



Allpro Technology

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Allpro Insulator Upgrade Details Report

Version 14.0.3 – Release Date: 10/26/2020

Primary Enhancements

1. An **all new Item Builder form** has been added to streamline creating new Item Details entries. Users can associate a small Product Code with each Product. They can then create multiple work areas and associate each with a Work Area Code. Once a Product has been selected, the user can designate which Work Areas the selected product can be installed in. The Product ID and Work Area Code are combined to automatically generate the Item ID and Description. Applicable Coverages and Costing information will also be included in the entries automatically. The Item Builder will greatly simplify and speed up the process of creating Item Details entries.
2. A **new pricing method** has been added to the Item Details form based on detailed markup. Users may now independently **specify a markup for Material Cost, Labor Cost (1 and/or 2), and Other Cost** (overhead). Markup Types include Markup Percent, Profit Margin, and Markup Amount. The program will calculate the Sales Price accordingly.
3. The **Update \$ utility in Item Details can now be configured to maintain the item's profit margin** when performing price updates.
4. Three new **Costing reports utilizing Time Sheet Labor** have been added to better integrate Time Sheet Labor into Job Costing.
5. The **Documents table has been improved** to store **PDF, DOC (Microsoft Word), XLS (Microsoft Excel) and PNG (image)** files in the database. Users will have the ability to open files stored in the Documents table, edit those files, and then save the file back to the database. Files stored in the Documents table can also be sorted by the specific the Customer, Job, or Estimate with which they are associated.
6. Four new **Estimate Analytics Dashboards** have been added to the Estimates form, allowing users to view a detailed graphical breakdown of the costs and profit for the current Estimate. These dashboards include Estimate Analytics by: Package Name, Product Category, and Crew, as well as Estimate Analytics with Time Sheet Labor. Unlike our traditional Dashboard Viewer, these dashboards will be accessible to users with or without our Advanced Features Module.
7. Users with Allpro Cloud Services will be able to use the new **Job Pictures Online feature to add Job Pictures to Estimate, Invoice, and Job Sheet reports** when connected to the internet. All pictures and picture comments will be displayed directly on the selected report.
8. **Job Sheet Comments** can be added through the Quick Notes form and associated with a specific Customer or Job. They will then appear on all Job Sheets produced for that Customer or Job. For example, if there is a "no smoking" policy for all jobs performed for "Best Builders", users will have the ability to associate that comment with the customer and then that comment will be displayed on all Job Sheets produced for Best Builders.
9. **Allpro DSign** has been completely redesigned from the ground up. Estimate reports will now be displayed as images so the report will display imbedded in the web page on both PC and mobile devices. Sales Rep

Comments, Customer Comments, Sales Tax, Approximate Schedule Date, and much more have all been added to greatly enhance the interaction between the sales rep and the customer. A better approval process, means faster approvals!

10. **DSign Users Only - Email Automation** has been added to the program, allowing the user to schedule automated follow up emails for Dsign Estimates. Each email can contain specific Data Tags which will automatically populate the email with data related to the selected estimate (Examples: Customer Name, Job Name, Contact Name, Estimate Date, etc.). Each email can be scheduled to be sent at a specific day and time based on the date the DSign was sent. For example, a user could specify a specific follow up email that they would like to be sent out at 9:00 am, five days after the original DSign email was sent. Once an DSign has been accepted or rejected, the automated emails will automatically stop. This exciting new feature will completely automate the email follow up process for your sales reps.
11. **Dsign Users Only** – A “Schedule Follow Up” checkbox has been added to Report Master E form for Dsign records and will **automatically create follow up call entries** on the Calls form. The scheduled follow up calls will be displayed on the sales reps’ dashboard where they can be readily accessed or referenced.
12. **Project Spec Sheets from Product Details, Global Attachments from Company Setup, and User Documents from Preferences are now stored in and retrieved from the database.** This will eliminate pathing errors for attachments.
13. **QuickBooks Edition Only** – **Product Inventory can now be added by Importing the Purchase Order** from QuickBooks, eliminating the need for double entry when adding Product Inventory.
14. A new **Qty on Order** field has been added to the Product Inventory form, allowing users to track inventory which has been ordered but not yet received.
15. Users can configure the program to provide a **Low Inventory Warning** at login if Product Inventory falls below the Minimum Qty On Hand threshold set by the user.
16. **New Customer and Job information** can be entered from the Appointment dialogue in SchedulePro using the Create Customer Wizard. This will allow users to easily schedule initial site reviews and meetings with new prospects.
17. The **User Preferences form has been reworked** to function more like User Permissions, allowing users to search and filter the list to easily locate the Preferences they are looking for.
18. When creating new **Software Users, their information can now be added to the Employees and Sales Reps** forms as part of the process. This will simplify adding users that will also need to appear on the Employees and Sales Reps form.
19. Users can now **modify the Form Explorer from Preferences** to remove unneeded items and streamline navigation, leaving only the forms that the user requires.
20. Grids which are prone to cause “text wrap” will now **automatically resize the row height** so that the entry can be displayed without having to manually resize the row height.
21. **Allpro Cloud Services Sync Users Only** - Laptops and other portable devices with a local database and Allpro Cloud Services can be configured to **use a LAN (local network) database when in the office and their local database when they are out of the office.** Users can specify which to try first. As a result, when portable device users are “in the office”, their records will show up in the LAN database without having to wait for the next sync cycle to run. Once they leave the office, data entered will automatically be mapped to the database located on their computer.
22. **Allpro Cloud Services sync status** can be checked directly from the main menu and will provide up to date sync status information on all connected endpoints.
23. An **Add Finance Charge** option has been added to the Action Menu on the Estimates form, allowing users to add finance charges based on an APR and the number of days past due.
24. In the **Estimate Wizard, Create New Job** is now the default selection on the Job section.
25. The **CD (Copy Down) function** no longer adds an extra, blank Line Item on the Estimate form.
26. **Email addresses for Sales Rep or Employees** are now automatically added to the Direct Email Address Book found in Allpro Insulator.

