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Allpro Insulator Upgrade Details Report

Version 7.0.0 – Release Date: 04/09/2012

This document lists features that have been added since version 6.4

Features Added To Version 7.0.0

1. In all previous versions of Allpro Insulator, the back end data was stored in a Microsoft Access database. In the past few years, Microsoft has moved their primary technology advances to target their flagship database engine which is **Microsoft SQL Server**. Microsoft SQL Server offers the latest advancements in database performance, scalability, and reliability. Microsoft SQL Server is also compatible with Microsoft's latest Data Cloud technologies. With the desire to ensure Allpro Insulator always offers the latest technology available, we have decided to move our back end data to a SQL Server database. The most notable differences that users will notice are an increase in performance and the ability to fully utilize Cloud Data Storage.

2. Allpro Technology is proud to now offer true Data Cloud Storage and Synchronization. We are now offering a new service called **Allpro Cloud Services**. This optional service allows mobile users to work out in the field without the use of an internet connection. When mobile users return to any location with an internet connection, Allpro Insulator will automatically synchronize their database with their company database on our Microsoft Hosted Cloud Server. Our Cloud Server will then automatically synchronize their data back to the main office. All synchronizing is done in the background, so users will not even be aware that the sync is running. Users can also continue working while the sync is running without creating any sync conflicts. Allpro Cloud Services also allows companies with multiple locations to maintain a local database at each location while automatically synchronizing the data from each office to a central location. Another benefit to this service is that a copy of your database will be stored on one of Microsoft's secure and redundant servers. The database will be backed up daily to ensure you don't experience any data loss.   Daily backups will be stored for one year. Our new Allpro Cloud Services is replacing our current Allpro Web Sync software. Note that Allpro Insulator Version 7 is not compatible with Allpro Web Sync and Allpro Web Sync will no longer be supported. Note that the Allpro Cloud Services are an optional service with separate pricing from Allpro Insulator. We have attached a separate document which covers Allpro Cloud Services in greater detail.

3. Several new features have been added to help make each user's experience more organized and productive. One of the largest user enhancements is the addition of the new **User Dashboard**. When Allpro Insulator is first opened each user will be presented with their own User Dashboard. The User Dashboard provides each user with a quick glance at all of their current activities. These activities are filtered by a date range so they are only presented with their "current" activities. The dashboard contains a small preview of data so each user never forgets to stay on top of their activities. To view more details about any of the activities the user simply double clicks on a record and their respective form will be opened to display more information. This dashboard contains the following grids:
   a. **Scheduled Follow-up Calls** – The first grid contains a list of all the current user's follow-up calls that are scheduled for the current date range.
   b. **Scheduled Tasks** – The second grid contains a list of all the miscellaneous tasks that the current user has scheduled for the current date range.
   c. **Daily Calendar** – The third grid displays a daily calendar view which contains all the appointments that the current user has scheduled for the current day.
   d. **Current Prospects** – The fourth grid contains a list of all the active prospects that have been assigned to the current user.
   e. **Pending Estimates** – The fifth grid contains a list of all the current user's estimates that have at least one package still set to "Pending".
   f. **Scheduled Jobs** – The sixth grid contains a list of all the current user's jobs that are scheduled to start during the current date range.
4. To help streamline the estimate creation process we created a new **Estimate Wizard**. The Estimate Wizard walks the user through the following:
   a. Selecting an existing Customer or creating a new Customer.
   b. Selecting an existing Job or creating a new Job.
   c. Creating a new Estimate and entering basic estimate information (Date, PO #, etc.)
   d. Creating Packages and setting Package Options
   e. Viewing a summary of the information entered
   f. Loading the new estimate in the Estimates form.

After the user has finished entering the required information into the Estimate Wizard, the newly created estimate will be displayed in the standard Estimate form where you can finish entering the estimate line items, upgrade items, etc. The purpose of the Estimate Wizard is simply to walk the user through the creation process by preventing them from opening and closing multiple forms.

5. The **Packages grid** on the Estimates form has been enhanced to include additional checkboxes. Users now have the ability to specify which reports they would like the package to appear on. These checkboxes include a "Display On Estimate", "Display On Job Sheet", and "Display On Costing Sheet" checkbox. Users also have the ability to check a "Display As Option" checkbox. If the "Display As Option" checkbox is checked, the standard "Circle Yes To Accept Package" label will appear on the printed estimate. If the checkbox is not checked, the label will not be displayed on the printed estimate. This provides users with the ability to easily display individual packages as included packages, or optional packages that must be accepted by the customer.
6. A new **Import/Update Products** feature has been added. This new feature allows users to import new products from Microsoft Excel. Users also have the ability to update Product prices from Excel. Users can create an Allpro Insulator compatible spreadsheet based on product lists from their suppliers. These spreadsheets can then be used to import or update the products that appear on the Product Details form in Allpro Insulator. This will greatly decrease the time required to create new Products and update their prices.

