System				1 - Prewire 0%		Labor			
						1315.1-1.51				2 - Trim 0%		Details			
										3 - Final 0%					
All Areas		Labor Supplements										? Labor Total 11:30:00		\$710.00	
Labor assigned to		Zone-Area		Qty	Make - Model	Labor Type	Sort	CO	Tax A B	Install Phases	Ext Labor Time (h:m:s)	Hourly Rate	Ext Sell		
		Bathroom 4		4	Crestron : C2N-DB6_	Installation			E E	1,2	4:00:00	\$60	\$240.00		
		Bathroom 4		4	Crestron : C2N-DB6_	Programming			E E	3	2:00:00	\$80	\$160.00		
		Bathroom 4		4	Crestron : C2N-DB6_	Parts Labor			E E	2,3	2:00:00	\$50	\$100.00		
		Bathroom 4		4	Crestron : C2N-DB6_	Wire Labor - Bulk			E E	1	2:00:00	\$60	\$120.00		
		Bathroom 4		2	Crestron : CNXBMO	Installation			E E	2,3	1:30:00	\$60	\$90.00		

Proposal/Tax Summary: Enable Tax Status by Subtotal to be changed

Improve Layout

Proposal - Tax Summary & Rates

Refresh



Printer Setup



Print

Dwayne Aaron

Done

Pricing

Labor Rates

Commissions

Integrated Electronic System

10944.1-01.9998

Tax Summary

Product Tax

Fees Tax

Includes Both
Bulk & Pre-Cut Wire

Tax Summary

	Sell	Tax A		Tax B	Total Tax
Equipment	\$0.00		+	=	
Labor	\$100.00	\$10.00	+	\$0.00 =	\$10.00
Misc. Parts		\$0.00	+	\$0.00 =	\$0.00
Wire & Cable			+	=	
Project Services	\$210.00		+	=	
Sub Total	\$310.00	\$10.00	+	\$0.00 =	\$10.00

Tax Rate

Location	A Tax Rate		B Tax Rate	Total Tax Rate
Albuquerque	10.000%	+	5.000%	15.000%

Tax Status by Subtotal

	A Tax Rate	B Tax Rate
0 Products	E Exempt	E Exempt
Labor	T Taxable	T Taxable
Misc Parts	T Taxable	E Exempt
Bulk Wire & Cable	E Exempt	E Exempt
Pre-Cut Wire & Cable	E Exempt	E Exempt

Sales Tax - Print Options


Show Sales Tax ☒ Yes ☐ No

Contract Tax Totals Option

Include Sales Tax in the Grand Total
Do not show tax separately ☐ Yes ☐ No
blank = no

Proposal/Client: Proposal Tax Defaults

Herb Abbott

Done 

Client

Project

Integrated Electronic System

10945.1-01.9998

Info

Contacts

Com Log

Follow-Up
Letters

Client

Modify or Switch Contact 

First Name

Herb

Last Name

Abbott

Company

Proposal Name

Herb Abbott

Fav Format

First Name + Last Name

Address



6801 Sunshine Canyon

Cross Street

City

Boulder

State

CO

Zip

Country

County



Cross Street

City

State


Zip

Country

County

Email

eMail Address

lifelvr@mac.com 

Label

Herb Abbott

6801 Sunshine Canyon

Boulder, CO

(H) 303-704-5550

Global - Contact Notes

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

Numbers

Home Phone

303-704-5550

Ext

Work Phone

Ext

Fax 1

Select Tax

New Tax  Tax ☒ Yes ☐ No

Tax Region Breckenridge

Tax A

5.400%











Location ID

Tax B

Locate ID 9

Total Tax

5.400%

Pick	Tax Region	Zip Code	Tax A	Total
	Location ID	Locale ID	Tax B	Tax
	Albuquerque		7.500%	7.500%
	Breckenridge	80424 9	5.400%	5.400%
	Co,El paso, monument,	7	4.130% 0.000%	4.130%
	Colo, Colo Spgs, El Paso	3	8.250% 0.000%	8.250%
	Colo, El Paso Cty	6	5.130% 0.000%	5.130%
	Colo, RTD	4	4.000% 0.000%	4.000%
	Colo, RTD, Arvada	A	7.460% 0.000%	7.460%
	Colo, RTD, Bldr, Bldr City	2	8.845% 0.000%	8.845%
	Colo, RTD, Bldr Cty	5	4.985% 0.000%	4.985%
	Colo, RTD, Broomfield	B	8.150% 0.000%	8.150%

Tax Status by Subtotal

	A	B
	Tax Rate	Tax Rate
Products	T Taxable	T Taxable
Labor	T Taxable	T Taxable
Misc Parts	T Taxable	T Taxable
Bulk Wire & Cable	T Taxable	T Taxable
Pre-Cut Wire & Cable	T Taxable	T Taxable


