



## Allpro Technology

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# Allpro Insulator Upgrade Details Report

*Version 8.1.0 – Release Date: 03/25/2013*

*NOTE (If you are using Allpro Insulator Stand Alone Edition, please skip to #12)*

1. New **QuickBooks Data Validation** has been added throughout Allpro Insulator. This powerful feature verifies all pertinent data as the user enters information on the Customers, Estimate Wizard, and Estimates forms. This includes: Terms, Job Type, Class, and Sales Rep data. By validating the data as it is entered, all data should be valid before the QuickBooks user attempts to send the Customer or Estimate data to QuickBooks. To accomplish this, all Terms, Job Type, Class, and Sale Rep data is imported from QuickBooks and used to validate all data entered. This powerful feature should greatly reduce the quantity of issues that arise, when sending data to QuickBooks.
2. A new **“Create Inventory Estimate”** function has been added to Allpro Insulator. This allows users to send Inventory Unit Quantities to QuickBooks. This feature allows users to manage inventory in both Allpro Insulator and QuickBooks. The primary benefit to this feature is that users are able to easily produce a valid balance sheet in QuickBooks because the inventory assets are also maintained in QuickBooks. The difference between the Inventory Estimate and the Standard Estimate is that rather than simply sending the square footages to QuickBooks, the Inventory Estimate sends the quantity of Actual Units (bags of cellulose, strokes of foam, rolls of fiberglass, etc.). Users will likely send the Standard Estimate to QuickBooks when the job is accepted. Then users can send the Inventory Estimate to QuickBooks after the job has been completed and the Actual Unit Quantities have been entered.
3. A new **“Create Labor Estimate”** function has been added to Allpro Insulator. This allows users to send labor cost information to QuickBooks. A separate record will be created for each employee that worked on that particular job. The labor information can be used to generate payroll information in QuickBooks as well as apply labor to job costing in QuickBooks.
4. New **“QB Inv Status”** and **“QB Lab Status”** fields have been added to the Packages grid. These fields allow users to keep track of which types of estimates (revenue, inventory, labor) have been sent to QuickBooks for each package.
5. The **QB Status** is automatically updated from “Ready To Send” to “Sent” after an estimate or invoice has successfully been sent to QuickBooks. This will save users a great deal of time when sending estimates or invoices to QuickBooks.
6. There are now more automated methods that allow users to quickly and easily **change the QB Statuses** on both the Estimates form as well as the QB Ready List form.

7. A new **“Create QuickBooks Invoice”** function has been added to Allpro Insulator. This allows users to create an Invoice in QuickBooks based on an estimate that was created in Allpro Insulator. If users do not require the ability to break a single estimate up into multiple invoices in QuickBooks, this will save a step for the QuickBooks users.
8. Users now have the ability to only send **“Package Summaries”** to QuickBooks. When selecting this option on the QB Communicator, a single line item will be created on the QuickBooks Estimate/Invoice for each package. Only the Package Name and Package Total will be listed. For users who do not require detailed billing in QuickBooks, sending only Package Summaries makes the QuickBooks Estimates/Invoices much easier to read.
9. Several new **“QuickBooks User Preferences”** have been added to the User Preferences form. This allows each user to set specific options that will be selected by default when the user opens the QB Communicator.
10. Additional enhancements to the **QB Communicator** have been made to further simplify the process of sending data to QuickBooks.
11. **Error Messages** that are displayed in Allpro Insulator, when sending data to QuickBooks, have been greatly simplified to make it easier for users to determine what they need to change in order for the data to be accepted by QuickBooks. Note that while these error message are much simpler to read, it will be very uncommon that the message will even be displayed because all data will be validated as it is entered.
12. A **“Progress”** field has been added to the Estimates form. This allows users to change the global progress for the estimate. Common examples of values a user might select would be: (Estimate, Schedule, Production, Job Costing, etc.). This allows users to view estimates that are in a specific Progress or Production Phase.
13. A new method for calculating **Employee Piece Work** rates has been added to the Estimates form. This powerful new feature allows users to base employee wages on a percentage of the labor cost amount for a specific package. Employees can be grouped by crew and percentages can be adjusted individually for each package. This provides the greatest flexibility when calculating employee wages. The wages entered on the Estimates form are also visible on the Time Sheet form. This allows employees to be paid by a combination of both hourly and piece work.
14. A new **“Actual Labor Unit Qty”** column has been added to the Projected vs. Actual grid. This new column allows users to track the Actual Material Unit Qty separate from the Actual Labor Unit Qty. For users who pay their employees by piece work, the pay splits are calculated using the Actual Labor Unit Qty. This is often useful when performing job costing on jobs that used more material than what the job should have required. By entering a separate value in the Actual Labor Unit Qty field, administrators can ensure they are not rewarding employees for wasting material.
15. A new **“Lock Package”** column has been added to the Packages grid. When selected, all the line items in the selected package will be locked and no changes can be made to those records. This is especially useful if the package has been sent to QuickBooks for invoicing. Administrators can ensure that users do not modify the package in any way after the package has been invoiced.
16. A new **“Date Package Completed”** field has been added to the Packages grid. This field allows users to track when each specific package has been completed. QuickBooks Edition users can also use this date as their Estimate Date when sending Estimates to QuickBooks.
17. A new **“Package Total”** field has been added to the Packages grid. This field displays the total for each package listed on the current estimate.
18. A **“Package Purchase Order Amount”** field has been added to the Packages tab on the Estimates form. This feature allows users to specify a specific purchase order amount for each package. The rates for each line item are adjusted so the package total matches the purchase order amount. A new **“Purchase Order Adjustment”** field has also been added. This field displays the difference between the original package total and the Package Purchase Order amount.

