# 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 12.0.0 – Release Date: 08/01/2017*

---

*Primary Enhancements*

---

1. One of the largest additions to Allpro Insulator for V12 is the **Analytics Menu** and its included features, located on the top menu bar of Allpro Insulator.  This **new menu** includes the regular Report Manager, All New Dashboard Manager, All New Dashboard Viewer and the All New Advanced Costing Wizard.  These 4 features combined allow users of Allpro Insulator to manage data and create functional reports and **stunning visual dashboards** with a few clicks of the mouse.  {Portions are part of the Advanced Features Module}

2. The **All New Dashboards Manager**, Dashboard Viewer and Sales Rep Dashboards are all features that are included in the new Analytics Menu.  These features allow users to view and deploy **stunning dashboards** from within Allpro Insulator.  Each of the dashboards can be **edited and modified** using the data within your database.  For the first time, users of Allpro Insulator have **complete control** of how their data is being displayed in front of them.  The Dashboards can be setup and permissioned, so that only specific users can view each dashboard.  The Sales Rep Dashboards limits the Dashboards for each specific Sales Rep to only show the data that is specific to them. {Part of the Advanced Features Module}

3. The **All New Advanced Costing Wizard** is one of the most impressive features added to Allpro Insulator, it allows users to not only view costing reports, but have control over the filtering criteria.  The data set that was created for this feature includes all relevant tables, including a combination of Time Sheet and Estimate data for the first time.  The ability to create and save the filter criteria allows for users to setup their costing report data exactly the way they want it and continue to print future reports in an **efficient manner**.  This feature is powerful and comes with a complete set of 86 all new reports. {Part of the Advanced Features Module}

4. The **Estimate List** was modified to include **Automation** features, which allows users of Allpro Insulator to update Estimate Progress, Job Status, Job Start, Projected End, End Dates, Estimate Comments, Invoice Comments directly on the Estimate List.  This allows for these fields to be updated without having to go into each singular estimate.  Each of these fields also has their own separate user permission.

A. The ability to change Estimate Comments and Invoice Comments was added to the Estimate List Automation. These fields can now be **updated easier** and in bulk actions and one by one without opening the Estimate Form.

B. The ability to change Estimate Progress from the Estimate List has been added to the Estimate List. This has been a **highly-requested feature** and will save users time in having to open each Estimate to change the Estimate Progress.

C. The ability to change Job Status has been added to the Estimate List through the Automation Menu.

D. The ability to change the Job Start, Job Projected End and Job End Dates has been added to the Estimate List through the Automation Menu.

5. The **Customer List** was modified to include **Automation** features, which allows users of Allpro Insulator to update Job Status, Job Start, Projected End and End Dates directly on the Customer List. This allows for these fields to be updated without having to open the Customers Form. Each of these fields also has their own separate user permission.

A. The ability to change Job Status has been added to the Customer List through the Automation Menu.

B. The ability to change the Job Start, Job Projected End and Job End Dates has been added to the Customer List through the Automation Menu.

6. The Estimate and Customer List **Automation** Menus also have the options to **Send Batch Emails**, Create Mailing Lists and View those Mailing Lists for future use. Batch Emails will allow for users to send emails to multiple recipients with a **few clicks of the mouse**. Emails Drafts can be created using the Email Drafts form to allow for a quick and easy method of using the Batch Email feature. Users can now filter the lists and send batch emails to customers with ease. Within the Mailing Lists, **mailing labels** can also be printed to send non-email print communications easier.

7. **Due to popular demand**, the Package Renaming has been changed to not automatically occur when modifying the Package ID. The **Package Renaming** now occurs from a right-click action on the Packages Tab of the Estimates Form. The function has also been removed that renames the Package Name when the Package ID is changed.

8. A **Percent Completed** tracking feature has been added to the Line Items, Packages and Estimates within Allpro Insulator. Included in this feature are two columns, one calculated based on the Act Mat Unit Qty entered on the Projected vs. Actual Tab or the Job Costing Form. The other column is a Manual Completion column, which lets you enter Percent Complete values manually that are not connected to any calculated field. The fields are present on the Projected vs. Actual Tab, Packages Tab and Full Details Tab of the Estimates Form as well as the Estimate and Package Lists.

