



## *Allpro Technology*

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*Allpro Insulator Version 13.0.0 – Release Date: 09/01/2018*

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### *Primary Enhancements*

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## NEW ALLPRO INSULATOR ONLINE WEB PORTAL DETAILS

We are very pleased to announce **the release of our all new Allpro Insulator Online Web Portal.**

This new web portal will serve as an online companion to Allpro Insulator, allowing our users to access their Allpro Insulator data from virtually any device with an internet connection. The optimized web portal will automatically resize, offering a user-friendly experience on mobile devices, tablets, and desktops alike.

1. Compatible Devices Include, but are not limited to:
  - A. Smartphones
  - B. Tablets
  - C. Laptops
  - D. Desktops
2. The web portal is also fully compatible with the following operating systems:
  - A. Windows
  - B. Android
  - C. IOS
3. The new Allpro Insulator Online Web Portal will provide the following functionality:
  - A. **Customers & Jobs**
    - i. View Customer Details
    - ii. Create New Customers
    - iii. Edit Customer Details
    - iv. View Job Details
    - v. Create New Jobs

- vi. Edit Job Details
- vii. Delete Jobs
- viii. Upload & View Job Pictures (Full Gallery and Slider Views)
- ix. Enter/Edit Job Picture Details (Picture Categories and Comments)
- x. View Related Estimates
- xi. View the DSignature List & Proposals

**B. SchedulePro**

- i. View the Calendar, Using Familiar SchedulePro View Formats
- ii. View Schedule Details
- iii. Create New Appointments
- iv. Edit Existing Appointments
- v. View Associated Customer/Job Details
- vi. View Scheduled Jobs List
- vii. View Associated Estimates, Invoices, Job Sheets, and Costing Sheets Reports
- viii. Upload and View Job Pictures (Full Gallery and Slider Views)
- ix. Enter/Edit Job Picture Details (Picture Categories and Comments)
- x. Enter Actual Product Usage (For Crews to Enter On-Site)

**C. Estimates**

- i. View Estimate Details
- ii. View Associated Estimates, Invoices, Job Sheets, and Costing Sheets Reports
- iii. View the DSignature List & Proposals
- iv. Upload and View Job Pictures (Full Gallery and Slider Views)
- v. Enter/Edit Job Picture Details (Picture Categories and Comments)
- vi. Enter Actual Product Usage (For Crews to Enter On-Site)

**D. Job Pictures**

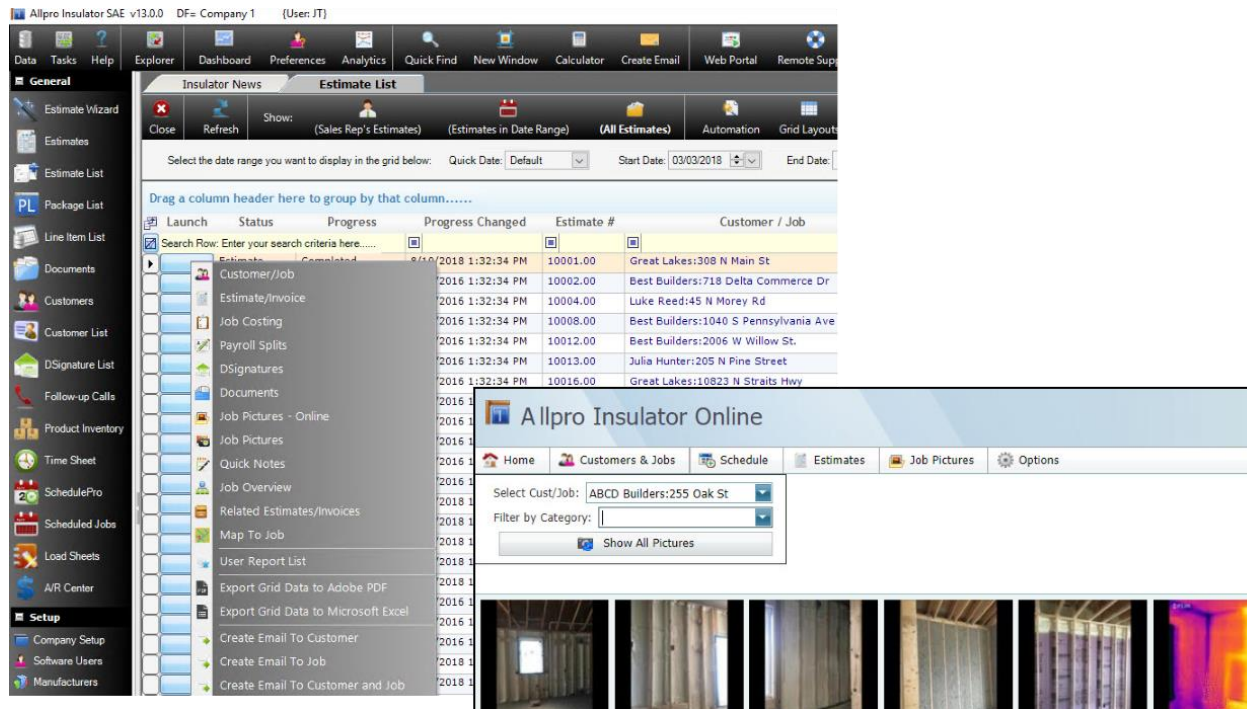
- i. Easily Switch Between Jobs to Access Associated Pictures
- ii. View Job Pictures in Photo Gallery or Slider View
- iii. Mobile Friendly Format Ensures a Clear View of Pictures on Any Device