7. A new **User Preferences** form has been added to allow each user to set their custom preferences. There are several preferences available including but not limited to:
    a. What type of data filters they would like to apply when a form opens
    b. Which calendar view they would like to load by default
    c. Whether they would like to set manual data entry options on the Time Sheet

NOTE: If you are using Allpro Insulator Stand Alone Edition you can skip to #12.

8. The entire interface between QuickBooks and Allpro Insulator has been updated. We have a new **QuickBooks Communicator** which allows you to interface with QuickBooks from multiple forms. For example, users can send Customers and Jobs to QuickBooks directly from the Customers form. We have also added several new ways Allpro Insulator exchanges data with QuickBooks including but not limited to:
    a. Users now have the ability to **Update/Modify Customer and Job Information** that has already been sent to QuickBooks. In previous versions of Allpro Insulator, after a Customer or Job had been sent to QuickBooks, users could not modify that Customer or Job information in Allpro Insulator. All changes had to be made in QuickBooks and then reimported into Allpro Insulator. Users now have the ability to "unlock" Customer and Job information that has been sent to QuickBooks. They can then make changes to the Customer and Job information as needed. Then the next time Allpro Insulator communicates with QuickBooks, Allpro Insulator will automatically update the Customer and Job information in QuickBooks. This allows each user to modify the Customer and Job information without having to require the QuickBooks user to make those changes for them.
    b. Users now have the ability to **create new items in Allpro Insulator** and then send those items to QuickBooks. In previous versions of Allpro Insulator, all items had to be created in QuickBooks and then imported into Allpro Insulator. Users can now create items in Allpro Insulator. Then the next time Allpro Insulator communicates with QuickBooks, Allpro Insulator will automatically create the new items in QuickBooks. This allows users to maintain all item information without having to require the QuickBooks user to create those items for them.
    c. Allpro Insulator now allows users to **Import Payments from QuickBooks**. This allows users to track which Customers\Jobs have been paid without requiring the ability to access QuickBooks directly. There are several new payment reports that users can use to view QuickBooks payments in a variety of ways.
    d. **Estimate Sales Rep** information is now sent to QuickBooks along with the estimate. In previous versions of Allpro Insulator, when users sent an estimate to QuickBooks, the sales rep information was not sent. Now the estimates Sales Rep Code will be sent to QuickBooks when you send the estimate.
9. Allpro Insulator now contains a detailed **QuickBooks Communication Log**. Each time Allpro Insulator interfaces with QuickBooks in any way, a log record will be created. This log will track exactly what type of activity took place (import/export). The log will also note what data was involved (Customer Name, Item Name, etc.). Each log record will also list the user that was involved with the QuickBooks communication. There are several reports that allows administrators to track what type of communication each user is involved in.

10. A new **QuickBooks Status** field has been added to the Packages grid on the Estimates form. In previous versions of Allpro Insulator, the Packages grid simply contained a "Send To QB" checkbox. This checkbox has been replaced with a new dropdown list which allows the user to select "Pending", "Ready To Send", "Sent", or "Don't Send". This allows users more control when determining which packages should be sent to QuickBooks. Another useful benefit of this new feature is the integration with the QuickBooks Communication Log. Each time a user changes the status of a package to "Read To Send" a record will be added to the QuickBooks Communication Log. This will allow QuickBooks users to easily determine which packages need to be sent to QuickBooks. They will also know which user changed the status in case they have any questions.

11. A new **QuickBooks Ready form** has been added. This form allows users to view estimates that have at least one package marked as "Ready To Send". Users will then have the option to send estimates to QuickBooks directly from the QuickBooks Ready form. This allows QuickBooks users to easily recognize which packages need to be sent to QuickBooks for further processing.

12. A new **Item Details Column View** has been added to the Item Details form. This view allows users to view the item list in a column style view rather than a row style view. In this view the top row will display the Item ID with the Description and pricing information displayed below. Users also have the option to display a single item at a time in the column view. This makes making changes clearer.

