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Allpro Insulator Upgrade Details Report

Version 9.0.1 – Release Date: 04/22/2014

Primary Enhancements

1. The method in which users interact with reports has been completely redesigned. In Version 9 we are introducing our new **Report Master** form. The Report Master allows users to easily View, Print, Export, Email, or send for a Digital Signature. When selecting the Print button from the various forms located throughout Allpro Insulator, rather than viewing a list of available reports, the Report Master form will be displayed. The Report Master form displays a list of all of the related reports, and then allows you to select the Report Action you would like to take (View, Print, Export, Email, or send for a Digital Signature).
 - a. View – Allows users to view the report with the same viewer that was in previous version of Allpro Insulator.
 - b. Print – Allows users to print the selected report using their default printer without being required to first view the report.
 - c. Export – Allows users to export the selected report without being required to first view the report. Users can select the Export Format, Export File Name, and Export File Path directly from the Report Master form.
 - d. Email (Direct) – Allows users to email reports from directly within Allpro Insulator. No third party email software is required. Users can specify the email recipient, subject, and body directly from the Report Master form.
 - e. Email (Outlook) - Users can specify the email recipient, subject, and body directly from the Report Master form. After the information has been entered, users can send the email template to Microsoft Outlook where the message can be reviewed and sent.
 - f. DSign – The Report Master form also allows users to send estimate reports to customers to be digitally signed. (This feature is discussed in detail on the DSign section of the report.)
 - i. When selecting Email or DSign, Allpro Insulator now provides users with the ability to easily select contacts from the built in email address book which contains email addresses from all of your customers and sub contacts.
2. The Report Master also provides users with a convenient way to manage their report lists. Users can create a **Custom Report List** that contains all the reports that they use most often (Estimate: Description, Estimate: Detail, Job Sheet: Description, Cost Sheet: Project Only, etc.). This feature allows users to be more productive by having easy access to all of the reports that they use most often.

3. Allpro Insulator now provides users with the ability to create, manage, and insert **Item Sub-Assemblies**.
 - a. On the Item Details form, users can select an item in the main grid. Users can then add related items to the Sub-Assemblies grid located at the bottom of the Item Details form.
 - b. Sub-assemblies are added to a master item by selecting existing items from the dropdown list that are to be related to the master item. Prices, costs, and coverage values can be set for each sub assembly as they relate to the master item.
 - c. For example, you may use 1 square foot of mesh for each 1 square foot of cellulose when used on a specific item. In another example, you may use 1 square foot of A for every 1.25 square feet of B when applying spray foam. All differences are managed by setting the appropriate coverage per unit. When adjusting quantities for the master item, the quantities for each related sub assembly item will automatically updated to match the master item.
 - d. When selecting an item on the Full Details grid of the Estimates form, after the quantity has been entered, any related sub assembly items will automatically be added to the estimate directly below the master item.
 - e. **The sub-assemblies feature should greatly increase the efficiency and accuracy of the bidding process.**
4. The **Insert Plan Template** process has been completely revamped. Plan Templates are still created in the same way as they were in Version 8, but we have added a new Insert Plan Template dialog. This dialog allows users to specify which packages they would like to include in the new estimate. During the insert process, all the selected packages and the corresponding line items will be inserted into the new estimate. This opens up several possibilities for working with Plan Templates. We believe that this feature will no longer be strictly used for working with track housing, but also allow users to create multiple estimate starting point plan templates. For example, users could create a “Residential One Story #1”, “Residential Two Story #1”, “Commercial #1”, etc. Plan Template. Then when creating a new estimate, users can select the Plan Template that best matches the current project. They can then select all of the Packages/Options/Work Areas that apply to the current project. This feature will greatly decrease the time required to create routine bids, making your sales reps far more accurate and productive.
5. In Version 9, we are introducing the implementation of **Triggers**. Triggers allow users to automatically update a value when another value in the program has been modified. Triggers greatly streamline project management by not requiring users to manually update related data when a specific action has taken place. Outlined below you will find a brief description of our new triggers:
 - a. Set Job Status to: Awarded – When a Package Status = Awarded
 - b. Set Job Status to: In Progress – When a Package Status = In Progress
 - c. Set Job Status to: Closed – When All Package Statuses = Closed or Not Awarded
 - d. Set Job Start Date to: Today – When First Package Status = In Progress
 - e. Set Job End Date to: Today – When All Package Statuses = Closed or Not Awarded
 - f. Set Package Date Completed to: Today – When Package Status = Closed
6. A new **Create Estimate Revision** feature has been added to the Estimates form. This feature is very similar to the Copy Estimate feature with the following exceptions:
 - a. The original estimate’s status will automatically be set to “Archived”.
 - b. The newly created estimate will have the same Customer/Job name as the original estimate.
 - c. The new estimate will also contain the same estimate number with an increment of “.01”. For example, if you have an estimate numbered 10055.00, the first estimate revision will be 10055.01. The second estimate revision will be 10055.02 and so on.