Proposal/Project/Pricing/Product Tax: Improved data display

- Product Tax										Refresh	Printer Setup	?	Print	
Mike Bock										Change Supplement Taxes from the Supplement Screens				Done
Pricing	Labor	Commissions	Integrated Electronic System										Auto Set Product Tax Flags	Auto Set Labor Tax Flags
Tax Summary	Product Tax	Fees Tax	10934.1-01.728											
<u>Zone - Area</u>														
<u>Make</u>														
<u>Model</u>														
			Product Tax	Lab Tax Override	Labor Tax	Parts Tax	Bulk Wire Tax	Precut Wire Tax	Total Tax					
Home Theater	Tax A:	<input type="text" value="T"/>	36.72	T					36.72					
Audioquest	Tax B:	<input type="text" value="T"/>		T										
HDMCIN12.5A	Total:		36.72	<input type="text" value=""/>					36.72					
Home Theater	Tax A:	<input type="text" value="T"/>	38.73	T					38.73					
Audioquest	Tax B:	<input type="text" value="T"/>		T										
HDMICAR01	Total:		38.73	<input type="text" value=""/>					38.73					
Home Theater	Tax A:	<input type="text" value="T"/>	43.32	T	1.89				45.21					
Audioquest	Tax B:	<input type="text" value="T"/>		T										
MKENZIE01X	Total:		43.32	<input type="text" value=""/>	1.89				43.32					
Home Theater	Tax A:	<input type="text" value="T"/>	7.23	T	0.63				7.86					
Audioquest	Tax B:	<input type="text" value="T"/>		T										
MKENZIE01XS	Total:		7.23	<input type="text" value=""/>	0.63				7.23					
Home Theater	Tax A:	<input type="text" value="T"/>	3.29	T	5.68				8.97					
Chief	Tax B:	<input type="text" value="T"/>		T										
CMA105	Total:		3.29	<input type="text" value=""/>	5.68				3.29					
Home Theater	Tax A:	<input type="text" value="T"/>	3.44	T	5.68				9.12					
Chief	Tax B:	<input type="text" value="T"/>		T										
CMS018	Total:		3.44	<input type="text" value=""/>	5.68				3.44					
Home Theater	Tax A:	<input type="text" value="T"/>	18.82	T	5.68				24.50					
Chief	Tax B:	<input type="text" value="T"/>		T										
RPMA020	Total:		18.82	<input type="text" value=""/>	5.68				18.82					
Home Theater	Tax A:	<input type="text" value="T"/>	459.00	T	9.47			T 1.58	470.05					
McIntosh	Tax B:	<input type="text" value="T"/>		T				T						
MC8207	Total:		459.00	<input type="text" value=""/>	9.47			1.58	460.58					

Fix: Project/Edit Tax Summary: No Product, only Supplement - change default option

Tax Rate		
Location	A Tax Rate	B Tax Rate
Utah	6.350%	0.000%

FileMaker Pro


 This field cannot be modified until "zk.prop.p" is a valid value.

Tax Status by Subtotal		
	A Tax Rate	B Tax Rate
Products	T Taxable	T Taxable
Labor	T Taxable	E Exempt
Misc Parts	T Taxable	T Taxable
Bulk Wire & Cable	T Taxable	T Taxable
Pre-Cut Wire & Cable	T Taxable	T Taxable

Project Edit

Project - Tax Summary & Rates

Bo Kyler

HD-home

Treadwell - Shades

2827.1-1

Pricing

Labor Rates

Commissions

Tax Summary

Product Tax

Fees Tax

*Includes Both
Bulk & Pre-Cut Wire*

Tax Summary

	Sell	Tax A	
Equipment	\$10,456.68	\$435.63	+
Installation +	\$375.00	\$15.62	+
Misc. Parts	\$250.00	\$10.42	+
Wire & Cable			+
			+
Sub Total	\$11,081.68	\$461.66	+

Tax Rate

Location	A Tax Rate	
Hawaii Sales Tax	4.166%	+

Tax Status by Subtotal

	A Tax Rate	
1 Products	T Taxable	T Taxable
Labor	T Taxable	T Taxable
Misc Parts	T Taxable	T Taxable
Bulk Wire & Cable	T Taxable	T Taxable
Pre-Cut Wire & Cable	T Taxable	T Taxable

New Features, Enhancements and Fixes

1-29-2018

Logo Screen: Re-Arrange Buttons for better comprehension



SmartPartner SOFTWARE

High Definition Proposal & Project Management System

Master Tracker	Contacts	Proposals	Product Library	Project Manager
Info	Forms	Projects	Sets Library	CPS
Preferences	Follow-Up	Completed	Text Library	Utilities
GraphicsDraw	Letters - Forms	<u>Point of Sale</u>	Proposal Archive	User Login

Sunday
November 19, 2017

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



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Optional Logo Screen can be changed in Master Prefs

EME
audio & video

SmartPartner SOFTWARE

High Definition Proposal & Project Management System

Contacts

Info

Utilities

Preferences

Point of Sale

Product Library

Sets Library

Text Library

Forms

GraphicsDraw!

Letters - Forms

Follow-Up

Master Tracker

Project Manager

Proposals

Projects

Completed

Proposal Archive

CPS

User Login

Sunday
November 19, 2017

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

?

Help

HORIZON
SOFTWARE

Exit

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All Entity List screens: Move Fav field next to Entity

Find Proposals	Fav A	B	C	5 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: Jim Engandela - 100 - Level: Administrator Location: 1 - EME Audio & Video Systems</div>															New Proposal			Leave					
Administrator																		Sale Probability		Projects						
Manager																				Completed						
User																										
			Dup Fav Number		User	View	Client	Company	Proposal Title	Created	Total															
					1283.1-1.100		Callahan, Hayes		Home Theater System	9/12/2006	\$30,647															
					1282.1-1.100		Potter, Mike & Jessica		Security System	9/12/2006	\$60,553															
					1276.1-1.100		Jameson, John		Video System	9/12/2006	\$30,647															
					1273.1-1.100		Hawn, Dr.	Chippewa Valley Eye Clinic	Home Entertainment	9/12/2006	\$65,666															
					A 1267.1-1.100		Engandela, Jim	Horizon Software	Home Entertainment	9/11/2006	\$57,452															

Proposal/Areas & Products: Default Options for Product Prompt and Product Portal Sorting have been added.

Adding Areas Prompts you to "Add Products & Supplements".

Sort Area Portal by Make, not Discipline.

Turn this Prompt on/off for this Proposal

User Default can be set in Master Prefs/User/Access Rights.

