Allpro Technology

2425 S. Blodgett Rd., Lake City, MI 49651
Phone: (231) 839-7928   Fax: (720) 293-7615
Email: support@allprotechnology.com
Website: www.allproinsulationsoftware.com

Allpro Insulator Upgrade Details Report

Version 10.1.0 – Release Date: 04/27/2015

Primary Enhancements

NOTE: In Version 9 we introduced our Multi-Day Splits Optional Module. For Version 10, this optional module has been renamed to our Advanced Features Module. Several additional high level features have been added to this optional module for Version 10. Note that if you previously purchased the Multi-Day Splits Optional Module, you will automatically receive the new Advanced Features Module free of charge when you purchase Version 10.

1. A HUGE FOCUS for the Version 10 upgrade was to **increase the user's productivity**. We have made several enhancements throughout Allpro Insulator that simplify common tasks. These range from reducing keystrokes for common tasks to adding shortcut menus to almost all grids. We have also made it much easier to access related data on other forms via quick shortcut menus. We understand that as the economy recovers, everyone is getting busier. We have made huge strides to ensure that your time is not wasted.

2. As part of our Version 10 release, Allpro Technology will now be offering **Custom Reporting Services.** Allpro Insulator has been modified to allow Allpro Technology to create, edit, and distribute completely custom reports via our Allpro Cloud Services. For the first time, Allpro Technology will be able to create reports that are designed specifically for your company, and only for your company. This will allow us to tailor any existing reports or completely new reports to meet your exact specification. All custom reports will be uploaded and distributed to your cloud database. This will allow us to distribute custom reports to only the customer that they were designed for. This will also allow us to distribute updated reports without requiring you to install any upgrades on Allpro Insulator. All custom reports will automatically sync to each computer, which will greatly reduce distribution time. The price you will pay for custom reports is on a case by case basis depending on the complexity of the report. {Requires Allpro Cloud Services – Sync Service or Allpro Cloud Services – Back 365}

3. A **new Tiered Pricing feature** has been added to Allpro Insulator. This comprehensive new feature allows users to create multiple pricing tiers for each item. Each Tiered Pricing item can have completely unique values (sales price, material cost, labor cost, description, etc.). There are multiple options that can be used to specify which tier is to be used (Job Location, Job Type, Tier Level, or any combination of these). If the Job Location or Job Type are changed at any point throughout the estimating process, all pricing values can automatically be updated. Tiered pricing is also applied to line item upgrades. *{Part of the Advanced Features Module}*

4. A new set of **Master Job Sheet reports** have been added to the Scheduled Jobs form. Master Job Sheets allow users to select a date range, Location, and Crew. The user can then view a single report which will contain all of the job sheets for the estimates that are scheduled in that date range for the specified Location and Crew. This greatly reduces the amount of time required to print out job sheets because all the job sheets will be printed as one report (separated with a page break for easy distribution). *{Part of the Advanced Features Module}*

5. The **Allpro Cloud Services – Sync Service** has been completely overhauled. The sync now runs as a Windows service rather than as a standard program. This should greatly reduce issues with the sync not starting or running properly. We have also designed the new sync to be fully administered from our cloud server. This allows us to make changes to your sync settings as well as troubleshoot sync issues without having to remote into your computers. Nearly all changes can be made on our end. We have also added a much more comprehensive sync log which contains sync statistics that both the user and Allpro Technology will have access to. For example, users will be able to view a detailed sync log for every sync which will display the quantity of records downloaded and uploaded for each table.

6. The process in how **sub-assemblies are inserted** and used has been greatly enhanced. This will in no way require users to reset up their sub-assembly items. We have just added multiple additional options in how they can be used and also improved the performance of how they are inserted.

7. There is a new "**Multiplier" column** that has been added for sub assembly items. This multiplier allows the user to select how many sub assembly items will go with each main item. For example if you had R-19 insulation as the Main item and you wanted 2 F-baffles to be included with every 1 unit of R-19, you would set the multiplier on the F-baffles to be 2. If you wanted only one half of an F-baffles to be used with every 1 unit of R-19, the multiplier would be set at .5.