19. A new **“Apply Profit Margin Percent”** field has been added to the Estimates form. This field allows users to enter their target Profit Margin for the entire estimate. When applied, the rates for each line item will be adjusted so the entire estimate matches the target Profit Margin entered.
20. A **“Plan ID”** field has been added to the Estimates form. This allows users to set up an estimate template for later use. Users are then able to go to the Estimates form and select a Plan ID from the dropdown list. The values for the selected plan are then loaded into the current estimate. This feature is used to improve the process of creating multiple estimates based on a specific plan (Plan Template).
21. A new **“Update Current Prices / Costs”** feature has been added to the Estimates form. This allows users to update a previously created estimate to reflect the current Prices, Costs, Coverage, etc. Users have the ability to select exactly which columns they want updated as well as select which records to update.
22. **“Several Reports”** have been added that provide revenue, cost, and profit details by Plan ID. This allows users to track revenue, cost, and profitability for each Plan ID.
23. Several reports have been added that show **“Actual Inventory Used”** based on the Package Date Completed value. This allow users to view actual products used within a specified time period.
24. A **“Schedule Job”** tab has been added to the Estimates form. This allows users to select a date and then automatically create an appointment on the schedule for the estimate.
25. A **“Customers”** tab has been added to the Estimates form. This tab displays customer and job information for the Customer/Job that is associated with the current estimate. Some data changes can also be made to the customer and job information on this tab.
26. An **“Estimate Number”** field has been added to the Time Sheet form. This allows users to associate time sheet data with a specific Estimate Number rather than just a Customer/Job.
27. Multiple enhancements have been made to the Item Details grid. This allows users to **“adjust pricing values while a filter”** has been applied to the grid. This simplifies the process of updating only specific values.
28. A new **“Lock”** field has been added to the Item Details form and the Full Details grid on the Estimates form. When checked, this prevents sales reps from modifying the sales price for the item. This blocks both manual price changes as well as percentage price changes.
29. A new **“Exclude Form Percentages”** field has been added to the Item Details form and the Full Details grid on the Estimates form. When selected, the item will not be included in the percentages calculations on the Estimates form. For example, a user may need to add a line item for travel time, but you may not want to pay your sales reps a commission for travel time. By simply checking the Exclude from Percentages checkbox, the travel time charge will be excluded from the percentages calculations.
30. The **“Description”** field on the Item Details form is now a multi-line field. This allows users to enter detailed descriptions which can contain multiple lines.
31. A new **“Copy Down”** feature has been added to the Item Details form. This allows users to make a copy of an existing item and then simply make minor changes to it. This will greatly reduce the time required to create multiple similar items.
32. When creating new customers on the Estimate Wizard or the Customers form, the **“Customer Name”** is now validated to make sure the customer does not already exist. This will help eliminate the common problem of users creating duplicate customers.
33. The Sales Reps form now has a new **“Phone Number”** and **“Email Address”** field. The phone number and email address entered here will be displayed on the Estimate and Invoice reports.
34. A new **“Dashboard Switching”** feature has been added to Allpro Insulator. This provides administrators with valid permissions the ability to view each user’s dashboard. This allows administrators to keep an eye on the day to day activities scheduled for each user.