9. The ability for **Field Header Renaming** has been added to all **grids** within Allpro Insulator V12. The ability now exists to **modify column headers** by double-clicking on the text and saving the grid layout. Please note, since the column header changes are made as a grid layout save, during upgrades the column headers will need to be re-saved.

10. In Allpro Insulator V12 we added **14 all new reports**, that include:

A. New Job Sheets were added that now include Labor 1 and 3 combined.

B. All new **Estimate Change Order** reports have been added to the Estimates Form. One Estimate Change Order has been added that includes the Estimate Detail and one that includes only a Change Order summary.

C. All new **Job Purchase Order** forms have been added to Allpro Insulator on the Estimates Form. These reports can be accessed from the Job Sheets menu and make it easier to create simple purchase orders to send to individual suppliers.

D. Two reports have been added to the Scheduled Jobs Form, both reports were created to show the Estimate Total along with the scheduled appointments.

E. Three new Item Details reports were added that include all items and item types, to include regular items, sub-assembly items, tiered pricing items and item upgrade items in 1 report.

11. **Multiple report datasets** have been modified and created that will allow for **more custom report options**. This may help users that have had previous custom report requests, however may have incurred an additional cost to create the dataset. For more information regarding custom reports, please call (231) 839-7928. {Allpro Cloud Services is Required for Custom Reporting}

12. The ability to add **Separate Invoice Comments** to the bottom of each Invoice is now available. On the Company Setup Form, Comments Tab, a new text box has now been added to separate out the Estimate Comments from the Invoice Comments. When an **Invoice** is created, the Invoice Comments from the Company Setup will be inserted instead of the Estimate Comments.

13. The ability now exists within Allpro Insulator to create Estimates and Invoices with **negative numbers** for the Subtotal, Total, Total Due and other Total fields. This ability is present on the Estimates Form, Estimate/Invoice reporting and the **A/R Center**, including reports. Any Customer and Job with a negative value for the Amount Due will show up in the same manner as someone with a positive amount due.

14. The ability to **Send Emails** from Allpro Insulator without having to send an email or other report now exists from within Allpro Insulator. This feature allows individuals to send emails to all recipients that are included within Allpro Insulator. This feature will **be helpful** for individuals who do not have another external email client installed on their computer and use Gmail or another web client. The Create Email feature is located on the top menu bar of Allpro Insulator.

15. The ability to select **multiple recipients** when emailing out of Allpro Insulator now exists. In addition to this feature the ability to select a **CC** and a **BCC** were also added. The additional addresses can be added using the simple interface or by typing them in and using semi-colon separation, like that of other emailing programs. As part of this feature, **all email addresses**, from all forms have been added to the grid.

16. The ability to edit the **Line Description** for each line item in the Full Details Tab of the Estimates Form has been added back to the program. In V10 and earlier the option existed as the Description Tab at the bottom of the

Estimates Form, this has been changed to a right-click action menu option in V12.  When selected, a **pop-up** will open that will allow for easy editing of the Item Description.

17. A **User Attachments** feature has been added to Allpro Insulator V12.  This feature allows users to add attachments to the User Attachments tab of their Preferences Form.  These attachments can be easily selected when email from the program in all Report Master windows.

18. A new **Quick Invoices** feature has been added to Allpro Insulator as part of the **Advanced Features Module**.  This feature allows users to **quickly and easily** send out multiple invoices to the same customer or recipient.  In many cases there could be multiple invoices for the same Customer, this allows users to send all of the Invoices to the same Customer at a much faster pace. {Part of the Advanced Features Module}

19. The ability now exists to **Manage Payments** directly from the A/R Center form, the need no longer exists to enter each singular Invoice to enter payments.

20. The **statuses** on the SchedulePro calendar have changed slightly in the newest version of Allpro Insulator.  The statuses are now labeled as "Show time as" within the program and are now only added by the users of the program.  No program defaults exist within Allpro Insulator.

21. The ability now exists within Allpro SchedulePro to **"Restore Default State"** of any appointment on the calendar.  This can be selected with the right click menu when right-clicked on any appointment that has labels or statuses applied to it.