Super Views			Auto Build			Delete All Areas			Proposal - Areas & Products										Client Mode		Grand Total		?		Home							
Areas			Text			Products			Hayes Callahan										Products		\$22,909.95		Done									
Labor			Parts			Wire			Tasks			Home Theater System										Labor		\$995.83								
												1283.1-1.100										Parts										
																						Wire		\$3,041.20								
																						Area Total		\$26,946.98								
																						Labor Time		15:20:00								
Location			Zone			Areas			Add Area			Multi Areas			No Prompt			Sort by Make			Zone 1 - Home Theater											
						Pick or Type Area															Products			Sets			Supplements					
Location			Zone			View			Sort			Nam			Dup			Set			Del			Unit Sell			Ext Sell			Del		
			1			Home Theater			m																							

Proposal Area Portal No "Add Product" Prompt <input checked="" type="checkbox"/> ?	Proposal Product Portal Sort by Make Not Discipline <input checked="" type="checkbox"/>	Product Favorites User Assignable Not Global <input checked="" type="checkbox"/>	Check All	User Access Rights	UnCheck All	Sort Users	Prev/Next	? Home
Jim Engandela President Checked boxes have Access Rights Unchecked boxes do not have Rights				PC Screen Size Computer ?		Done		
				Screen Magnification 100%		Commissions		
Module/Screen Access <input checked="" type="checkbox"/> Preferences <input checked="" type="checkbox"/> Project Manager <input checked="" type="checkbox"/> Inventory Control Module <input checked="" type="checkbox"/> Module Utilities <input checked="" type="checkbox"/> Proposal - Project - CO Admin Utility <input checked="" type="checkbox"/> Proposal - Project Commissions <input checked="" type="checkbox"/> Proposal Custom Print Layouts <input checked="" type="checkbox"/> CPS Custom Proposal System access			Access Level Administrator Administrators see all Proposals & Projects Managers see their Proposals & Projects and the users that they manage Users only see their Proposals & Projects Proposals - Projects - Completed Archives - Change Orders <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/> Duplicate			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 Convert Final CO to Pending Point of Sale <input checked="" type="checkbox"/>		

Proposal/Print Menu: Custom Print Cue Glabman - MHT & GTS

Glabman - MHT

Cover

Areas & Products - no area totals with unit cost

Contact

Glabman - GTS

Cover

Areas & Products - no area totals with unit cost

Product Summary - with Pix

Contact

Proposal/Print Menu: Increase Company Name Length in all Report Footers

Glabman Technology Solutions 2318 Newport Blvd. Costa Mesa, CA 92627
Ph: 714-545-5505 Fax: 714-545-5535 info@glabman.com www.glabman.com

Dec 6, 2017 3751.2-1.119 © 2017 Glabman Technology Soluti all rights reserved Page:2 Initials_____

Proposal/Print Menu: Summary Reports with Unit and Ext Total

Unit Price field now properly reflects the Unit Price on these reports

Home Entertainment System
1284.1-1.100

Proposals Costing Projects Purchasing

Main Proposal

Print All Sections

Proposal Sections

- Cover Page
- Client Intro Shop Info
- Overviews
- Areas & Products
 - No "Like Kind Qty Sums"
 - Product Unit & Ext Prices
 - No Product Prices or Area Totals
 - No Products or Text - Only Area Totals
 - No Products - Only Area Text & Totals
 - ☐ Hide Grand Total
- Product Summary
 - Show Grand Total
 - ☒ Hide Disciplines
 - Show Discipline Subtotals Show Grand Total
 - ☐ Hide Grand Total
 - ☐ Page Break by Discipline
- Fees & Services
- Contract
 - ☐ Show 2nd Address
 - ☐ Show Both Addresses
- Extra Text

Proposal Reports

Print All Sections

Products By

- | | | |
|------------|------|-------|
| Discipline | Area | Phase |
| | | |

Sub Totals By

- | | | |
|------------|------|-------|
| Discipline | Area | Phase |
| | | |

Grand Total By

- | | | |
|------------|------|-------|
| Discipline | Area | Phase |
| | | |

Product Summary
Unit & Ext Price

- Product Summary - Unit & Ext
 - ☒ Hide Disciplines
 - ☐ Page Break by Discipline
- Product Summary - Unit & Ext with Discipline Subtotals & GT
 - ☐ Hide Grand Total
 - ☐ Page Break by Discipline

Preliminary Contract

- Preliminary Contract with Options for:
 - Area Text & Totals, Disclaimer
 - Pricing Policy Price Expiry Date
 - No Payments or Terms

Proposal Supplements

Print All Sections

Supplements

- Labor Summary
 - Labor Detail List
 - Parts Summary
 - Parts Detail List
 - Wire & Cable Summary
 - Wire & Cable Detail List
 - Fees - Directed to Parts
 - Fees - Directed to Labor
- Master Proposal & Supplements**
- Discipline
 - Area
 - Products & Only Labor
 - Products & Supplements without Prices
 - Area by Phase
 - Phase