27. The **Report Master E** and **Report Master M** forms have been enlarged and enhanced for easier use and navigation.
28. The **“Based On”** column of the **Percentages form** was widened to ensure entries are clear and legible.

Version 13.4.0 (Previous Version Release)

- 1.** The Time Sheet form will now insert the current date in the “Date” field if no date is entered.
- 2.** A new “Load All” toolbar menu option has been added to the Time Sheet form. This will allow users to display any Time Sheet entries that may have accidentally been entered into the Time Sheet form without a Date being set.
- 3.** In previous versions, a blank line was created at the bottom of the Full Details grid of the Estimates form when creating an Auto Changeup. This issue has been resolved.
- 4.** The Skin Option has been removed from the Options form of Allpro SchedulePro. All Skin changes are now done directly from the SchedulePro main toolbar.
- 5.** An issue that caused the User Dashboard to not display properly for some users has been corrected.

Version 13.3.1 (Previous Version Release)

1. Allpro Insulator now provides an additional method to calculate the Labor Cost 1 value. The Company Setup form now includes a new "Labor Cost Percent" field. The value entered here, will be used to automatically calculate the Labor Cost 1 value on the Estimates form based on the Rate used on the Estimates form. For example, if the value entered in the Labor Cost Percent field on the Company Setup form is set to "20" and the Rate value entered on the Full Details grid of the Estimates form was set to \$1.00, the Labor Cost 1 value will be automatically set to \$0.20. If the Rate is changed using any update method, the Labor Cost 1 value will be automatically adjusted to be 20% of that rate. If no value is entered in the Labor Cost Percent field on the Company Setup form, the Labor Cost 1 value will be pulled from the Item Details form as it did with previous versions.
2. The Jobs tab of the Estimate Wizard now includes a dropdown lookup field for the Contact Name. This field will display all Sub Contacts that have been entered on the Contacts tab of the Customers form. This will allow users to easily select Sub Contacts that will be the primary contact for a specific job. When selected, the Sub Contact's Phone, Email, and Address information will be filled in automatically based on the details entered on the Sub Contacts tab of the Customers form. This same functionality has been added to the Jobs section of the Customers form and the Customer Info tab located on the Estimates form.
3. The Scheduled Jobs date range filter now includes jobs where the date range selected falls between the Appointment Start Date and End Date. For example, if a multi-day job is scheduled for July 1st through July 5th, when the date range entered on the Scheduled Jobs form is July 3rd, the appointment will be displayed on the Scheduled Jobs form. In previous versions, only appointments that had a Start Date that fell between the Start Date and End Date entered on the Scheduled Jobs form would be displayed. Note that to accomplish this new functionality, the End Time for all appointments listed on the Scheduled Jobs form has been reduced by one minute. For example, instead of an appointment running from 9:00AM – 10:00AM, the appointments displayed on the Scheduled Jobs form will display from 9:00AM – 9:59AM.
4. On the Full Details grid of the Estimates form, there is a new "Show/Hide Not Awarded" link. When selected, any line items that are part of a package that has a Package Status of "Not Awarded" will be hidden from the Full Details grid. There is also a new User Preference that will allow users to set their default show/hide preference. This will eliminate the need to look through line items on an estimate that are no longer part of the project.
5. A new "Scheduled Jobs by Date (Package Total)" report has been added to the Scheduled Jobs form. This report displays the standard Scheduled Jobs information as well as the Estimate Number and Package Total for each appointment scheduled. Note that the permission that is associated with this new report is the "Reports" permission since the report also contains financial information.
6. When the "Update All Unit Quantities" link was selected from the Projected Vs Actual tab of the estimates form or from the Job Costing form, the Auto % Complete value would only be updated on the first record. This issue has now been resolved.