7. When producing invoices from an estimate, users now have the option to auto **increment their invoice numbers by “.01”**. For example, if you have an estimate numbered 10055.00 and you produce an invoice based on that estimate, the first invoice number will be 10055.01. The second invoice number will be 10055.02 and so on. This feature will make it easier for users to track related estimates and invoices.
8. Users now have the ability to **Drag Records** on the Full Details grid located on the Estimates form. Users can click on the record selector (located to the left of the record), hold the left mouse button down while holding down the Ctrl key on their keyboard. They can then drag the record to the desired location and release the mouse button. The record will be moved to the new location.
9. A new **Auto Set Sort Order** feature has been added to the Full Details and Packages grids located on the Estimates form. When selected, the sort order for the grids will be automatically set based on their current order.
10. When creating new estimates, after selecting the Customer/Job, the **Estimate’s Source** will be set to the Customer/Job’s source by default.
11. After a Customer/Job has been selected on the Estimates form, the **Customer/Job field will become disabled**. To change the Customer/Job name, users can select the enable button and then make the necessary changes. This will help prevent users from unintentionally changing the Customer/Job or related information (such as Terms, Sales Rep, Source, etc.).
12. Percentages can now be associated with a **Job Location**. When a Customer/Job is selected on the Estimates form, all percentages associated with the job selected will automatically be loaded into the estimate. This is useful when managing state and local taxes. Sales Rep Percentages are still managed in the same way they were in previous versions.
13. Users can now save a **Custom Dropdown Layouts** for the Item Category and Item ID dropdown lists located on the Estimates form. This customization could be used for several purposes. For example, if your company has multiple locations which maintain separate item lists, you could create your items using a location specific prefix. For example, take the item W4C which could be used for insulating a 4” wall using cellulose. If you have an office in Lake City and an office in Cadillac, you could create the item L-W4C for the Lake City office and C-W4C for the office in Cadillac. Then on the Estimates form, if you work in the Lake City office, you could save a filter to only show items that start with “L-” in your Item ID dropdown list.
14. The Estimates form now includes an **Icon Only Toolbar** which is located directly below the Estimates form main toolbar. This toolbar allows users easier access to menu options which are located on sub menus (such as the Print and Action sub menus). It is now possible to perform virtually all actions with one click, rather than 2-3 clicks.
15. A new **Launch Menu** is located on most list grids located throughout Allpro Insulator. The new Launch menu allows users to easily view data related to the currently selected record. For example, when selecting the Launch menu next to a specific record on the Estimate List, a menu will be displayed that will allow users to: View Customer/Job, View Estimate/Invoice, View Job Costing, View Payroll Splits, View Related Estimates/Invoices, or View DSignatures. These useful menus greatly simplify navigating related information.
16. If a user tries to send an estimate to QuickBooks that does not contain any packages marked as “Ready to Send”, a message box will be displayed informing the user that there aren’t any packages marked as “Ready to Send”. After clicking OK, the user will be directed to the Packages tab.
17. The **User Dashboard** has been greatly enhanced. The User Dashboard now contains fourteen panels to choose from. The original six panels are still available, along with several new charting dashboard panels. These charts allow sales reps to easily gauge their current prospect and estimate pipeline along with previous sales performance. The User Dashboard now also allows for customization so users can display/hide and rearrange the dashboard panels. The layout can then be saved so each time the User Dashboard loads the user can focus on what is important to them.