Product Summary

	<u>Unit Price</u>	<u>Ext Price</u>
3 ea APPLE : APPLE TV : Apple TV	\$69.00	\$207.00
1 ea ATLONA : AT-UHD-EX-70C-RX	\$212.49	\$212.49
1 ea ATLONA : AT-UHD-EX-70C-RX : 4x1 hdmi switcher	\$212.49	\$212.49
1 ea ATLONA : AT-UHD-PRO3-88M : 4k/uhd 8x8 poe matrix switcher	\$5,949.99	\$5,949.99
2 ea B&W : AM1 BLACK : Architectural Monitor	\$300.00	\$1,620.00
12 ea B&W : BBC6C : Back Box Com6 Series	\$100.00	\$1,200.00
6 ea B&W : CCM632 : Round In Ceiling Speaker : White	\$212.50	\$1,275.00
2 ea B&W : CCM664 : 6" In Ceiling Speaker	\$275.00	\$2,887.50
2 ea B&W : CCM7.4 : In Ceiling Theater Speaker	\$850.00	\$1,700.00
2 ea B&W : CWM663 : 6" in wall speaker	\$318.75	\$637.50
7 ea B&W : CWM664 : 6"IN WALL SPEAKER	\$233.75	\$1,636.25
1 ea B&W : ISW-4 : In wall subwoofer	\$680.00	\$680.00
1 ea B&W : ISW-4BB : Back box-isw4 inwall sub	\$170.00	\$170.00
2 ea B&W : PMK7C : Pmk For Com7.x	\$29.75	\$59.50
2 ea B&W : PMK06 : CCM65 BRACKET	\$21.25	\$42.50
2 ea B&W : PMKW6 : Cwm650 Bracket	\$27.50	\$171.88
1 ea B&W : SA250 MK2 : Rack Mount Amplifier	\$850.00	\$850.00
1 ea CHIEF MFG : LSM1U : Static Wall Mt	\$174.25	\$174.25
2 ea CHIEF MFG : LSTU : Large fixed wall mount	\$130.90	\$261.80
1 ea CHIEF MFG : TS318TU : 32-52in Thin Cantilever	\$317.90	\$317.90
1 ea CHIEF MFG : TS325TU : Swing Arm 25" Extension	\$427.00	\$427.00
1 ea CISCO : SG200-26P : 24PT GB POE SMRT SWTCH	\$416.50	\$416.50
1 ea FURMAN SOUND : F1500 UPS : Rack Mount Ups	\$1,104.96	\$1,104.96
1 ea GOLDEN EAR TECHNOLOG : 3D ARRAY X : 3 channel soundbar	\$849.99	\$849.99
1 ea GOLDEN EAR TECHNOLOG : SUPERSAT 60C : On Wall/shlef Center Channel	\$695.00	\$695.00
1 ea HOLOVISION : 413-VIO (SIP) IP-ORB : Oil Rubbed Bronze	\$2,567.00	\$2,567.00
1 ea HOLOVISION : 702-S12-VIO(SIP)/VIK-IP-BC : Gate Intercom Controller With Vio/Viking Intercoms & 2.1 Mp Cam	\$3,857.00	\$3,857.00
1 ea LG ELECTRONICS : OLED65B6P/EW : OLED UHD TV	\$2,999.00	\$2,999.00
1 ea LISTENUP INSTALL : CLIENT ALARM SYSTEM		

ListenUp Inc. - Albuquerque 6916 Montgomery Blvd. NE Albuquerque, NM 87109-1421
Ph: (303) 744-9411 Fax: (303) 744-2888 smills@listenup.com www.listenup.com
Dec 12, 2017 9939.1-81.862 © 2017 ListenUp Inc. - Albuquerque all rights reserved Page:1 Initials_____

Project/Final Change Order: Fees Posting

When converting a CO from Pending to Final all Fees are Posted so that they can be used in Master Project Fees totals.

Product Library: Improve Sort capability on all List screens

Product Library/Pick Product/Product Detail: Return to Pick Product list screen when leaving Product Detail

When viewing a Products Detail and clicking on the Done button you now return to the Product List screen you came from.

Find Products										Fav A										B	C	Show Hidden										Product Library - Pick Products										Show 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Product Library/Product Detail/Pix: New Picture Utility for Resizing Pix

Find Products

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Show Hidden

Product Library - Line List

Show Makes

Groups

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Show Products

Hidden Products

Utilities

Part

Phantom


All Supplements

Bulk

PreCut

Discontinued Products

Utility Lists



EME

audio & video

56 Items

58 Total

Phan

Part

Lab

Wire

New Product

Detail List

Inventory Control

Leave

Product Sets

Print Menu

By Make

Show All Groups

Q Displin

Cat

Type

Class View

Make

Model : SKU

Description


Finish

Price



Cue

Auto Tag

Audio	Speak	Center Channel			Klipsch	Klimax Chakra 500	Center Channel	Black	399.00 ea				
Audio	Speak	Floor			Klipsch	RF-35 (6483)	Reference Tower	Black	499.00 ea				
Audio	Multi	Keypad			Linn	5101 Personal Handset	Universal learning	Black	390.00 ea				
Audio	Ampli	Surround Process			Linn	5103 System Controller	Linn 5103 inc DTS, no		5,500.00 ea				
Audio	Speak	On-Wall			Linn	5110-W	Pair of on-wall	White	325.00 ea				

Find Products		Fav A		B	C	Show Hidden		Product - Utility Lists - Prices										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		All Supps		Show All		Replace Data		Sort By Dates												56 of 58		Done			
Part		Phantom		Discontinued																				Assign Groups to Many Products			
Bulk		PreCut		Prices		Value Lists		Entities		Groom Descriptions		Groom Pictures															
All Product Groups																								Discontinued		Tag All	
Dept		Cat		Type		View		Class		Make		Model		Description		Discount		Finish		Fav Hide							
Audio		Speak		Center Channel				Product		Klipsch		Klimax Chakra 500 Twin-Neutrik		Center Channel Speaker		Black Ash				A		B					
		Product Created: 1/28/2005		Unit		ea		List		\$399.00		Adjustment Type		%		\$0.00		List		\$399.00		Loaded Prices					
		Sell Price Updated: 6/2/2011		Sell		\$399.00												Sell		\$399.00		47.4% GP					
		Cost Price Updated: 6/2/2011		Minimum Sell				Min GP		%		\$						Cost		\$210.00							
				Cost		\$210.00																					
Audio		Speak		Floor				Product		Klipsch		RF-35 (6483)		Reference Tower Speaker		Black Ash				A		B					
								List		\$400.00		Adjustment Type		%		\$0.00		List		\$400.00		Loaded Prices					