Version 13.2.0 (Previous Version Release)

7. The Estimate Wizard has been enhanced to allow users to easily create Plan Templates and Quick Insert Templates as well as the standard Estimates. From the Estimate Wizard Welcome Screen users will now find three options:
 - a. Create New Estimate
 - b. Create New Plan Template
 - c. Create New Quick-Insert Template
8. Users now have the ability to change the Crew Filter directly from the Report Master {E} form. This will allow users to easily filter data on the Job Sheets reports by Crew without having to go back to the Estimates form.
9. The “Include Misc Costing” checkbox has been added back to the Report Master {E} form. This checkbox was not visible in Version 13.0 or 13.1.
10. Users now have the ability to change the value of the Hide checkbox located on the Full Details grid of the Estimates form for packages that are locked.
11. The grid layout for the Full Details grid located on the Estimates form has been modified to allow users to easily distinguish between the “Standard Rate” column (which comes directly from the Item Details form) and the “Rate” field (which is the current rate used for the calculations on the current estimate. Both fields are available from the field chooser, while the “Rate” field is displayed by default.

Version 13.1.0 (Previous Version Release)

1. The Advanced Costing Wizard now allows Estimate/Invoice data to be filtered by Estimate Date, Estimate Progress Date, Package Date Completed, or Job End Date. This provides additional ways to further drill down into specific data sets when generating costing reports.
2. A new Line Item Totals Costing report group has been added to the Advanced Costing Wizard. This group contains ten new costing reports that display Line Item Revenue, Projected Unit Quantity, Actual Unit Quantity, and the Difference. There are currently ten report grouping options.
3. New Calendar Skins have been added which provides several new theme choices. Skins can now also be saved as a user preference, so each user can have a separate Calendar Skin.
4. An issue that was preventing users from resizing appointments on the calendar has been resolved.

An issue that was causing dropdown lists to now allow scrolling through the list with the keyboard arrow keys has been resolved.

Version 13.0.0 (Previous Version Release)

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

4. **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.
5. **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.
6. **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.**

7. **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.
8. The Estimate List now allows software users to **save and load up to three different custom, user-defined grid layouts**. This feature is especially useful if the user often exports specific data from the grid to Excel or PDF.
9. 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.
10. 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.
11. 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**.
12. 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.
13. 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.
14. The **“Logo and Text #2”** style Header Type has been modified to allow more space for the Company Name.
15. The **M+L Price Style** option located on the Estimate Wizard has been removed, since this is no longer a supported Price Style.
16. **Overall performance has been improved** throughout Allpro Insulator. All development tools have been upgraded and several components were redesigned to improve performance.
17. 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”.
18. 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.
19. 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.
20. 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.
21. 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.

22. 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.
23. 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.
24. 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.
25. 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.
26. 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.
27. 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.

Version 12.0.3 (Previous Version Release)

- 1.** An issue with SchedulePro was causing appointments to not sync properly if an appointment was opened after it was created and before it was synced. This issue has been fixed in this upgrade.
- 2.** The Date Navigator on SchedulePro has been set to fill the entire available area on the screen. This will allow users with larger screen resolutions to see 2-3 months displayed on the Date Navigator.
- 3.** The A/R Center has been updated to filter out invoices that have a balance due of fractions of a penny. Since estimates often have rates that are updated by applying a discount/markup percent or gross profit margin percent, it is possible to have an invoice with a balance that includes a fraction of a cent. When a payment is applied, it is possible to have a balance due of for example: \$0.0012. The current update removes these invoices from the A/R Center grid.
- 4.** The “Update All” functions on the Estimates form and Job Costing form that allow you to automatically update the Actual Material Units and Actual Labor Units has been updated to only update records that are currently displayed in the grid. This allows you to filter the grid to only display specific records (for example by package ID) and then update the Units for the displayed records.