8. **Sub Assembly items now show up** on an Estimate Report or Job Sheet just like any other item.

9. There is now a **Hide All Sub Assembly Items function** on the Full Details Tab of the Estimates Form. This will hide all sub assembly items which allows the user to now easily see the estimate's primary items.

10. There is new **Payroll Details grid** located on the Payroll Splits form. This grid provides comprehensive information regarding all hourly and piece work payroll splits. This information can be used to generate very specific details for administrators and employees. Complete details can be provided so employees know, to the penny, exactly what they are being paid for. Every single item, quantity, percent, etc. will all be displayed in the Payroll Details grid. *{Part of the Advanced Features Module}*

11. There is now an option to use Allpro Insulator with **Dual Monitors**. If you click the Layout Mode button at the top of Insulator there are multiple layout options which allow Allpro Insulator to fully utilize dual monitors. The Estimates form and Payroll Splits form have also been optimized to utilize dual monitors. This allows the user to have some tabs/grids moved to the second screen which provides additional room for the primary tasks.

12. There are three new user preferences to **change / save the layout** of Allpro Insulator. The first is Layout – Main Screen. This preference allows the user to setup how Allpro Insulator will open (this option is the same as the Layout Mode button at the top of Insulator.) The second preference is Layout-Estimates Form. This option allows the user to set how the tabs on the bottom grid of the estimates form are displayed. The third preference is Layout-Payroll Splits Form. This option allows the user to set how the bottom grid of the Payroll Splits form will be displayed.

13. A **detailed help bar** has been added to all primary forms and will be added to the remaining forms in future minor version upgrades. The help bar allows users to look at the bottom of the form to view detailed instructions about the current field along with whether the field is optional/required and the character limit. The user can also select the "View Video" or "View Help Page" button to display videos and web pages that are directly related to the object that they are on. This provides much more detailed and accessible help which will allow users to easily learn about new and existing features.

14. There is a preference (in Preferences or Software Users) which allows the user to set the **size of the new Help Bar.** Options are Hidden, Small, Medium, or Large.

15. The user now has the option to **export grid data to either Adobe PDF or Microsoft Excel.** This can be done by right clicking on the grid and selecting the export option from the shortcut menu. This will allow users to easily access and manipulate grid data outside of Allpro Insulator. Also note that only data displayed on the grid will be exported. This allows users to apply data filters, show/hide columns, and rearrange columns, etc. before the data is exported. The exported PDF or Excel file will be created based on the exact grid settings, so users will have full control over their exported data.

16. On the Item Details Form there is a new **field for users to enter a "Time"** for each item. For example if it takes .5 minutes to install a square foot of W4 you could enter .5 in the Time column. This allows users to better estimate the amount of time a job should take. The total time required values can be displayed on the Job Sheets reports.

17. There is a new **Auto Changeup option** on the Full Details Grid of the Estimates Form. The user now has the option to right click on a line item and select Auto Changeup. This allows the original line item to be saved in an automatically created Auto Changeup package. The user can then make changes to the original line item while keeping a detailed record of any changes made.

18. If the user clicks the "Data" Button on the top toolbar, there is a new option to **Create / Access Estimate as another sales rep**. There is also new permission called Create / Access Estimate As which must be set to read / write to allow the user access to this feature. This new feature allows administrative users who often create estimates for other users to easily create estimates as if they were that other user.

19. Users now have the ability to **store and associate pictures with a job.** This allows users to upload pictures associated with a specific job and enter comments for each picture. These pictures can be viewed from the Customers, Estimates, and Job Costing forms.

20. Users can now **associate employees with an appointment** on the Scheduled Jobs tab of the Load Sheets form. This will help make scheduling jobs even easier. Then when performing payroll splits on the Payroll Splits form, the user will be able to easily see which employees were associated with the scheduled job for any given day.