XXXX

Open Web Browser		DrivePath Utility		Product Library - Pix										1 of 56		?		Home	
Search Web for Pix		AV IQ Website		Klipsch RC-35												Done			
Other Pix Views		Pix Utility		Center Channel Speaker												Prev		Next	
				Audio : Speaker : Center Channel															
Product		Specs		Pix		PDF		Labor		Parts		Wire		Tasks					
Copy Product Name >		Klipsch_RC-35_BlackAsh																	
		Proposal Picture																	
Copy Primary Pix >		Primary Picture																	
				<p>Pictures are stored in the SCPS_pix folder and linked to this Product</p> <p>Picture file extensions should be 3 characters not 4 ie: .jpg not .jpeg</p>															

Product Library - Pix & PDF Conversion Screen			? Home
<div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> Pix Utility List </div>	<div style="font-size: 1.2em; font-weight: bold;">Klipsch</div> <div style="font-size: 1.1em; font-weight: bold;">RC-35</div> <div style="font-weight: bold;">Center Channel Speaker</div> <div style="font-weight: bold;">Audio : Speaker : Center Channel</div>	1 of 56 <div style="text-align: center;"> <div style="display: inline-block; width: 10px; height: 10px; border: 1px solid black; margin: 0 5px;"></div> <div style="display: inline-block; width: 10px; height: 10px; border: 1px solid black; margin: 0 5px;"></div> <div style="display: inline-block; width: 10px; height: 10px; border: 1px solid black; margin: 0 5px;"></div> <div style="display: inline-block; width: 10px; height: 10px; border: 1px solid black; margin: 0 5px;"></div> </div> <div style="display: flex; justify-content: space-between; width: 100%;"> Prev Next </div>	<div style="margin-bottom: 5px;"> Done </div>
<div style="border: 1px solid black; padding: 2px;"> Copy Product Name > Klipsch_RC-35_BlackAsh </div>			
<div style="display: flex; justify-content: space-between;"> <div style="width: 15%;"> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px; text-align: center;"> Show All Products with Pix </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px; text-align: center;"> Clear These Pix </div> <div style="border: 1px solid black; padding: 5px; text-align: center;"> Clear All Pix on All Products </div> </div> <div style="width: 70%;"> <div style="text-align: center; font-weight: bold; margin-bottom: 10px;">Convert Pix from the Old Storage Method</div> <ol style="list-style-type: none"> 1. Create a SCPS_pix folder and place it in your Horizon folder. 2. Click on the Copy icon and Paste the image into a graphics program like Photoshop. 3. Save the picture from that graphics program into the SCPS_pix folder and name it with the Make & Model 4. Click on the Clear icons to delete the pictures and then use the Specs screen to re-link the images to SCPS. 5. You can also Clear All Pix on All Products if you like. <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="text-align: center;"> <div style="border: 1px solid black; padding: 2px; font-size: 0.8em;"> Proposal Picture </div> </div> <div style="text-align: center;"> <div style="border: 1px solid black; padding: 2px; font-size: 0.8em;"> Front Panel </div> </div> <div style="text-align: center;"> <div style="border: 1px solid black; padding: 2px; font-size: 0.8em;"> Back Panel </div> </div> </div> <div style="text-align: center; font-weight: bold; margin-top: 10px;">Additional Product Pictures</div> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="text-align: center;"> <div style="border: 1px solid black; padding: 2px; font-size: 0.8em;"> <div style="border: 1px solid black; width: 100px; height: 15px; margin: 0 auto;"></div> </div> <div style="border: 1px solid black; width: 100px; height: 100px; margin-top: 5px;"></div> </div> <div style="text-align: center;"> <div style="border: 1px solid black; padding: 2px; font-size: 0.8em;"> <div style="border: 1px solid black; width: 100px; height: 15px; margin: 0 auto;"></div> </div> <div style="border: 1px solid black; width: 100px; height: 100px; margin-top: 5px;"></div> </div> <div style="text-align: center;"> <div style="border: 1px solid black; padding: 2px; font-size: 0.8em;"> <div style="border: 1px solid black; width: 100px; height: 15px; margin: 0 auto;"></div> </div> <div style="border: 1px solid black; width: 100px; height: 100px; margin-top: 5px;"></div> </div> </div> </div> <div style="width: 15%; padding-left: 10px; vertical-align: top;"> <div style="text-align: center; font-weight: bold; margin-bottom: 10px;">Caution!!</div> <p style="text-align: center;">Do not paste pictures into these fields.</p> <p style="text-align: center;">Use the Spec's screen to add pictures.</p> </div> </div>			

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Product - Pix Utility List

Find Products Fav A B C ☐ Show Hidden ☐ Show Makes ☒ Groups ☐ ? Home

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

Show Products Hidden 2 of 58 Done

Part Phantom All Supps Show All Products with Pix Clear All Pix on All Products Clear All Pix on All Hidden Prods ? View Pix Help Guide Download GIMIP App

