Allpro Technology

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

Allpro Insulator Upgrade Details

Version 6.0.0 - Released 02/28/2011 - Now Available!

This document lists features that have been added since version 5.2.2

Features Added To Version 6.0.0

1. A new **Product Details** form has been added. This form allows you to track your actual material items that you purchase from your suppliers. It is often simplest to use the manufacturer's part number as your Product IDs. You will often have multiple Item IDs that are associated with each Product ID. For example, if you use cellulose you would enter the manufacturer's part number for the bag of cellulose as the Product ID. Then you would create an Item ID for each work area that uses that product. For example you could have W4-C which could represent a 4" exterior wall that will be sprayed with the Product "Cellulose". You could also have W6-C, W8-C, etc. You could also have items like A10-C which could represent a 10" attic ceiling that will be sprayed with the Product "Cellulose". The Product Details form also allows you to easily adjust your Item costs and prices when your Product costs change. For example, if the amount you pay for a bag of cellulose increases by $0.50, you can enter the cost adjustment on the Product Details form. You can then automatically apply the cost difference to your Item Costs and Item Prices. This will greatly reduce your time spent adjusting costs and prices.

2. A new **Suppliers** form has been added so you can manage your supplier's contact information. You can then associate a primary supplier with your Products.

3. A new **Manufacturers** form has been added so you can manage your manufacturer's contact information. You can then associate a manufacturer with your Products.

4. A new **Product Inventory** form has been added. This form allows you to track your actual warehouse product inventory as well as check your projected product inventory. The Product Inventory form provides you with a place to add products to inventory when you receive them from your suppliers. Your actual inventory is calculated by subtracting the Actual Unit Qty entered on your estimates from the Unit Qty added on the Product Inventory form. The projected inventory allows you to determine how much inventory you will have at a specified date. On the Product Inventory form you can specify a date range that you would like to include in your projected Inventory. For example, you could enter 3/1/2011 - 3/12/2011. By selecting this date range Allpro Insulator will total up all of the Projected Unit Qtys from the jobs that are scheduled between 3/1/2011 and 3/12/2011. The SchedulePro calendar now allows you to associate a Crew with each scheduled appointment.   Only inventory from the products that are associated with that particular crew will be included in the total. For example, you may associate all of your Wall items with your Wall Crew while your Attic items will be associated with your Attic Crew. This functionality allows you to be more precise when calculating projected inventory since different parts of insulation jobs are often completed at different times. Your total projected inventory is calculated by subtracting the scheduled jobs from your current actual inventory. This functionality allows you to not only know how much inventory you currently have but also know your projected inventory. You can use this information to better make decisions about placing new orders from your suppliers as well as when the best time is to schedule future jobs.

5. A new **Price/Cost Adjustment** feature has been added to the Item Details form. This feature allows you to easily adjust all of the costs and prices associated with your items. The values can be adjusted by a specific amount or percent. You will have the option to select multiple items at one time so you can easily change a group of values at the same time. For example, if you wanted to increase all of your Sales Prices for all of your Cellulose Wall items you could check the box next to each of the items you would like to adjust. Then select "Sales Price" from the dropdown box. Then select "Amount" from the dropdown box. Then enter $0.02 for the amount. After you select the Apply button each of the selected items will have their Sales Price increased by $0.02. This feature makes it much easier for you to adjust each of your costs and prices.

6. New **Labor Cost 2 and Crew 2** columns have been added to the Item Details form. These columns were added so you can associate two separate labor costs with two separate crews for the same item. For example, when you are spraying cellulose in a four inch exterior wall you may have a prep crew that installs mesh and other related products to prepare for the Spray crew. If you are paying labor by piece work you may want to associate a specific labor rate that you will pay your Prep Crew (entered in the Labor Cost 1 and Crew 1 columns) and then you may want to specify a separate amount that you will pay your spray crew (entered in the Labor Cost 2 and Crew 2 columns). You can then print a separate Job Sheet for Crew 1 and Crew 2 so each crew knows how much they will be paid for the work they are doing on the job.