21. Users can now load a **"Manager" Dashboard**. This will remove the Sales Rep filter from the User Dashboard and allow the user to see every sales rep's information with regards to estimates and invoices. The dashboard graphs will also load values from all estimates / invoices to provide a better overall picture for managers.

22. **Date/Time Created and Date/Time Updated** fields were added to the Item Details form so the user can easily track any item price changes.

23. The **Global Access, Date/Time Created**, **Date/Time Updated, Updated By, and Updated On** fields have all been added to the following forms: Estimates Form, Job Costing Form, Payroll Splits Form, Estimate List, Package List, and QuickBooks Ready List. This will allow users to easily track data changes as well as see who those changes were made by.

24. The **Estimate Class and Estimate Category** fields have been added to the Estimate form and all associated forms. These fields can be used for estimate categorizing and classifications to allow users to easily group and sort estimates.

25. The Check All Checkbox located on the Packages grid of the Estimate Form has been removed. This checkbox was replaced with a **Package Presets** dropdown list. This allows users to select a value from the dropdown list and then the corresponding checkboxes will be checked. This allows users to quickly check multiple checkboxes based on the preset selected.

26. On the Packages Tab of the Estimates Form, the Package Name was moved to the first column. Now when a user enters a Package Name, the **Package ID value** will be set to match the Package Name by default. As we have noticed that most of our customers now use the same value for each, this will eliminate requiring any double entry.

27. There is a new grid on the sync log form that allows users direct access to their live **detailed cloud sync details.** This provides much more details about the sync than the standard sync log. For example, users will be able to see sync statistics for every sync (quantity of records downloaded and uploaded, for each table).

28. Line item upgrades are now **automatically updated** when a user runs the Update Prices/Costs utility.

29. When manually entering an Estimate Number, Allpro Insulator will now automatically check to make sure that the **Estimate Number does not already exist**.

30. On the Estimates form, users can no longer **set the Price Style or Job Status** to a value that is not included in the dropdown list.

31. The double-click to view **column view** on the Estimates form has been removed. Users can still select the Column View button to view the Column View.

32. There is now a **Remote Support button** on the main toolbar of Allpro Insulator. This button will take the user to www.fastsupport.com which will allow Allpro Technology to provide faster remote support.

33. There is now a user preference to warn a user when trying to open a **form that is currently open.** If this box is left unchecked the form will just open. If the box is checked a warning will pop up when trying to open a duplicate form.

34. On the Full Details grid of the Estimates Form **users can now right click** on a line item and have the option to view the current Item on the Item Details Form. When selected, the Item Details form will open and the current item will automatically be selected.

35. On the Full Details grid of the Estimates Form **users can now right click** on a line item and have the option to view the current Product on the Product Details Form. When selected, the Product Details form will open and the current product will automatically be selected.

36. After a payroll split is applied in Version 10, the **time sheet record will be locked**, as will the payroll split record. This will prevent users from accidently including a previously paid employee in the next split.

37. On the Customers Form, Estimate Wizard, and Customer / Job tab of the Estimate Form the user can now **enter the city** they will be working in and it will automatically fill in State and Zip Code.

38. If a user enters a zip code on the Customers form or Estimate Wizard that does not already appear in the dropdown list, the user can **automatically add the new zip code** to the list.

39. The **User Dashboard** now includes Shortcut menus which can be accessed by either right or left clicking in each of the different grids. These shortcut menus allow the user to quickly and easily access various forms based on the record selected.

40. In Version 10 users can no longer make any changes to an Estimate if there is not a **valid Customer / Job selected**. A gray panel now covers the form until a Valid Customer / Job is selected.

41. In the Software Users form there is a new permission called **Line Item Description** which provides the ability to lock Line Item Descriptions.

42. When Allpro Insulator first opens up, **a new Tips and Tricks message** will be displayed while the license is being processed. This provides users with useful information while they are waiting for Allpro Insulator to load.