Version 12.0.0 (Previous Version Release)

1. One of the largest additions to Allpro Insulator for V12 is the **Analytics Menu** and its included features, located on the top menu bar of Allpro Insulator. This **new menu** includes the regular Report Manager, All New Dashboard Manager, All New Dashboard Viewer and the All New Advanced Costing Wizard. These 4 features combined allow users of Allpro Insulator to manage data and create functional reports and **stunning visual dashboards** with a few clicks of the mouse. [{Portions are part of the Advanced Features Module}](#)
2. The **All New Dashboards Manager**, Dashboard Viewer and Sales Rep Dashboards are all features that are included in the new Analytics Menu. These features allow users to view and deploy **stunning dashboards** from within Allpro Insulator. Each of the dashboards can be **edited and modified** using the data within your database. For the first time, users of Allpro Insulator have **complete control** of how their data is being displayed in front of them. The Dashboards can be setup and permissioned, so that only specific users can view each dashboard. The Sales Rep Dashboards limits the Dashboards for each specific Sales Rep to only show the data that is specific to them. [{Part of the Advanced Features Module}](#)
3. The **All New Advanced Costing Wizard** is one of the most impressive features added to Allpro Insulator. It allows users to not only view costing reports, but have control over the filtering criteria. The data set that was created for this feature includes all relevant tables, including a combination of Time Sheet and Estimate data for the first time. The ability to create and save the filter criteria allows for users to setup their costing report data exactly the way they want it and continue to print future reports in an **efficient manner**. This feature is powerful and comes with a complete set of 86 all new reports. [{Part of the Advanced Features Module}](#)

4. The **Estimate List** was modified to include **Automation** features, which allows users of Allpro Insulator to update Estimate Progress, Job Status, Job Start, Projected End, End Dates, Estimate Comments, Invoice Comments directly on the Estimate List. This allows for these fields to be updated without having to go into each singular estimate. Each of these fields also has their own separate user permission.
 - A. The ability to change Estimate Comments and Invoice Comments was added to the Estimate List Automation. These fields can now be **updated easier** and in bulk actions and one by one without opening the Estimate Form.
 - B. The ability to change Estimate Progress from the Estimate List has been added to the Estimate List. This has been a **highly-requested feature** and will save users time in having to open each Estimate to change the Estimate Progress.
 - C. The ability to change Job Status has been added to the Estimate List through the Automation Menu.
 - D. The ability to change the Job Start, Job Projected End and Job End Dates has been added to the Estimate List through the Automation Menu.
5. The **Customer List** was modified to include **Automation** features, which allows users of Allpro Insulator to update Job Status, Job Start, Projected End and End Dates directly on the Customer List. This allows for these fields to be updated without having to open the Customers Form. Each of these fields also has their own separate user permission.
 - A. The ability to change Job Status has been added to the Customer List through the Automation Menu.
 - B. The ability to change the Job Start, Job Projected End and Job End Dates has been added to the Customer List through the Automation Menu.
6. The Estimate and Customer List **Automation** Menus also have the options to **Send Batch Emails**, Create Mailing Lists and View those Mailing Lists for future use. Batch Emails will allow for users to send emails to multiple recipients with a **few clicks of the mouse**. Emails Drafts can be created using the Email Drafts form to allow for a quick and easy method of using the Batch Email feature. Users can now filter the lists and send batch emails to customers with ease. Within the Mailing Lists, **mailing labels** can also be printed to send non-email print communications easier.
7. **Due to popular demand**, the Package Renaming has been changed to not automatically occur when modifying the Package ID. The **Package Renaming** now occurs from a right-click action on the Packages Tab of the Estimates Form. The function has also been removed that renames the Package Name when the Package ID is changed.
8. A **Percent Completed** tracking feature has been added to the Line Items, Packages and Estimates within Allpro Insulator. Included in this feature are two columns, one calculated based on the Act Mat Unit Qty entered on the Projected vs. Actual Tab or the Job Costing Form. The other column is a Manual Completion column, which lets you enter Percent Complete values manually that are not connected to any calculated field. The fields are present on the Projected vs. Actual Tab, Packages Tab and Full Details Tab of the Estimates Form as well as the Estimate and Package Lists.