Bulk PreCut Discontinued

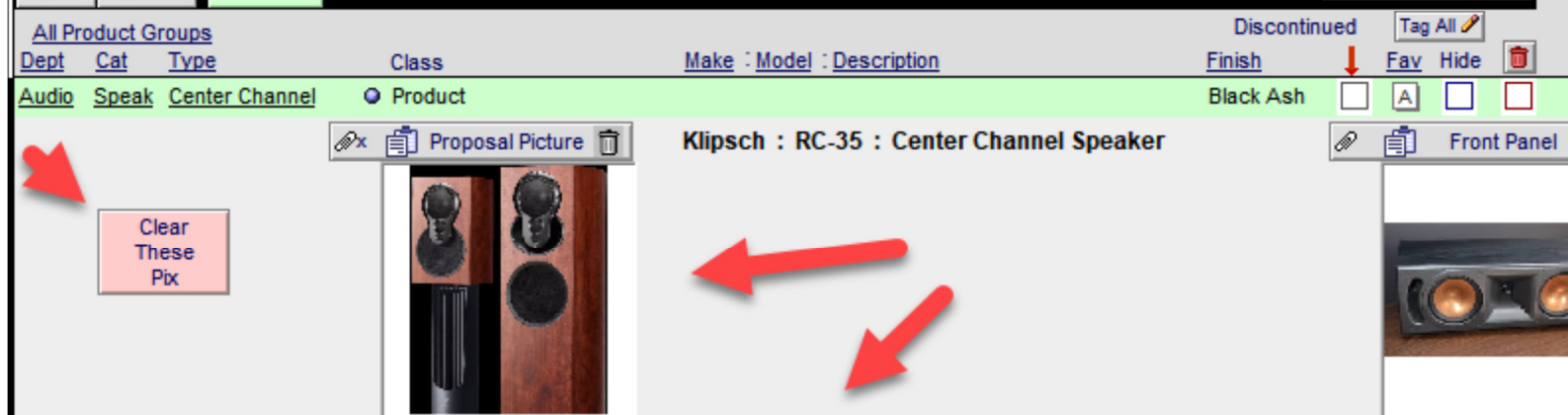
All Product Groups

Dept Cat Type Class Make : Model : Description Discontinued Tag All

Audio Speak Center Channel Product Black Ash Fav Hide

Klipsch : RC-35 : Center Channel Speaker Front Panel

Clear These Pix



		Find Products			Fav A		B	C			Product Library - POS Pick Products														Show Makes											
		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				Recent Products		Pick or Add a New Product																Phan Lab				Part Wire		Cancel		
		Part Phantom				All Supplements				POS Products																14 Items		6,894 Total				New Product				
		Bulk PreCut				Discontinued Products																														
		Show All Groups				Show by Make		Cue		Pick		View		Make		Model : SKU		Description		Finish				Sell Price				Hide Fav								
		Comme Comm		Comm		Miscellaneous				Atlas		AD-12BE		Surface Mt		12.95 ea																				
		Comme Comm		Comm		Miscellaneous				Atlas		AD14BE		Extension		20.95 ea																				
		Comme Comm		Comm		Miscellaneous				Atlas		AT100		100W 1Gang		25.50 ea																				
		Comme Comm		Comm		Miscellaneous				Atlas		AT100D		100W		32.95 ea																				
		Comme Comm		Comm		Miscellaneous				Atlas		AT100RM		Rack Mt 100W		29.95 ea																				
		Comme Comm		Comm		Miscellaneous				Atlas		AT35-RM		Rack Mt 35W		21.50 ea																				
		Comme Comm		Comm		Miscellaneous				Atlas		AT35D		VOL-CTRL		25.99 ea																				
		Comme Comm		Comm		Miscellaneous				Atlas		ATPLATE-052		RackMt 6Hole		27.95 ea																				
		Comme Comm		Microphone		DMS10E				Atlas		DMS10E		Ebony Drum		55.99 ea																				
		Comme Comm		Comm		Miscellaneous				Atlas		DS7E		8-13"Desktop		50.00 ea																				
		Comme Comm		70v Amplifier		FAP82T				Atlas		FAP82T		8"Coax		140.00 ea																				
		Comme Comm		Microphone		GN-13E				Atlas		GN-13E		13IN Flexible		11.99 ea																				
		Comme Comm		70v Amplifier		PA1001G				Atlas		PA1001G		1Channel		424.99 ea																				
		Comme Comm		Comm		Miscellaneous				Atlas		PA702-W		Pole Mt Amp		332.95 ea																				

Find Products		Fav A		B	C	<input checked="" type="checkbox"/> Show Hidden		Product Library - Quick View List														Show Makes		<input checked="" type="checkbox"/> Groups																													
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		<div></div>																												Phan Lab		Part Wire		Done																	
Part Phantom		All Supplements																														Recent Products		14 Items		6,894 Total																	
Bulk PreCut		Discontinued Products																																																			
Show All Groups		<input checked="" type="checkbox"/> Show by Make		Cue Notes		Make		Model : SKU		Description		Finish		Cue Notes		<input type="checkbox"/> Sell Price		<input type="checkbox"/> <Installed		<input type="checkbox"/> Hide Fav																																	
Comme Comm		Comm Miscellaneous		Atlas		AD-12BE		Surface Mt								12.95 ea		<input type="checkbox"/>		<input type="checkbox"/>																																	
Comme Comm		Comm Miscellaneous		Atlas		AD14BE		Extension								20.95 ea		<input type="checkbox"/>		<input type="checkbox"/>																																	
Comme Comm		Comm Miscellaneous		Atlas		AT100		100W 1Gang								25.50 ea		<input type="checkbox"/>		<input type="checkbox"/>																																	
Comme Comm		Comm Miscellaneous		Atlas		AT100D		100W								32.95 ea		<input type="checkbox"/>		<input type="checkbox"/>																																	
Comme Comm		Comm Miscellaneous		Atlas		AT100RM		Rack Mt 100W								29.95 ea		<input type="checkbox"/>		<input type="checkbox"/>																																	
Comme Comm		Comm Miscellaneous		Atlas		AT35-RM		Rack Mt 35W								21.50 ea		<input type="checkbox"/>		<input type="checkbox"/>																																	
Comme Comm		Comm Miscellaneous		Atlas		AT35D		VOL-CTRL								25.99 ea		<input type="checkbox"/>		<input type="checkbox"/>																																	
Comme Comm		Comm Miscellaneous		Atlas		ATPLATE-052		RackMt 6Hole								27.95 ea		<input type="checkbox"/>		<input type="checkbox"/>																																	
Comme Comm		Microphone		Atlas		DMS10E		Ebony Drum								55.99 ea		<input type="checkbox"/>		<input type="checkbox"/>																																	
Comme Comm		Comm Miscellaneous		Atlas		DS7E		8-13"Desktop								50.00 ea		<input type="checkbox"/>		<input type="checkbox"/>																																	
Comme Comm		70v Amplifier		Atlas		FAP82T		8"Coax								140.00 ea		<input type="checkbox"/>		<input type="checkbox"/>																																	
Comme Comm		Microphone		Atlas		GN-13E		13IN Flexible								11.99 ea		<input type="checkbox"/>		<input type="checkbox"/>																																	
Comme Comm		70v Amplifier		Atlas		PA1001G		1Channel								424.99 ea		<input type="checkbox"/>		<input type="checkbox"/>																																	
Comme Comm		Comm Miscellaneous		Atlas		PA702-W		Pole Mt Amp								332.95 ea		<input type="checkbox"/>		<input type="checkbox"/>																																	

Product Library: Find Products Exact Match improvement

The Alpha Finder now will only Find Product Makes with exactly the Make Name and not include Makes with similar names.