35. A **“Customer Discount Percent”** field has been added to the Customers form. This allows users to specify a default discount percent that the current customer receives. This default customer discount percent is automatically applied when the customer is selected on the Estimates form or Estimate Wizard.
36. An enhanced **“Allpro Insulator Upgrade Manager”** has been added to Allpro Insulator. This new feature allows Allpro Insulator to download upgrades by itself without requiring the use of an internet browser. This greatly simplifies the upgrade process and allows Allpro Technology to provide our customers with more frequent upgrades as well as make the upgrade process easier for our users.
37. All the primary grids located throughout Allpro Insulator now allow users to use **“Arrow Key Navigation”**. By holding down the Ctrl Key and pressing an arrow key, users can easily navigate around a grid in all directions.
38. The target **“Default Screen Resolution”** has been increased from 1024x768 to 1366x768. The national average screen resolution has increased over the last year as most users are now utilizing wide screen monitors. To better utilize the larger screens, we have increased the size of most of the forms located throughout Allpro Insulator.
39. A new **“Allpro Utilities”** application has been added to Allpro Insulator. Allpro Utilities automatically performs multiple tasks that previously had to be done manually. For example, each time Allpro Insulator starts it checks to see if your Microsoft SQL Server Service is running. This service is required in order for Allpro Insulator to connect to your database. If Allpro Insulator determines that the SQL Server Service is not running, Allpro Utilities will automatically start the service for you. The same functionality is available for restarting the Microsoft Data Sync Service.
40. Full integration between **“Allpro Insulator and Planswift”** has been added. Planswift is a blueprint takeoff program which can be used to measure an entire project with multiple packages. The resulting measurements can then be inserted directly into an Estimate in Allpro Insulator. Users can also copy item lists from Allpro Insulator and insert them into Planswift. This fully automated feature completely eliminates double entry. Please also note that Allpro Technology is now a Planswift Partner. If you are interested in purchasing Planswift please speak to us first. Customers who purchase Planswift through Allpro Technology, are eligible for integration discounts of **up to \$200 for each Planswift license purchased.** *(NOTE: To utilize Allpro Insulator Planswift Integration, a Planswift Integration license must be purchased from Allpro Technology. We are currently offering rebates that could completely offset this price.)*
41. A new **“User Forum”** has been added to our web site and integrated into Allpro Insulator. This allows users to interact with each other anonymously. We believe that there are times that our users would not only benefit from speaking with our support representatives, but users could also benefit from interacting with each other. Having the ability to post questions on a support forum that is viewed by our users could help each user understand how others are utilizing our Allpro Insulator software.
42. The **“Allpro Insulator Help Pages”** have been enhanced to provide more detailed help documentation.
43. Allpro Technologies new **“Time Block Support System”** has been integrated into Allpro Insulator. This allows users to view support ticket summaries as well as see how much support time they have remaining on their current Time Block.
44. The **“Users Form”** has been modified to provide better integration with Allpro Technology’s new Time Block Support System and User Forum.
45. Multiple **“Color Scheme”** options have been added which allows each user to select the primary colors displayed throughout Allpro Insulator.
46. We also have several other small changes that were made throughout Allpro Insulator that are not listed here.

## *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 2012 was our best sales year ever so we were able to put a great deal of time and money into Allpro Insulator Version 8. 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 business processes. All these new features should help make your business more profitable and productive.

## *Order the Allpro Insulator Version 8 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 mail your check to Allpro Technology, 2425 S Blodgett Rd, Lake City, MI 49651.

## *Allpro Insulator Version 8 Release Date*

Allpro Insulator will be available for download on **Monday, March 25<sup>th</sup>, 2013**. 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 and your current software and database will automatically be upgraded to Version 8. The entire upgrade process takes less than five minutes per computer.