43. The **last sync** (if sync is being used) will be displayed at the bottom of the log in screen directly below where the User Name is selected. This allows the user to easily see the last time their data was synchronized.

44. On the User Preferences form, the user now has the ability to add up to **5 different state zip code filters.** Filter Zip Code Lists by State is the name of the preference and all states must be separated by a comma. This allows companies working in multiple states to have access to additional zip codes.

45. There is a **new User Wizard**, which allows the user to create a new user or edit an existing user's permissions. This new wizard streamlines the process of working with users and helps ensure all data is completed correctly.

46. There is now an option on the Options Tab of the Company Setup form to **lock a package after a PO is applied**. If this option is set to true, the package will automatically be locked when a PO amount is applied.

47. There is now a **global access checkbox** in Insulator that allows everyone to see an estimate, even if the estimate was made by a different sales rep.

48. On the User Dashboard there is now a **recent estimates panel** which lists recent estimates that have been worked on. In the Recent Estimates Panel, if the user right or left clicks within the panel, a whole list of options will be displayed. This allows users to easily access estimates that they are currently working on.

49. On the Estimates form, opening the Job Costing form or Payroll Splits form now closes the Estimate form. From the Job Costing form, or Payroll splits form, on the toolbar there is now buttons to **switch to** either the Estimate Form or the Job Costing / Payroll Splits form.

50. A **refresh button** has been added to the Find Duplicate Customers Form. (Data – Find duplicate customers).

51. **The Quick Find Panel** has been greatly enhanced. (In the very top toolbar in between reports and new window). Users now have the option to search for estimates by Estimate Number or by Customer / Job. Users can also search for a customer by Customer / Job or by Customer Name.

52. If a user right clicks on a tab in Insulator there is now an option to **close all open forms.** Users also have the option to move the open tab to a different tab group.

53. If the user tries to create an estimate using the Estimate Wizard and quits before the estimate is finished, a prompt will pop up warning them that **no new records will be created**.

54. A new procedure has been added to the Sales Reps' form that **no longer allows multiple sales reps** to be associated with the same user.

55. A **notes column** has been added to the Multi Day Splits Grid of the Job Costing form.

56. When a user tries **to delete an estimate**, there will now be two prompts that pop up warning the user that they are about to delete an estimate. The second prompt will appear in all caps. This is intended to help prevent users from accidentally deleting an estimate.

57. There is now a **remove crew filter checkbox when viewing Job Sheets** from the Scheduled Jobs form. The user can click on the View Master Job Sheet Report Dialog and then Pick Job Sheets from the Report Group. Under document action on the Report Master form, the user will see a Remove Crew checkbox.

58. The **Max Length** has been set on all fields that a user can enter information into. This will prevent users from entering too many characters into a cell.

59. If a user's permission is set to read only, they will now be able to view appointments via a **new appointment tooltip.**

60. Keyboard shortcuts have been added for commonly used toolbar options.

Common Shortcuts

Close	CtrlQ	
Delete	CtrlD	
Edit	CtrlE	
First	CtrlI	(i)
Help	CtrlH	
New	CtrlN	
Last	CtrlL	
Next	CtrlT	
Prev	CtrlR	
Print	CtrlP	
Refresh	CtrlR	Only used when the form does not contain Prev
Save	CtrlS	

Additional Shortcuts - Estimates Form

ES	Ctrl1	Displays the default estimate report
JS	Ctrl2	Displays the default job sheet report
CS	Ctrl3	Displays the default cost sheet report
Full Details	Ctrl4	Makes the Full Details tab the active tab
Packages	Ctrl5	Makes the Packages tab the active tab
Schedule	Ctrl6	Makes the Schedule tab the active tab
Job Sheet	Ctrl7	Makes the Job Sheet tab the active tab
Payments	Ctrl8	Makes the Payments tab the active tab
Projected	Ctrl9	Makes the Projected tab the active tab
Customer	Ctrl0	Makes the Customer tab the active

1. In the product Details form you can now enter a full name while doing a search for Product ID and you will not get an error.