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		<div>EME audio & video</div>										Phan		Part		New Product		Leave				
Part		Phantom		All Suppliments												Lab		Wire		Product Sets						
Bulk		PreCut		Discontinued Products												Utility Lists		Detail List		Inventory Control		Print Menu				
By Make		Show All Groups												19 Items		6,894 Total		Detail List		Inventory Control		Print Menu				
Displin		Cat		Type		Class View		Make		Model : SKU		Description		Finish		Sell Price		Cue		Auto Tag						
Equip								AKG AAA		reter						ea										
Audio		Perso		Headphones				AKG		K550MKIIBLK		Over-Ear				199.95 ea										
Audio		Perso		Headphones				AKG		K845BTBLK		Over-Ear				299.95 ea										
Audio		Perso		Headphones				AKG		K845BTWHT		Over-Ear				299.95 ea										
Audio		Perso		Headphones				AKG		N60NC		On-Ear Noise				119.95 ea										
Audio		Perso		Headphones				AKG		N60NCBT		ON-EAR				239.95 ea										
Comme		Comm		Comm Miscellaneo				AKG		PT4500BD1		Pocket Transmitter		P.O.		439.00 ea										
Audio		Perso		Headphones				AKG		Y45BT-BLK		On-Ear				149.95 ea										
Audio		Perso		Headphones				AKG		Y45BT-WHT		On-Ear				149.95 ea										
Audio		Perso		Headphones				AKG		Y50-BLK		On-Ear				99.95 ea										
Audio		Perso		Headphones				AKG		Y50-RED		On-Ear				99.95 ea										
Audio		Perso		Headphones				AKG		Y50-TEA		On-Ear				99.95 ea										
Audio		Perso		Headphones				AKG		Y50BT-BLK		On-Ear				149.95 ea										
Audio		Perso		Headphones				AKG		Y50BT-BLU		On-Ear Bluetooth-Blue				149.95 ea										
Audio		Perso		Headphones				AKG		Y50BT-SLV		On-Ear				149.95 ea										
Audio		Perso		Headphones				AKG		Y55-BLK		On-Ear				129.95 ea										
Audio		Perso		Headphones				AKG		Y55-BLU		On				129.95 ea										
Audio		Perso		Headphones				AKG		Y55-RED		On-Ear				129.95 ea										
Audio		Perso		Headphones				AKG		Y55-WHT		On-Ear				129.95 ea										

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		<div>EME</div> <div>audio & video</div>										Phan		Part		New Product		Leave							
Part		All Supplements		Utility Lists												Lab		Wire		Detail List		Inventory Control		Product Sets					
Bulk		Discontinued Products																						Print Menu					
Show All Groups		Show by Make		Cue		Notes View Make		Model : SKU		Description		Finish		Sell Price		Auto Tag													
Q	C	Displn	Cat	Type																									
Video	Video	Blu Ray Disk player		Samsung	DVDHD931	DVI OUTPUT	299.00 ea																						
Comme	Comm	Comm Flat Panel		Samsung	HG32NB673BF	32" Hospital Led	449.00 ea																						
Comme	Comm	Comm Flat Panel		Samsung	HG32NE477SF-EW	"32"" Hospital	359.00 ea																						
Comme	Comm	Comm Flat Panel		Samsung	HG50NE690	50" Hospitality	699.00 ea																						
Comme	Comm	Commercial Tv		Samsung	PM49F	Commercial	1,599.99 ea																						
Video	Video	4k LCD TV > 60"		Samsung	QN55Q8CAMFXZA	Curved QLED	2,299.99 ea																						
Video	Speci	Do Not Use		Samsung	QN65Q7F	65" QLED UHD	2,199.99 ea																						
Video	Video	TV Custom		Samsung	QN75Q7F	QLED UHD TV	3,499.99 ea																						
Video	Video	TV Custom		Samsung	QN75Q8CAMFXZA	Curved UHD	4,799.99 ea																						
Video	Video	Vd. Miscellaneous		Samsung	SEK3500U	One Connect	399.99 ea																						
Video	Video	Blu Ray Disk player		Samsung	UBD-K8500	4K BluRay	269.99 ea																						
Video	Video	Blu Ray Disk player		Samsung	UBDM8500	4K/UHD Bluray	229.99 ea																						
Video	Video	Blu Ray Disk player		Samsung	UBDM9500	UHD Bluray	299.99 ea																						
Video	Video	1080p LCD TV <= 31"		Samsung	UN19D4003	720p 60Hz LED	99.00 ea																						
Video	Video	1080p LCD TV <= 31"		Samsung	UN19F4000	720p 60Hz LED	139.99 ea																						
Video	Video	1080p LCD TV <= 31"		Samsung	UN22D5003	1080p 60Hz	100.00 ea																						
Video	Video	1080p LCD TV <= 31"		Samsung	UN24H4000	720p LED TV	135.99 ea																						
Video	Video	1080p LCD TV <= 31"		Samsung	UN28H4000	720p 60Hz LED	189.99 ea																						
Video	Video	1080p LCD TV <= 31"		Samsung	UN28H4500	720p 60Hz	167.99 ea																						
Video	Video	1080p LCD TV <= 31"		Samsung	UN28M4500	Smart LED TV	199.99 ea																						
Video	Video	1080p LCD TV 32" - 49"		Samsung	UN32J4000	720p LED 32"	169.99 ea																						
Video	Video	1080p LCD TV 32" - 49"		Samsung	UN32M5300	1080p 32IN	229.99 ea																						
Video	Video	1080p LCD TV 32" - 49"		Samsung	UN40H5003	1080p LED TV	319.99 ea																						
Video	Video	1080p LCD TV 32" - 49"		Samsung	UN40J5200	1080P SMART	399.99 ea																						

Product Library/Alpha Finder: Remove wild card characters from Groups like = and <> for better searches

You can now add wild card character to Product Group Types like LCD Monitors => 40" without confusing the Alpha Finder search.