13. Allpro Insulator now includes several **Prospect/Lead Tracking** capabilities. This allows users to easily enter prospect/lead information and assign each prospect/lead to a Sales Rep. Prospect/lead tracking is integrated throughout Allpro Insulator. Several new features have been added to help make it easier for each user to manage their prospects/leads without having to look through other user's prospect/leads.

14. Allpro Insulator now includes integration with a **Digital Signature Subscription Service**. The technology, which will be referred to as eSign Integration, allows users to send estimates directly to an eSign service. The estimate can then be emailed to your customer, where they can digitally sign the estimate with their mouse on a computer or with their finger on a touchpad, phone, or tablet. After the customer signs the estimate, the document will be emailed back to the user. This allows users to easily obtain signatures from customers without requiring them to sign and fax back the estimate. Note that this feature does require that you subscribe to a third party digital signature service. Allpro Technology does not offer the digital signature service, we simply interface with this service to automate the process for our users.

15. A new **Line Item Notes grid** has been added to the bottom of the Estimates form. This grid allows users to attach notes to an estimate line item similar to how users attach Line Item Upgrades to an estimate line item. Line Item Notes are displayed below the attached Line Item on the Estimate, Job Sheet, and/or Costing Sheet. Users will have the options to specify which reports they would like the Line Item Note displayed on. Line Item Notes cover the entire width of the report which provides more space than simply entering additional notes at the end of the Item Description. A separate form is available where users can setup default line item notes. This allows users to simply select a line item note from a dropdown list for faster data entry.

16. The **Percentages** functionality in Allpro Insulator has been enhanced. Rather than only having the ability to calculate percentages (such as tax, commissions, etc.) based on the sales total, users now have the ability to calculate percentages based on Sales Total, Material Price, Labor Price, Material Cost, or Labor Cost. Each percentage can be based on a separate value to provide the best flexibility.

17. The **integration between Allpro Insulator and the Allpro SchedulePro calendar** has been enhanced. The calendar data and controls are now accessible from additional locations making the integration even better.

18. The **Calendar's Appointment Labels** functionality has been enhanced. Users now have the ability to create an unlimited quantity of Custom Labels that can be selected when creating appointments. Users also have the ability to specify which color they would like to associate with each Custom Label.

19. The Users form now allows administrators to **insert another user's permissions** when creating new users. This allows administrators to create a new user, and then select an existing user with similar permissions. This feature greatly decreases the time required to create a new user and then set each of their permissions.

20. The Spell Check functionality has been enhanced to allow users to add words to their own **personal dictionary**. This allows user to add item codes, product names, etc. to their personal dictionary so they will not repeatedly be asked to correct common entries.

21. Users now have the ability to run **Spell Check on the Description** field located in the Line Items grid on the Estimate form. Users will also have the ability to edit description information in a larger text box for easier data modification.

22. All of the large grids that are located throughout Allpro Insulator now display an **alternate row appearance**. This new appearance makes it much easier to manage large sets of data.

23. The **Import Measurements functionality** in Allpro Insulator is in the process of being completely updated. Allpro Insulator currently imports measurements from a Hilti Laser, Disto Laser, and Takeoff Live software. We are currently adding the ability to import measurements from Planswift (which is a blueprint takeoff program). Note that we are still in the process of updating our import measurements functionality, so version 7.0 will not include the ability to import measurements from these devices and applications. This functionality will be added to a free future minor version upgrade that will be available within the next three months.

The Near Future

With the introduction of our new Allpro Cloud Services, there are several new possibilities. Later this year, we have plans to offer our customers access to their data via the web and mobile devices. Note that we do NOT have plans to convert Allpro Insulator into a web based application. It is our strong belief that the feature rich environment that Allpro Insulator provides is simply not available via the web. While providing a fully web based application is not in our future, we do see the benefit to offering our customers access to things like Customer Info, Estimate Info, and access to Schedule. These options will be available to each of our customers that subscribe to our Allpro Cloud Services.

Best Upgrade Ever!

This is by far the largest upgrade that we have ever offered. Fortunately 2011 was our best sales year ever so we were able to put a great deal of time and money into Allpro Insulator Version 7. Our staff spent over three 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 estimating process. All these new features should help make your business more profitable and productive.

Order the Allpro Insulator Version 7 Upgrade

We have modified our pricing structure to accommodate our new Allpro Cloud Services.
Please see the attached price sheet or call Allpro Technology for an upgrade quote.