2. On the Item Details form the Active Checkbox can now be checked or unchecked.

3. In the Options Tab of the Company Setup Form, if you change "Set Package Date Completed to: Today" to "Prompt" It will prompt you twice when you change the completed date of the package (on the packages tab of the Estimates Form) to today.

4. If you use the rename Customer or Rename Job utility on the Customers Form, it will no longer allow you to rename a customer or job to something that already exists.

5. If creating a new Estimate using the Estimate Wizard the default Job Type is no longer set to be "New Job" provided the user has a Default Job Type preference set on the Preferences form.

6. In the notes tab of the Estimates Form, if you right click in the notes grid there is an option to right click in the grid and load all line item notes. This allows the user to delete any and all line item notes. This way there will be no orphaned notes.

7. In previous editions occasionally Line Item Notes would not show up correctly on an Estimates Report. This issue can now be fixed by ensuring that each line item has a unique sort order value. You can ensure this by going into the Company Setup form, going to the options tab and setting the Estimate Line Item Sort Order to either Line Item Order or Item Details Order. If set to Line Item order the sort order will be determined based on the order your line items exist in the Estimates form. If you choose Item Details Order the sort order will be based on the sort order set in the Item Details form.

   You no longer have to close and reopen an Estimate form to get newly setup Sub-Assembly items to appear correctly.

We have made SEVERAL other minor improvements and fixes that are not listed here. This is by far the largest upgrade we have ever offered and we are sure that you will find these countless enhancements extremely valuable!

Continued Advancement!

As you can see, we have continued our promise to always look forward and ensure that Allpro Insulator remains the most advanced and feature rich software available for insulation contractors. Fortunately, 2014 was our best sales year ever so we were able to put a great deal of time and money into Allpro Insulator Version 10. Our staff spent over four full months working on the current upgrade. We know you will be very happy with all the new improvements we have made to the software.

Thank You For Your Input

Most of the new features listed above were ideas we received from our users. We appreciate your input and we will continue to work hard to help streamline your business processes. All of these new features should help make your business more profitable and productive.

Order the Allpro Insulator Version 10 Upgrade

We have included a custom upgrade quote for each of our customers with this Upgrade Details Report.
1. **Order by Credit Card:**
   To pay by credit card, fill out both pages of the attached quote and fax it back to (720) 293-7615.
2. **Order by Check:**
   To pay by check, fill out both pages of the attached quote (excluding the credit card portion) and then fax it back to (720) 293-7615. We will create your order in advance. Then make your check payable to "Allpro Technology" and mail your check to: Allpro Technology, 2425 S Blodgett Rd, Lake City, MI 49651.

Early Renewal Discount

At Allpro Technology we strive to keep our pricing consistent year after year. We have only had three broad price changes since Allpro Insulator was released in 2005. That said, as we continue to spend a great deal of time working on the upgrade each year (a full four months this year), we do need to ensure that our upgrade prices are in line with our development costs. Effective 4/24/2015, we will be offering an Early Renewal Discount followed by a price increase. If we receive your order and payment by 06/27/2015 (60 days from release), your upgrade price will be the same as last year ($300 for the first license and $100 for each additional license). After 06/27/2015, the upgrade rates will be raised to $400 for the first license and $135 for each additional license. The Early Renewal Discount will be offered every year to provide consistent pricing.

Allpro Insulator Version 10 Release Date

Allpro Insulator will be available for download on **Wednesday, April 29th, 2015**. Once we receive and process your order, you will receive an email with download instructions.

Fully Automated Upgrade Process

Please note that this year's upgrade is completely automated. Users can simply run the simple Windows Installer, your current software, and database will automatically be upgraded to Version 10. The entire upgrade process takes less than five minutes per computer. **Note that if you are using Allpro Cloud Services – Sync Service**, we will need to coordinate and schedule your installation. You will be able to install the upgrades on your computers, but we will need to update your cloud database at the same time. This will need to be a scheduled install.