22. The **tooltips** from within Allpro SchedulePro have now been improved to include **all selectable options** for an appointment within the tooltip.  The tooltip has also been modified to stay visible until the user moves away from the appointment.

23. The **functionality** has been added to **associate employees** with a specific appointment while in Allpro SchedulePro.  This feature still exists on the Scheduled Jobs form and has now been added to Allpro SchedulePro.  The associated employees are shown on the tool-tip as well as in the Appointment Dialog.

24. The **Add Note D/T Stamp button** is a new feature that has been added to the SchedulePro Appointment Dialog.  This link button will add a date and time stamp, including the current User to the Notes section of any opened appointment dialog.  This feature can assist with **audit tracking** of individual comments added to the notes section of the appointment dialog.  A User and Date/Time tracking has also been added to the Schedule Tab of the Estimates Form.

25. A **Date/Time and User stamp** has been added to each scheduled appointment within Allpro Insulator.  The Date/Time and User stamp is visible on the Estimates form, SchedulePro and the Scheduled Jobs Form.  This creation date was also added to the tool-tip on each appointment of the calendar in SchedulePro.

26. The ability now exists to **customize** your **Appointment Subject Line** in Allpro Insulator.  In the Options Tab of the Company Setup includes a company preference to select a specific Subject format.  The options include:

   A.  (FL-CJ) Resource First Letter - Customer/Job Name

   B.  (FL-CJ-P-AP) Resource First Letter - Customer/Job Name - Phone - Alt. Phone

C. (FL-CJ-Est-P-AP) Resource First Letter - Customer/Job Name Estimate # - Phone - Alt. Phone

D. (FL-CJ-Est) Resource First Letter - Customer/Job Name - Estimate #

E. (CJ) Customer/Job Name

F. (CJ-P-AP) Customer/Job Name - Phone - Alt. Phone

G. (CJ-Est-P-A) Customer/Job Name - Estimate # - Phone - Alt. Phone

H. (CJ-Est) Customer/Job Name - Estimate #

This **new feature** works when the appointment is scheduled using the Quick Schedule on the Estimates or Customers Form. Any appointments scheduled from within SchedulePro will keep the same subject formatting as previous versions.

27. The **Fixed Value checkbox** has now been added to the Item Details form. This will allow users to setup which Items will be excluded from calculations when setting up their Items and saving time for individuals estimating. For Items created after the V12 upgrade, the default selected for each item will become the Item default when selected on each specific Estimate.

28. **Support Links** have now been added to more locations in Allpro Insulator and Allpro Cloud Services Sync. A Support link has been added to the login screen of Allpro Insulator. The support links have also been changed to our all new MSP Anywhere platform.

29. The **Job Description** field has now been renamed to Job Location, to match the naming convention within the rest of the program. The field has also been added to the Default Grid Layout for the Estimate, Package and Customer Lists.

30. The **Quick Date** filtering ability has been fully added to the Scheduled Jobs, Estimate List, Package List, Time Sheets, Advanced Job Costing Wizard and Report Master M. Although the Quick Date existed on some of the listed forms, additional selectable options may have been added.

31. Users can now **store negative values** for the Estimate Subtotal, Total and all other Total fields. The negative numbers will also translate to Invoices and the A/R Center. This allows for users to keep track of customers that have credits or negative balances on their accounts.

32. The **Equipment Form** has been removed from the **Advanced Features Module** and added to the standard version of Allpro Insulator. All users can now access the Equipment Form and add Equipment for selection through-out Allpro Insulator.

33. The ability now exists to select an **Equipment ID** on the **Job Sheet Tab** of the Estimates Form and have it show up on the Job Sheets. Previously, this value would only show up if an appointment was scheduled, the Equipment ID was selected with the appointment and the Job Sheet was opened from the appointment itself.

34. Our **Allpro DSign Service** has been modified to allow for **Percentages** on the Estimate to be applied to options and upgrades that are chosen during the DSign process. Each Percentage which includes the Add Charge checkbox being checked, will be summed together and applied to any accepted option or upgrade. {Allpro DSign and Allpro Cloud Services is Required}

35. Starting with the **Allpro Insulator V12**, all Allpro Cloud Services communications will now be fully encrypted using a **256-bit SSL** encryption.   {Allpro DSign and/or Allpro Cloud Services is Required}

36. The **right-click option** that allows users of Allpro Insulator to Export to Microsoft Excel or create an Adobe PDF of a specific grid has been added to the rest of the program.  This feature now exists for every main form within Allpro Insulator.