9. The ability for **Field Header Renaming** has been added to all **grids** within Allpro Insulator V12. The ability now exists to **modify column headers** by double-clicking on the text and saving the grid layout. Please note, since the column header changes are made as a grid layout save, during upgrades the column headers will need to be re-saved.
10. In Allpro Insulator V12 we added **14 all new reports**, that include:
 - A. New Job Sheets were added that now include Labor 1 and 2 combined.
 - B. All new **Estimate Change Order** reports have been added to the Estimates Form. One Estimate Change Order has been added that includes the Estimate Detail and one that includes only a Change Order summary.
 - C. All new **Job Purchase Order** forms have been added to Allpro Insulator on the Estimates Form. These reports can be accessed from the Job Sheets menu and make it easier to create simple purchase orders to send to individual suppliers.
 - D. Two reports have been added to the Scheduled Jobs Form. Both reports were created to show the Estimate Total along with the scheduled appointments.
 - E. Three new Item Details reports were added that include all items and item types, to include regular items, sub-assembly items, tiered pricing items and item upgrade items in 1 report.
11. **Multiple report datasets** have been modified and created that will allow for **more custom report options**. This may help users that have had previous custom report requests, however may have incurred an additional cost to create the dataset. For more information regarding custom reports, please call (231) 839-7928. [{Allpro Cloud Services is Required for Custom Reporting}](#)
12. The ability to add **Separate Invoice Comments** to the bottom of each Invoice is now available. On the Company Setup Form, Comments Tab, a new text box has now been added to separate out the Estimate Comments from the Invoice Comments. When an **Invoice** is created, the Invoice Comments from the Company Setup will be inserted instead of the Estimate Comments.
13. The ability now exists within Allpro Insulator to create Estimates and Invoices with **negative numbers** for the Subtotal, Total, Total Due and other Total fields. This ability is present on the Estimates Form, Estimate/Invoice reporting and the **A/R Center**, including reports. Any Customer and Job with a negative value for the Amount Due will show up in the same manner as someone with a positive amount due. This allows for users to keep track of customers that have credits or negative balances on their accounts.
14. The ability to **Send Emails** from Allpro Insulator without having to send an estimate or other report now exists from within Allpro Insulator. This feature allows individuals to send emails to all recipients that are included within Allpro Insulator. This feature will **be helpful** for individuals who do not have another external email client installed on their computer and use Gmail or another web client. The Create Email feature is located on the top menu bar of Allpro Insulator.

15. The ability to select **multiple recipients** when emailing out of Allpro Insulator now exists. In addition to this feature the ability to select a **CC** and a **BCC** were also added. The additional addresses can be added using the simple interface or by typing them in and using semi-colon separation, like that of other emailing programs. As part of this feature, **all email addresses**, from all forms have been added to the grid.
16. The ability to edit the **Line Description** for each line item in the Full Details Tab of the Estimates Form has been added back to the program. In V10 and earlier the option existed as the Description Tab at the bottom of the Estimates Form. This has been changed to a right-click action menu option in V12. When selected, a **pop-up** will open that will allow for easy editing of the Item Description.
17. A **User Attachments** feature has been added to Allpro Insulator V12. This feature allows users to add attachments to the User Attachments tab of their Preferences Form. These attachments can be easily selected when sending email from the program in all Report Master windows.
18. A new **Quick Invoices** feature has been added to Allpro Insulator as part of the **Advanced Features Module**. This feature allows users to **quickly and easily** send out multiple invoices to the same customer or recipient. In many cases, there could be multiple invoices for the same Customer, this allows users to send all of the Invoices to the same Customer at a much faster pace. Users can also select to add a Customer Statement or Past Due Statement to the email along with the related Invoices. [{Part of the Advanced Features Module}](#)
19. The ability now exists to **Manage Payments** directly from the A/R Center form. The need no longer exists to open each singular Invoice to enter payments.
20. The **statuses** on the SchedulePro calendar have changed slightly in the newest version of Allpro Insulator. The statuses are now labeled as “Show time as” within the program and are now only added by the users of the program. No program defaults exist within Allpro Insulator.
21. The ability now exists within Allpro SchedulePro to “**Restore Default State**” of any appointment on the calendar. This can be selected with the right click menu when right-clicked on any appointment that has labels or statuses applied to it.
22. The **tooltips** from within Allpro SchedulePro have now been improved to include **all selectable options** for an appointment within the tooltip. The tooltip has also been modified to stay visible until the user moves away from the appointment. This allows the user to quickly see all appointment data without having to open the appointment dialog form.
23. The **functionality** has been added to **associate employees** with a specific appointment while in Allpro SchedulePro. This feature still exists on the Scheduled Jobs form and has now been added to Allpro SchedulePro. The associated employees are shown on the tool-tip as well as in the Appointment Dialog.