7. A new **Estimate Line Item Upgrades** grid has been added to the Estimates form. This grid allows you to enter upgrade options for selected line items and then display them on the printed estimate as an upgrade option. For example, if you are currently listing A10-C (Attic sprayed with 10" of cellulose at R38), you could offer A12-C (Attic sprayed with 12" of cellulose at R44) and A14-C (Attic sprayed with 14" of cellulose at R50) as upgrade options. The estimate will list the two upgrade options below the A10-C line item along with the upgrade price to go from A10-C to A12-C and from A10-C to A14-C. This new feature allows you to easily provide your customers with a list of upgrade options they can choose from.

8. A new **Estimate Percentages** grid has been added to the Estimates form. This grid allows you to easily add percentage items to your estimates. Examples of percentages you might add would be Sales Tax, Sales Commission, etc. You can choose to add the percentage amount to the estimate or exclude it from the price and store for reporting purposes only. For example, if you are calculating Sales Tax you will want to add that price to the estimate total. The value will be printed on the Estimate report. If you are calculating Sales Commission, you may not want to add the amount to the estimate price but you will want it to be calculated so you can generate reports showing a sales rep's sales commissions for a specific date range.

9. A **Custom Discount** feature has been added to the Estimates form. This feature allows you to check a box next to each line item that you would like to apply a discount to. You can then enter a percent value and select the apply button. The discount will only be applied to the selected items rather than all of the items in the estimate. This allows you to be more competitive with selected items while maintaining a more consistent price on other items.

10. A new **Estimate Comments** field has been added to the Estimates form. On the Company Setup form there is a field where you can enter comments that you would like to be printed at the bottom of all of the Estimate reports. In previous versions of Allpro Insulator if you wanted to change the comments that appear at the bottom of the estimate you would have to make your changes on the Company Setup form. There is now an Estimate Comments field that appears at the bottom of the Estimates form that by default will display the comments that you have entered on the Company Setup form. You can now edit the default text to include any additional comments you would like to make. This will allow you to make changes to the comments for a specific estimate without having to make changes on the Company Setup form.

11. A new **Crew** column has been added to the Special Instructions grid on the Job Sheet tab of the Estimates form. This new column allows you to associate a crew with each special instruction you create. By doing so, when you

filter your Job Sheets by Crew, only instructions for the current crew will be printed on the Job Sheet report. This allows you to be more specific when assigning Special Instructions.

12. The **Estimates, Invoices, and Job Sheets Reports** have been slightly revised. The comments field now has its own section which can grow and shrink based on the amount of text you enter. This allows you to enter as much text as needed in the comments field.

13. A new **Email Estimate/Invoice** feature has been added to the Estimates form. You can now select the "Email Estimate" link from the Estimates form menu bar to automatically create an email which contains the Estimate/Invoice report. This process will automatically create an Adobe PDF file which contains the current Estimate report, create a new email message addressed to the current customer, attach the Adobe PDF file to the new email message, and automatically fill in your default Email Subject and Email Message which is entered on the Company Setup form. This process will greatly reduce the time it takes to email estimates and invoices to your customers. Note that Microsoft Outlook is required to utilize this new feature.

14. A new **Sales Rep** form has been added to Allpro Insulator. If your company has multiple sales reps, you will want to enter each of them on the Sales Reps form. The Sales Reps form allows you to associate a particular Software User with a Sales Rep. These Sales Reps can then be associated with a Percentage, or Percentages, that will be added to that Sales Rep's Estimates by default. The Sales Reps form also allows you to assign a range of estimate numbers to a certain sales rep. This is useful if you have multiple sales reps that work out of the office that will be creating estimates. For example, you specify that you would like your sales rep "Jim Smith" to use the estimate number range 5000-5999. You could then specify that you would like your sales rep "Sue Jones" to use the estimate number range 6000-6999. This new feature ensures your estimate numbers don't overlap when you have multiple sales reps working out of the office. The Sales Reps form also allows you to specify the Sales Rep's estimate access rights. For example, you could specify that you want your sales rep "Jim Smith" to only have access to his personal estimates. This will filter the estimates that are displayed on the Estimates form and the Estimates list to only show Jim Smith's estimates. He will no longer have access to the other sales rep's estimates. You can also lock the prices for a specific sales rep. When you select to lock their prices they will not be able to change the prices on the Estimates form. The default prices that are entered on the Item Details form will be loaded on the estimate and the Sales Rep will not have the ability to change the prices or apply a discount percent.