37. The **Common Email Provider** settings have been updated based on changes over the past year.  The settings for Gmail has the port of 587, for Charter the Authentication is SSL, for GoDaddy the outgoing server is smtpout.secureserver.net and the port is 80, for Yahoo the port is 587.

38. A **warning window** has been added to Allpro Insulator on the Estimates Form, Full Details grid when a user inputs an Item without an Item ID.  This warning is intended to let the user know that entering Items without Item IDs is not the intended method for Item entry and can cause unintended issues.

39. An **Architect Form** has been added to Allpro Insulator.  This form allows users of the program to keep track of specific Architects for each specific Customer and each specific Job.  The Architect field is a drop-down field that is accessible on each **Customer and Job** selection area of the program.  The values from the drop-down fields are filled in based on the entries entered into the Architect Form of Allpro Insulator.

40. A **prompt** has been added so that when Line Items on the Estimates Form are copied using the CD button, a prompt will ask if any associated **Line Notes** also want to be copied.  This feature was added by request to save time while copying line items, so that all notes can be also copied to any additionally created line items.

41. A **new feature** has been added to allow multiple company/database users to **switch between companies/databases** easier than ever before!  Users can now select the Switch User/Database to easily jump between companies, databases or even different Users within the same Company.  A prompt was added to this feature to inform users that all tabs and forms will need to be closed and saved prior to switching.  {Additional Purchase Necessary for Database Switching}

42. A **Unit Rounding** option has been added to the Projected Unit Quantities within Allpro Insulator.  A Unit Rounding field has been added to the Item Details form.  This allows users of Allpro Insulator to specify which items need to be rounded to what value when calculating **Projected Units** in the program.  The rounding can range to the nearest whole number to the seventh decimal place.  It is important to understand that although this changes the rounding within the program for each specific line item, the changes are not passed to the reporting.  If changes need to be made, a custom report will be required.

1.  The ability to set permissions for each of the Estimate List Automation features has been added to the Software Users Form.  No Access and Read Only will not allow the user to access these features.

2.  The ability to set a permission for changing the Package Status on the Packages Tab of the Estimates Form.  When set to Read/Write, the user will be able to change the Package Status.  When the permission is set to No Access, the user will not be able to change the Package Status.

3.  The ability to set a permission for changing the Estimate Number on the Estimates Form.  When set to Read/Write, the user will be able to change the Estimate Number.  When the permission is set to No Access, the user will not be able to change the Estimate Number.

4.  A Rename Job permission has been added to the Software Users form.  This permission controls whether a user can rename a specific job on the Customers Form of Allpro Insulator.  When the permission is set to No Access or Read Only, the user will not be able to rename the job.

1. The issue has now been fixed that causes a Red X to appear across the Estimates Form when closing the form. This issue, in some cases would also cause the Estimates Form to be inaccessible once the issue occurred, until Allpro Insulator was restarted. This issue has been remedied.

2. The bug was fixed that caused the User Calendar to re-appear after the calendars in SchedulePro are refreshed, either from accessing the Manage Resources grid or hitting Refresh on the menu bar. When the Disable User Calendar is checked on the User Preferences Form, the User Calendar will not appear when refreshed.

3. The bug was also fixed for the calendar that would not keep User Preference settings for Default Calendar View and Groupings after the refresh button was pressed. The User Preference settings are now set correctly.

4. A bug was fixed that caused the Difference field in the Projected vs Actual Tab on the Estimates Form to not update properly. This has also been fixed on the Job Costing Form.

5. The bug is now fixed that caused the renaming of the Package ID on the Estimates Form when creating new Packages or Line items within Allpro Insulator.

6. The recurrence feature of the SchedulePro form has been changed to not allow the usage of this feature when a Customer and Job is selected. Although this feature is not a bug, the feature and its internal controls will not allow for the creation of a recurrence appointment without issues.