**For more information about our all new Allpro Insulator Online Web Portal, please visit:**

- 1. [Licensing Details](#)
- 2. [Demo Video](#)
- 3. [Structure Overview](#)

## ALLPRO INSULATOR UPGRADE DETAILS

1. **An all new Job Pictures – Online** feature has been added to Allpro Insulator. This will allow users to access Job Pictures that have been uploaded using the Web Portal from within Allpro Insulator. Menu options have been added to the Launch Menus and other relevant menus to allow users easy access to the uploaded Job Pictures.



4. **An all new Documents form has been added.** This form allows users to store PDF copies of Estimates, Invoices, Job Sheets, and Costing Sheets in the Allpro Insulator Database. Users can automatically save copies of these reports whenever they view, print, export, or email the reports from the Report Master E form. Once exported to the Documents form, users can view them through the Allpro Insulator Online Web Portal or from within Allpro. The compatible reports, as listed above, can be mass produced from the Scheduled Jobs form, allowing users to view all the reports through the Allpro Insulator Online Web Portal. After modifying a document, users can replace the existing saved Document or choose to keep the existing Document and create a new one. Tracking revisions is simple when retaining saved copies. Comments, Notes, the date the Document was created, and by which user can also be added to each saved Document.

Allpro Insulator SAE v13.0.0 DF= Company 1 {User: JT}

Data Tasks Help Explorer Dashboard Preferences Analytics Quick Find New Window Calculator Create Email Web Portal Remote Support Layout Mode

**General**

Estimate Wizard Estimates Estimate List Package List Line Item List Documents Customers Customer List DSignature List Follow-up Calls