24. The **Add Note D/T Stamp button** is a new feature that has been added to the SchedulePro Appointment Dialog. This link button will add a date and time stamp, including the current User to the Notes section of any opened appointment dialog. This feature can assist with **audit tracking** of individual comments added to the notes section of the appointment dialog. A User and Date/Time tracking has also been added to the Schedule Tab of the Estimates Form.
25. A **Date/Time and User stamp** has been added to each scheduled appointment within Allpro Insulator. The Date/Time and User stamp is visible on the Estimates form, SchedulePro and the Scheduled Jobs Form. This creation date was also added to the tool-tip on each appointment of the calendar in SchedulePro.
26. The ability now exists to **customize** your **Appointment Subject Line** in Allpro Insulator. In the Options Tab of the Company Setup includes a company preference to select a specific Subject format. The options include:
- A. (FL-CJ) Resource First Letter - Customer/Job Name
 - B. (FL-CJ-P-AP) Resource First Letter - Customer/Job Name - Phone - Alt. Phone
 - C. (FL-CJ-Est-P-AP) Resource First Letter - Customer/Job Name Estimate # - Phone - Alt. Phone
 - D. (FL-CJ-Est) Resource First Letter - Customer/Job Name - Estimate #
 - E. (CJ) Customer/Job Name
 - F. (CJ-P-AP) Customer/Job Name - Phone - Alt. Phone
 - G. (CJ-Est-P-A) Customer/Job Name - Estimate # - Phone - Alt. Phone
 - H. (CJ-Est) Customer/Job Name - Estimate #
- This **new feature** works when the appointment is scheduled using the Quick Schedule on the Estimates or Customers Form. Any appointments scheduled from within SchedulePro will keep the same subject formatting as previous versions.
27. The **Fixed Value checkbox** has now been added to the Item Details form. This will allow users to setup which Items will be excluded from calculations when setting up their Items and saving time for individuals estimating. For Items created after the V12 upgrade, the default selected for each item will become the Item default when selected on each specific Estimate.
28. **Support Links** have now been added to more locations in Allpro Insulator and Allpro Cloud Services Sync. A Support link has been added to the login screen of Allpro Insulator. The support links have also been changed to our all new MSP Anywhere platform.
29. The **Job Description** field has now been renamed to Job Location, to match the naming convention within the rest of the program. The field has also been added to the Default Grid Layout for the Estimate, Package and Customer Lists.
30. The **Quick Date** filtering ability has been fully added to the Scheduled Jobs, Estimate List, Package List, Time Sheets, Advanced Job Costing Wizard and Report Master M. Although the Quick Date existed on some of the listed forms, additional selectable options have been added.

31. The **Equipment Form** has been removed from the **Advanced Features Module** and added to the standard version of Allpro Insulator. All users can now access the Equipment Form and add Equipment for selection through-out Allpro Insulator.
32. The ability now exists to select an **Equipment ID** on the **Job Sheet Tab** of the Estimates Form and have it show up on the Job Sheets. Previously, this value would only show up if an appointment was scheduled, the Equipment ID was selected with the appointment and the Job Sheet was opened from the appointment itself.
33. Our **Allpro DSign Service** has been modified to allow for **Percentages** on the Estimate to be applied to options and upgrades that are chosen during the DSign process. Each Percentage which includes the Add Charge checkbox being checked, will be summed together and applied to any accepted option or upgrade. [{Allpro DSign and Allpro Cloud Services is Required}](#)
34. Starting with the **Allpro Insulator V12**, all Allpro Cloud Services communications will now be fully encrypted using a **256-bit SSL** encryption. [{Allpro DSign and/or Allpro Cloud Services is Required}](#)
35. The **right-click option** that allows users of Allpro Insulator to Export to Microsoft Excel or create an Adobe PDF of a specific grid has been added to the rest of the program. This feature now exists for every main form within Allpro Insulator.
36. The **Common Email Provider** settings have been updated based on changes over the past year. The settings for Gmail has the port of 587, for Charter the Authentication is SSL, for GoDaddy the outgoing server is smtpout.secureserver.net and the port is 80, for Yahoo the port is 587.
37. A **warning window** has been added to Allpro Insulator on the Estimates Form, Full Details grid when a user inputs an Item without an Item ID. This warning is intended to let the user know that entering Items without Item IDs is not the intended method for Item entry and can cause unintended issues.
38. An **Architect Form** has been added to Allpro Insulator. This form allows users of the program to keep track of specific Architects for each specific Customer and each specific Job. The Architect field is a drop-down field that is accessible on each **Customer and Job** selection area of the program. The values from the drop-down fields are filled in based on the entries entered into the Architect Form of Allpro Insulator.
39. A **prompt** has been added so that when Line Items on the Estimates Form are copied using the CD button, a prompt will ask if any associated **Line Notes** should also be copied. This feature was added by request to save time while copying line items, so that all notes can also be copied to any additionally created line items.
40. A **new feature** has been added to allow multiple company/database users to **switch between companies/databases** easier than ever before! Users can now select the Switch User/Database to easily jump between companies, databases or even different Users within the same Company. A prompt was added to this feature to inform users that all tabs and forms will need to be closed and saved prior to switching. [{Additional Purchase Necessary for Managing Multiple Databases}](#)