7. The Dsign list will no longer allow for the deleting of individual records while the form permission is set to Read Only.

8. The Allpro Insulator Backup/Restore function which is located in the Data menu of Allpro Insulator did not work on any version where the database was being managed using SQL Server 2014. The feature to easily backup databases no longer exists in SQL Server 2014 and above and has now been removed from Allpro Insulator. We recommend utilizing our Allpro Cloud Services as a backup option or purchasing a 3rd party backup option that can backup attached SQL Server databases.

9. The issue is now fixed that caused Invoices that were created with the Produce Invoice feature to not automatically calculate the due date based on the terms for the Estimate. When an Invoice is created using any of the methods from within Allpro Insulator, the due date will automatically be filled in.

10. The Crew 1 and Crew 2 dropdown lists have now been fixed on the Sub-Assembly and Upgrade lower grids, located on the Item Details form. In V11, the dropdowns could not be selected and therefore, no selection could be made.

11. The issue existed in the past where negative numbers could not be stored within the database for Estimate values and totals. This issue has been fixed.

12. Although this is not a conventional bug, an error message has now been added to Allpro Insulator to let users know about the parameter restrictions for exporting reports within Allpro Insulator.

13. The issue has now been fixed on the Terms Tab of the Company Setup that would cause individual terms entered to not be saved, if only 1 term was being entered.

14. Recurring appointments can cause issues with appointments within Allpro SchedulePro. They are not intended to be used fully with the Customer/Job and other features that have been added in our current calendar configurations. Due to these issues we have blocked the ability to create recurring appointments when the Customer/Job field is selected. Recurring appointments can only be made for appointments with only a subject present and no Customer/Job.

15. The issue has now been fixed to show records within the Email Drafts form without assistance from Allpro Technology. The records in the Email Drafts form will now show up in the Email Drafts form and can be used to create Email Drafts for use within Allpro Insulator, for more information on Email Drafts, click here.

16. The issue has now been fixed that would not send the Round Package Record to QuickBooks as needed. The Round Package Item will now move to QuickBooks when Estimates or Invoices are moved over.

17. An error was removed on the Report Master M when trying to directly print any report that passes parameters to the report. Any report that has date groupings or specific category groupings has to pass parameters to the report in order to display the correct information. This has to occur as the report is being displayed, thus the report must be viewed and then printed or exported. A message box will now appear on any report where the parameters are being passed.

18. During Item or Product creation within Allpro Insulator, if a blank row containing **ENTER ID** is created and then duplicated, it will cause an infinite loop, forcing the user to close the program. This issue has been fixed by outputting the time unit of milliseconds to the end of the **ENTER ID** field. This will stop any individual from creating this infinite loop scenario.

19. The bug has been fixed that caused a .NET error when users entered a non-integer into the Target Profit Margin or Actual Material Unit Quantity fields. Although users are still not able to enter non-integers, a message box will appear, letting the user know that this is not allowed.

20. The V12 Allpro Insulator Database has been modified to identify between companies/databases in every form and procedure. In previous versions, some of the forms were not completely setup to separate out the DFID field that separates records from within the database.

*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. We were able to put a great deal of time and money into Allpro Insulator Version 12. 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 12 Upgrade

We have included a custom upgrade quote for each of our customers with this Upgrade Details Report. If you have not received a quote, you should receive one within the next few days.

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 scan and email it back to info@allprotechnology.com. 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. We will schedule your upgrade installation as soon as we receive your payment.

## Allpro Insulator Version 12 Release Date

Allpro Insulator will be available for purchase on **Tuesday, August 1st, 2017**. Once we receive and process your order, you will receive an email with download instructions. Note that if you are paying by check, you will receive the download link after we receive your payment. The upgrade will be ready for download or install starting on August 10th, 2018.

Place your order by **8/5/2017** and receive 1 free hour of support to help you get moving faster with Allpro Insulator V12. At Allpro Technology we strive to keep our pricing consistent year after year. We will be offering a reduced price followed by a price increase. If we receive your order and payment by **08/31/2017** (30 days from release), your upgrade price will be $500 for the first license and $125 for each additional license.

After 08/31/2017, the upgrade rates will raise 20% based on the original upgrade price listed above.

## 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 12. 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.