18. The **Default User Calendar** preference has been enhanced to further integrate with the User Dashboard. In Version 9, rather than simply displaying the User's Calendar on the Dashboard, the Dashboard will display the User's Default calendar that is set on the Preferences form. This allows the dashboard to be tied to any or all calendar resources.
19. The **Primary Interface** for Allpro Insulator has been slightly modified. We have removed the Home Screen to better simplify navigation throughout the program. The Form Explorer (which is located along the left side of the main form) has been enhanced to include virtually all forms located throughout Allpro Insulator. Users also have the option to save the Form Explorer using several different layouts (changing text size, icon size, expanding or collapsing groups, etc.). This new design should help simplify navigation by making all forms accessible from one place.

All the improvements previously listed (1-19) are part of our Version 9 primary upgrade. Please see below for our new Optional Modules and Bug Fixes.

Optional Modules

Since we released Allpro Insulator Version 1 back in 2005 we have not had a single price increase for our QuickBooks Edition and we have only had two minor price increases for our Stand Alone Edition. Our goal has always been to make (and keep) Allpro Insulator affordable to businesses of all sizes.

To help keep us on this path, in Version 9 we are introducing multiple Allpro Insulator Optional Modules. By breaking a few high level features out into separate modules that are available for purchase, we are able to keep Allpro Insulator affordable for small to medium size businesses. This also allows us to continue to provide some very high end features available for an additional fee. Some of these optional modules are available for a one-time fee while others are sold as a subscription service.

Optional Module #1: Multi-Day Splits / Equipment Inventory

The Multi-Day Splits / Equipment Inventory optional module encompasses several very powerful and useful features.

1. **Create / Manage Equipment** – Users will have the ability to create and manage multiple pieces of information on an equipment level, rather than only on a crew level.
2. **Creating Load Sheets** – Users will have the ability to assign Product quantities to a specific piece of equipment (typically a truck). For example, you may have a particular truck that will be going to three jobs on a given day. Users can select the projected product quantities from each job and insert the products to the truck. This will provide a load sheet for the crew/warehouse worker who will be responsible for loading the truck. For larger jobs that will take multiple days, users can specify how much product they would like to load on any given day.
3. With the introduction of Load Sheets, users will also have the ability to utilize our new Product Excess Multiplier Percent feature. The **Product Excess Multiplier Percent** allows users to enter a default excess percent that they would like to be used on a Product level basis. This value is set on the Products form. For example, if a user were to set a Product Excess Multiplier of 10% for the Product “FOAM”, any time FOAM is listed on the Load Sheet the projected value will be increased by 10%. (If the job calls for 2 units, the load sheet will specify to load 2.2 units.)
4. **Equipment Inventory** – Users will have the ability to manage full product inventory on an equipment level. As products are added to the equipment through the load sheets, product inventory will be removed from the warehouse inventory and then added to the equipment inventory. As products are entered on the Multi-Day Job Costing form, they will be removed from equipment inventory.
5. **Multi-Day Job Costing** – Users will have the ability to enter product usage for larger projects on a daily basis. This includes Estimate Product Usage, Miscellaneous Item Usage, and Miscellaneous Product Usage. As daily values are entered, the estimate totals will automatically be updated. As products are entered on the Multi-Day Job Costing form, they will be removed from equipment inventory.
6. **Multi-Day Payroll Splits** – Users will have the ability to calculate payroll splits daily based on the values entered on the Multi-Day Job Costing form. Currently, Allpro Insulator allows users to calculate payroll splits for each package. For larger projects that take multiple days, this can cause an issue when calculating payroll. With this optional module, users can calculate payroll splits for each day, regardless of which package they were working on. The calculations are based on the product usage that is entered each day on the Multi-Day Job Costing form.

All the features listed above (1-6) are part of the Multi-Day Splits / Equipment Inventory optional module. This optional module is available for a **one-time fee of \$799**. This is on a per company basis and this feature will be available to all Allpro Insulator users if purchased (providing you assign them permission).

Optional Module #2: Allpro DSign (Digital Signature Subscription Service)

Allpro DSign is a new service that fully integrates with Allpro Insulator. From the Estimates form users can select the Print button which will display the Report Master. From the Report Master, rather than selecting View, Print, Export, or Email, users can select Allpro DSign. The user can then automatically send the current estimate for a digital signature.

During this process, a digital signature record will be created in your database on our cloud server. An email containing your subject, body, and a link to your Allpro DSign record will be sent to your customer. When the customer selects the link, a web page will be displayed. A copy of your proposal will be imbedded in the web page as a PDF. Below the PDF your customer will see a grid which contains each of your optional packages, as well as each of your Line Item Upgrades. The user can check the Accepted checkbox for each option/upgrade that they would like to include in their project. The Approved Total will be displayed below which will be updated based on their Base Price along with all options and upgrades the customer accepted. The user can then enter their name and select the Accepted button to accept the bid or select the Rejected button to reject the bid.