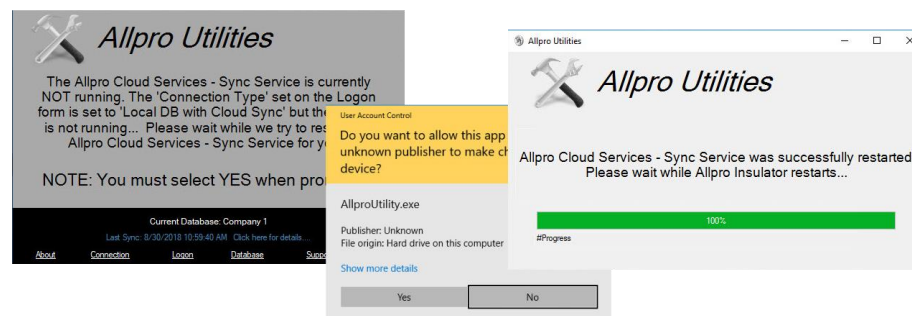
**Insulator News Documents**

Close Save Refresh Show: (Sales Rep's Documents) (All Documents) Help Qty: 195

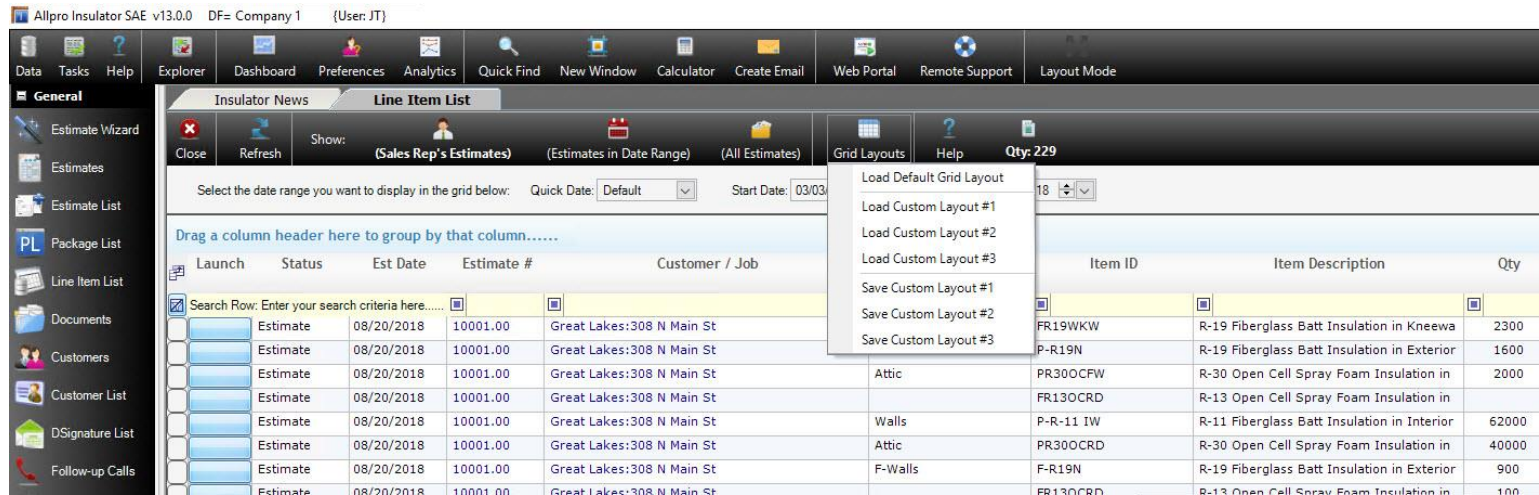
Drag a column header here to group by that column.....

Launch	View	Estimate #	Customer Name	Job Name	Document Group	Document Title	Document Comments	Sort	File Type
Search Row: Enter your search criteria here.....									
		10047.00	Best Builders	1040 S Pennsylvania Av	Estimates	Estimate Description		2.00	PDF
		10051.00	Best Builders	1040 S Pennsylvania Av	Estimates	Estimate Description		2.00	PDF
		10054.00	Boris Gill	615 N Front St	Estimates	Estimate Description #2		7.10	PDF
		10054.00	Boris Gill	615 N Front St	Estimates	Estimate Description		2.00	PDF
		10057.00	Phil Langdon	2403 Sunnyside Dr	Estimates	Estimate Detail		5.00	PDF
		10057.00	Phil Langdon	2403 Sunnyside Dr	Estimates	Estimate Description		2.00	PDF
		10064.00	Best Builders	928 South Street	Estimates	Estimate Description		2.00	PDF
		10065.00	Performance Contracting	Lot#56 - Evergreen Lan	Estimates	Estimate Description		2.00	PDF
		10067.00	Luke Reed	45 N Morey Rd	Estimates	Estimate Description		2.00	PDF

5. **Improved Reliability for Allpro Cloud Services – Sync Service.** If Allpro Cloud Services is installed on a system with Allpro Insulator, each time Allpro Insulator is opened the Sync Service status will be checked. If Allpro Insulator determines that the Sync Service is not running, the Allpro Utility will open, and the **Sync Service will restart automatically.**



6. An all new **Line Item List** has been added. This list contains all primary data from the Estimate List, along with the associated Estimate Line Item Data. The Line Item List allows users to drill down and filter specific data by Item ID, Product ID, or any other primary field. Users will find the Line Item List especially useful when they need to export specific data to Excel or PDF. Data can be exported using the default layout or one of three saved custom, user-defined grid layouts. This feature has been added to the Estimate List, as well.