Product Library: Replace Data Access Rights

The Replace Data utility button has been moved to the Options section of the Product Detail screen.

Access Rights to this utility have been added to the Master Preferences/Other/Product 1 screen.

A Cancel option has been added to the 1st pop up menu when using this utility.

Find Products

Product Library - Product Detail

1 of 7757

Home

Update Supplements

Delete Product

Created: 8/23/2004

Sell Updated: 11/16/2016

Cost Updated: 11/16/2016

Creston

CNXHUB

Cresnet Hub

Accessories : Power Accessories : Electrical

New Product

Duplicate Product

Done

Prev

Next

Product

Specs

Pix

PDF

Labor

Parts

Wire

Tasks

Make

Creston

Model

CNXHUB

SKU

Finish

Sell Price

\$1,500.00 ea

Description

Cresnet Hub

Message

Replacing data in your Product Library cannot be undone. As a precaution, you can save a copy of your Product Library to your Desktop. This copy can be used to restore you Product Data if necessary.

Cancel

No Bkup

Yes Bkup

Group

Accessories : Power Accessories : Electrical

Class

Product

Phase

2 Trim

Status

Favorite

Tax A

T

Phantom Product

Tax B

QB Fee SKU

This Product is Not in a Proposal/Project

Options

Product Library

New Item

Discontinued Item

Hide this Item

Do not Hide

Do not Delete

Replace Data

Proposal Products

Area Sort Order

Do not Discount

Hide Printed Price

Issue Staple Up Card

Do not Purchase or Install

Proposal Labor Tax Override

◀ Prev Next ▶

.....
Yes Bkup

Proposal Labor Tax Override ☐



Letters - Forms: The Letter Library can now create Forms



SmartPartner SOFTWARE

High Definition Proposal & Project Management System

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

Sunday
November 19, 2017

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



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Add New Form button and Form Indicator

Find Letter/Form	Fav A	B	C	Letter/Form Library - List View																			Utilities	?	Home			
All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z		
17 Letters																												
<u>Form</u>	<u>View</u>	<u>Date</u>	<u>Title</u>											<u>Contact</u>	<u>Text</u>											<u>Sender</u>	<u>Fav</u>	
X		11/19/2017	Install Form												INSTALLATION SERVICES AND													
		11/19/2017	BERGMANS BUILDER												This design looks very adaptable for													

Add Duplicate Forms, Preview Form and Form Reference field

Delete	Duplicate	Letter Library - Form Detail		Preview - Print	?	Home
◀ Prev/Next ▶		+ New Letter	+ New Form	Done		

Date 11/19/2017	Title Install Form	Form X	
Fav <input type="checkbox"/>	Contact	Form Reference	Proposasi 276518
Sender			

Form Text

ABC

✓

INSTALLATION SERVICES AND RESPONSIBILITIES

- * Supervise all phases of the installation
- * Provide design assistance for cabinetry to house A/V equipment.
- * Review blueprints of equipment cabinetry, for dimensions, ventilation and wire management.
- * Coordinate work performed by other trades, such as electrical requirements, carpentry. etc.
- * Provide in-home training of system operation upon completion.

LABOR WILL INCLUDE

- * Pre-wiring of all speaker, volume and remote control and equipment location by electrician.
- * Installation of all in-wall speakers and controls.
- * Installation of all listed equipment.
- * Programming of TV and radio stations and remote controls as required.
- * Testing of all system functions.

MATERIALS WILL INCLUDE

- * Trim plates for all in-wall controls.
- * Audio & video interconnect cables an FM antenna.
- * Antenna/cable distribution network only if specified.
- * Meetings with architects, designers and contractors are subject to consultation charges.

SERVICE AND WARRANTIES

Manufacturer warranties for all new components will be in effect form completion, system failures due to any cause other than abuse, damage, or acts of God will be repaired at no charge for thirty days from that date of completion. If required, in-home service calls to troubleshoot, remove and reinstall defective components will be available at out customary rates after thirty days from completion.

Accept System Service Agreement _____ client initials _____ rep initials
I accept the system service option. ListenUp will trouble shoot, diagnose, and correct any system defects for no additional charge, except those caused by operator error. Defective components will be located, removed, repaired, and reinstalled at no additional cost, including pickup and delivery.

5yr Service Agreement Fee: _____

Decline System Service Agreement _____ client initials _____ rep initials
I decline the system service agreement. I acknowledge that the only warranties applicable to this purchase are those provided by the equipment manufacturers, and that such warranties, unless otherwise stated in writing, only cover the repair of equipment delivered by the purchaser to an authorized repair center. System diagnosis, removal, reinstallation, pickup, delivery, training, and operator error are excluded from coverage and, when provided, they will incur extra charges at the prevailing labor and material rates.

Print Form

11/19/2017

Reference

Proposal# 276518



1

INSTALLATION SERVICES AND RESPONSIBILITIES

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EME Audio & Video Systems
2950 Mall Drive Eau Claire, WI 54701
Phone: 715-287-3335 eMail: horizon@triwest.net