41. A **Unit Rounding** option has been added to the Projected Unit Quantities within Allpro Insulator. A Unit Rounding field has been added to the Item Details form. This allows users of Allpro Insulator to specify which items need to be rounded to what value when calculating **Projected Units** in the program. The rounding can range to the nearest whole number to the seventh decimal place. It is important to understand that although this changes the rounding within the program for each specific line item, the changes are not passed to the reporting. If changes need to be made, a custom report will be required.

User Permission Changes and Additions

1. The ability to set permissions for each of the Estimate List Automation features has been added to the Software Users Form. No Access and Read Only will not allow the user to access these features.
2. The ability to set a permission for changing the Package Status on the Packages Tab of the Estimates Form has been added. When set to Read/Write, the user will be able to change the Package Status. When the permission is set to No Access, the user will not be able to change the Package Status.
3. The ability to set a permission for changing the Estimate Number on the Estimates Form. When set to Read/Write, the user will be able to change the Estimate Number. When the permission is set to No Access, the user will not be able to change the Estimate Number.
4. A Rename Job permission has been added to the Software Users form. This permission controls whether a user can rename a specific job on the Customers Form of Allpro Insulator. When the permission is set to No Access or Read Only, the user will not be able to rename the job.
5. The ability to set permissions to allow Read/Write, Read Only, or No Access for the Advanced Costing Wizard has been added.
6. The ability to set permissions to allow Read/Write, Read Only, or No Access for the Sales Rep Dashboard has been added.
7. The ability to set permissions to allow Read/Write, Read Only, or No Access for the Dashboard Viewer, Dashboard Designer, and Dashboard Manager has been added.

Bug Fixes

1. The issue has now been fixed that causes a Red X to appear across the Estimates Form when closing the form. This issue, in some cases would also cause the Estimates Form to be inaccessible once the issue occurred, until Allpro Insulator was restarted. This issue has been remedied.
2. The bug was fixed that caused the User Calendar to re-appear after the calendars in SchedulePro are refreshed, either from accessing the Manage Resources grid or hitting Refresh on the menu bar. When the Disable User Calendar is checked on the User Preferences Form, the User Calendar will not appear when refreshed.
3. The bug was also fixed for the calendar that would not keep User Preference settings for Default Calendar View and Groupings after the refresh button was pressed. The User Preference settings are now set correctly.
4. A bug was fixed that caused the Difference field in the Projected vs Actual Tab on the Estimates Form to not update properly. This has also been fixed on the Job Costing Form.
5. The bug is now fixed that caused the renaming of the Package ID on the Estimates Form when creating new Packages or Line items within Allpro Insulator.
6. The Design list will no longer allow for the deleting of individual records while the form permission is set to Read Only.
7. The Allpro Insulator Backup/Restore function which is located in the Data menu of Allpro Insulator did not work on any version where the database was being managed using SQL Server 2014. The feature to easily backup databases no longer exists in SQL Server 2014 and above and has now been removed from Allpro Insulator. We recommend utilizing our Allpro Cloud Services as a backup option or purchasing a 3rd party backup option that can backup attached SQL Server databases.
8. The issue is now fixed that caused Invoices that were created with the Produce Invoice feature to not automatically calculate the due date based on the terms for the Estimate. When an Invoice is created using any of the methods from within Allpro Insulator, the due date will automatically be filled in.
9. The Crew 1 and Crew 2 dropdown lists have now been fixed on the Sub-Assembly and Upgrade lower grids, located on the Item Details form. In V11, the dropdowns could not be selected and therefore, no selection could be made.
10. The issue existed in the past where negative numbers could not be stored within the database for Estimate values and totals. This issue has been fixed.
11. Although this is not a conventional bug, an error message has now been added to Allpro Insulator to let users know about the parameter restrictions for exporting reports within Allpro Insulator.
12. The issue has now been fixed on the Terms Tab of the Company Setup that would cause individual terms entered to not be saved, if only one term was being entered.