15. New **Customer Communications** features have been added to the Customers form. The Customers form now includes more features that will help you manage communications between you and your customers. A new **Sub Contacts** grid has been added to the Customers form which allows you to track multiple contacts that work for a specific customer. A new **Calls** grid has also been added to the Customers form. This grid allows you to track calls that you have made to your customers as well as calls that you have received from your customers. You can also schedule a follow-up call date. You can then print reports that help you manage your follow-up calls so you never forget to follow-up with your customers. A new **Emails** grid has also been added to the Customers form. This grid allows you to import email from Microsoft Outlook so you can view all communications between you and your customers right from within Allpro Insulator.

16. The Customers form now also fully integrates with **Google Maps**. You can easily print maps and driving directions from your location (or your sales rep's location) to your customer's address or the job's address.

17. Almost all of the grids found throughout Allpro Insulator now support **Custom Grid Layouts**. We know our customers often resize columns or rearrange the order of the columns that are found throughout Allpro Insulator. While you have always been able to modify the grids they would always revert to the default layout the next time you open the form. You can now modify the grids and then select to save your custom layout. Once the custom layout is saved the custom grid will automatically be displayed each time you open the form. Most of the grids also now contain a **Field Chooser** button. This allows you to hide or display certain fields and then save those changes to your custom layout. For example, on the Item Details form there are several price

and costing fields, two of which are the Material Price and Labor Price columns. While these columns are very useful for some, others may not wish to use them or have them displayed. You can now select to hide these columns from the layout with the Field Chooser and then save your changes to the Custom Layout. These features will allow you to greatly customize Allpro Insulator to better fit your specific needs.

18. The **Import from QuickBooks** function has been slightly modified. In previous version there was one button that would import all of your Customers, Jobs, and Items from QuickBooks. There are now three options when importing from QuickBooks. The first option will Import your Customers, Jobs, and Items. The second option will import just your Customers and Jobs. The third option will import just your Items. This allows you more flexibility when importing from QuickBooks.

19. A new **Spell Check** feature has been added to several of the large text boxes that appear throughout Allpro Insulator. Example of text boxes that have been updated would be the Customer Notes field, the Job Notes field, and the Estimate Comments field.

20. A new **Data Backup System** has been added to Allpro Insulator. We highly recommend our customers have an automated backup process which will automatically backup your data daily. If you do not have an automated backup process we have added a new Backup Database form. This allows you to easily backup the Allpro Insulator Primary Database to an external hard drive or flash drive.

21. Allpro Insulator is now compatible with our all new **Allpro Web Sync** software. If you currently have a server which utilizes a VPN connection you are probably already synchronizing your out of the office sales rep's databases with the primary database in your office over the internet. We do however have several customers who do not have VPN access. We have recently developed a new software application that will allow you to synchronize all of your out of the office databases with your primary database. Allpro Web Sync utilizes cloud data storage technologies to copy the databases from each of your out of the office computers to your primary computer in the office. The best part about this software is you don't have to rely on your sales reps remembering to synchronize. All of the synchronizing is done on the primary computer in the office. All your sales reps have to do is ensure that after they have completed any new estimates that need to be synchronized they keep their computer connected to the internet long enough for their database to copy over to your main office computer. Allpro Web Sync can then be scheduled to synchronize some or all of your databases at specific dates and times. You can create multiple sync groups and schedules for the utmost synchronizing flexibility available. Note that Allpro Web Sync is a separate program that must be purchased separately.

22. **Much - much more....** While this document describes the most import features that have been added to Allpro Insulator Version 6 there are also several other minor changes that were not listed.

Best Upgrade Ever!

This is by far the largest upgrade that we have ever offered. Fortunately 2010 was our best sales year ever so we were able to put a great deal of time and money into Allpro Insulator Version 6. Our staff spent over two full months working on the current upgrade and 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 estimating process. All these new features should help make your business more profitable and productive.

Order the Allpro Insulator Version 6 Upgrade

To place an order please see the enclosed order form or visit our web site at:
http://allproinsulationsoftware.com/contractor-help-files/insulation-software-upgrades.html