After the customer has accepted or rejected the proposal, the Allpro DSign record will be updated on your cloud database and then synchronized to your local database. Users will have the ability to track all Allpro DSign records using the DSign List form directly from within Allpro Insulator. Access to all related estimate, customer, job, etc. information will be available from the DSign List along with DSign status details.

The Allpro DSign optional module will greatly streamline the process of sending proposals to customers and automatically receiving customer responses that will be tracked directly within Allpro Insulator. This service will eliminate the need for sales reps to independently manage the status of their proposals. Each sales rep can easily track and manage their proposals in one easy to use place. Administrators can also track the status of all proposals using the DSign List as well as through various reports found throughout Allpro Insulator.

The Allpro DSign service will also greatly simplify the proposal Accepting/Rejecting process for your customers. Your customers will be able to simply and quickly accept proposals on any internet connected device (computer, tablet, smart phone, etc.). This will speed up the approval process and provide your customers with a professional and effective proposal approval process, further extending your professional edge.

Allpro DSign is an optional subscription service that is sold as an add-on to our Allpro Cloud Services. Allpro DSign is sold on a per user basis, not per company or per computer. The Allpro DSign feature can be enabled for specific Allpro Insulator users. **An annual fee of \$300** will enable the Allpro DSign Service for up to three users. **An annual fee of \$75 each** will enable the Allpro DSign Service for additional users.

Optional Module #3: End User Report Editor

As we mentioned in our previous Scheduled Enhancements Report, we have plans to create a new end user report editor that will allow our users to create copies of our existing reports and then make changes to the copies. While we are still planning to add this optional module to an upcoming release, this feature is currently **NOT** available in Version 9.0. This process involves completely redesigning all 336 reports that are located throughout Allpro Insulator. Due to the time required to add this feature along with our already delayed release date, we have temporarily postponed this optional module. We will provide details regarding the module as they become available.

Bug Fixes

1. In previous versions of Allpro Insulator, it was possible to make changes to values on the Full Details grid located on the Estimates form without updating the Estimate Subtotal until the estimate was saved. This would happen if the grid summary value was not visible due to the large quantity of line items. In Version 9, all grid summary values are now fixed at the bottom of all grids. This ensures that all summary values will be updated as soon as grid values are changed.
2. In previous versions of Allpro Insulator, it was possible to create multiple Products with the same Product ID. This could cause issues with multiple reports that appear throughout Allpro Insulator. In Version 9, users will not have the ability to create duplicate Product IDs. We have also added a feature that allows users to check their existing Product List for duplicates.
3. In previous versions of Allpro Insulator, when sending Invoices to QuickBooks, the Post Status would not update properly marking the estimate as "Posted". This issue has been resolved in Version 9.
4. In previous versions of Allpro Insulator, when creating the "PSummary" item, the QB Communicator would not progress to the next step. This issue has been resolved in Version 9.
5. In previous versions of Allpro Insulator, errors would occur when creating multiple copies of estimates or inserting plan templates based on estimate copies. Issues would only occur after creating copies four levels deep (meaning a copy of a copy of a copy of a copy). In Version 9, users can now create copies up to nine levels deep.
6. In previous versions of Allpro Insulator, when inserting Plan Templates, any Line Item Upgrades that existed in the Plan Template would not be inserted into the new estimate. This functionality has been added in Version 9.
7. In previous versions of Allpro Insulator, it was possible for administrators to create a new user without inserting any user permissions. This would leave the new user with the ability to log in but not access anything else. This issue has been corrected in Version 9 by not allowing the administrator to close the Users form without inserting permission for all users.

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. Fortunately 2013 was our best sales year ever so we were able to put a great deal of time and money into Allpro Insulator Version 9. 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 9 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 make your check payable to "Allpro Technology" and mail your check to: Allpro Technology, 2425 S Blodgett Rd, Lake City, MI 49651.

Allpro Insulator Version 9 Release Date

Allpro Insulator will be available for download on **Tuesday, April 22nd, 2014**. 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, your current software, and database will automatically be upgraded to Version 9. 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.