7. A new **“Edit Progress Date” permission** has been added. If a user has “Read/Write” permissions, they will have the ability to edit the Progress Date Changed field on the Estimate form after the Progress has been changed. This will allow users to alter the date to reflect when a specific Progress Status changes took place, rather than the date the Progress was changed.
8. A new **“Delete Log Data” permission** has been added. If a user has “Read/Write” permissions, they will have the ability to delete log records from the QuickBooks Log, Progress Log, Price Manipulation Log, and Print/Export/Email Log. The user will have the option to select a date range that contains the records that they would like to delete. This will allow users to delete old log records that are not needed, freeing up storage space and possibly improving performance.
9. A warning message is now displayed if a user creates an item on the Item Details form that does not contain a **value in the Item ID column**.
10. The **Package Locking function** has been extended to prevent users from applying a Discount/Markup Percent or Target Profit Margin Percent to an estimate that has locked packages.
11. The Dictionary File that is referenced for the Spell Check function throughout Allpro Insulator has been updated. The previous dictionary file included references to non-U.S. based English dictionaries. This would sometimes cause words to be flagged as spelling errors, even when the spelling was correct.
12. The **“Logo and Text #2” style Header Type** has been modified to allow more space for the Company Name.
13. The **M+L Price Style** option located on the Estimate Wizard has been removed, since this is no longer a supported Price Style.
14. **Overall performance has been improved** throughout Allpro Insulator. All development tools have been upgraded and several components were redesigned to improve performance.



15. An issue that was causing the **Item ID data to not load correctly** when backspacing from a similar item on the Estimates form has been corrected. This issue was raised when entering an item, such as “W4EW”, and then backspacing to an item such as “W4”. In previous versions, the data related to “W4EW” would still be displayed, even though the Item ID would only display “W4”.
16. An issue that was causing **appointments to not save** if the Auto Subject value exceeded 100 characters has been corrected. A message box will now be displayed warning the customer that the Subject is too long and will be trimmed to 100 characters.
17. An issue that was causing **revenue totals to duplicate on the “Job Costing: Actual Package ID Costing (TS Labor)”** report has been corrected. This issue was raised when using Allpro Insulator SAE with an Estimate and an Invoice had the same Customer/Job Name. Previously, the Line Item Totals from all Estimates and Invoices for that Customer/Job would be included in the totals. Revenue totals are now calculated correctly.
18. An issue that was causing Allpro Insulator to crash **if a Global Attachment or Product Spec Sheet contained an invalid path** has been resolved. Now, when attempting to add an attachment that is located at an invalid path, a message box will be displayed informing the user that the attachment cannot be added instead. The email will still be created and sent correctly, without any attachments with invalid paths.
19. An issue that caused the **Progress Log to not save** if the Progress value exceeded 20 characters has been partially resolved. If the Progress exceeds 20 characters, the Progress saved in the log will be trimmed to 20 characters and the full Progress value will be stored in the Comments field.
20. An issue that was causing Allpro Insulator to crash if a user pressed the **Tab key while in the Logon Password** field has been corrected.
21. An issue that was **causing the Date/Time Updated value on the Item Details form not to update** when using the “Update \$” utility has been corrected.
22. An issue that was **preventing users from leaving** the Subtotal, Total, Amount Paid, and Amount Due fields at the bottom of the Estimates form when viewing an Invoice, has been resolved. In previous versions, the user would need to close Allpro Insulator to leave the field. These fields have been locked to prevent access and resolve the issue.
23. An issue that was causing some forms to **not load correctly when opened in a new window** as opposed to a new tab has been resolved. All primary forms can now be opened in a new window or in a new tab.
24. An issue that was causing a concurrency violation errors to be raised when the Date/Time field was edited on the **Follow-up Calls form** has been resolved.
25. An issue with the **Costing Sheets found on the Report Master E** form has been resolved. The Misc Costing checkbox on the Report Master E form and the DOC checkbox on the Packages Tab of the Estimates form did not function properly together. Previously, if the DOC checkbox was unchecked on a Package that included a Misc Item on Job Costing, the Item would still show up on the Job Costing Sheet.

For more information about previous version upgrades, please visit:

[http://allproinsulationsoftware.com/pdf/InsulatorUD\\_V13.0.0.pdf](http://allproinsulationsoftware.com/pdf/InsulatorUD_V13.0.0.pdf)