13. Recurring appointments can cause issues with appointments within Allpro SchedulePro. They are not intended to be used fully with the Customer/Job and other features that have been added in our current calendar configurations. Due to these issues, we have blocked the ability to create recurring appointments when the Customer/Job field is selected. Recurring appointments can only be made for appointments with only a subject present and no Customer/Job.
14. The issue has now been fixed to show records within the Email Drafts form without assistance from Allpro Technology. The records in the Email Drafts form will now show up in the Email Drafts form and can be used to create Email Drafts for use within Allpro Insulator, for more information on Email Drafts, [click here](#).
15. The issue has now been fixed that would not send the Round Package Record to QuickBooks as needed. The Round Package Item will now move to QuickBooks when Estimates or Invoices are moved over.
16. An error was removed on the Report Master M when trying to directly print any report that passes parameters to the report. Any report that has date groupings or specific category groupings has to pass parameters to the report in order to display the correct information. This has to occur as the report is being displayed, thus the report must be viewed and then printed or exported. A message box will now appear on any report where the parameters are being passed.
17. During Item or Product creation within Allpro Insulator, if a blank row containing ****ENTER ID**** is created and then duplicated, it will cause an infinite loop, forcing the user to close the program. This issue has been fixed by outputting the time unit of milliseconds to the end of the ****ENTER ID**** field. This will stop any individual from creating this infinite loop scenario.
18. The bug has been fixed that caused a .NET error when users entered a non-integer into the Target Profit Margin or Actual Material Unit Quantity fields. Although users are still not able to enter non-integers, a message box will appear, letting the user know that this is not allowed.
19. The V12 Allpro Insulator Database has been modified to identify between companies/databases in every form and procedure. In previous versions, some of the forms were not completely setup to separate out the DFID field that separates records from within the database.

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. We were able to put a great deal of time and money into Allpro Insulator Version 12. Our staff spent over four 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 of these new features should help make your business more profitable and productive.

Version 11.1.0 (Previous Version Release)

- 1.** Dashboard, Costing, Product Category Costing and Profit Analysis Reports in Allpro Insulator can now be filtered by the “Date Completed” for each singular package. This will allow for more extensive package sales tracking and sales tracking over periods of time for the same Estimate.
- 2.** Reports have been added to Allpro Insulator that filter by Package Name and Package ID. The reports can be found in the Dashboard, Costing, Product Category Costing and Profit Analysis groupings.
- 3.** New reports have been added that highlight Inventory Statuses. These reports will require the usage of the Minimum Qty on Hand column in the Product Details Form.
- 4.** New Costing Reports have been added to the Estimates Form that allows users to view costing by Product ID for projected and actual entries.
- 5.** New Customer Details reports have been added that highlight the Top and Bottom 10 Jobs for each Customer.
- 6.** All Estimates and Invoices have been modified to remove the duplicate Contact Name entry, only when the Customer/Job Name are the same as the Contact Name. If the Contact Name is different, the name will be displayed, if the Contact Name is the same as the Customer/Job name, the Contact name will be suppressed from the report.
- 7.** A Costing report has been added to the Estimates form that compares the costing of an Estimate to a PO Amount applied to the Packages of the Estimate. This report allows users to view costing as it compares to the PO/Settled Amount.
- 8.** The Scheduled Jobs Reports have been modified to show the Date/Time rather than only the Time.
- 9.** The Estimate List Reports have been modified to show amounts exceeding \$100,000.
- 10.** In previous versions, Sub Assembly Line Items that contained Line Item Upgrades did not display on the Estimate report. This issue has been corrected in version 11.1.0.
- 11.** A link has been added to the Last Sync record on the login screen of Allpro Insulator. This is intended to help users of Allpro Insulator understand what the Last Sync value represents.
- 12.** Dashboard Report counts were modified to show a distinct count. The distinct count will show a better representation of the data within Allpro Insulator.
- 13.** The “Remove Crew Filter” and “Remove Package ID Filter” checkboxes were not present when accessing Job Sheets from the Scheduled Jobs Form. This has been corrected and the filters can now be removed for crew and package when Job Sheets are printed from Allpro Insulator.
- 14.** The “Update All Unit Quantities” option on the Projected vs Actual Tab of the Estimates Form and in Payroll Splits will now update the Difference column when used for all rows. In version 11.0.0, the Difference column was only updated for the active, highlighted row.
- 15.** The Estimates and Invoices in Allpro Insulator began printing the Package Name in lower case, regardless of the case of the Package Name on the Packages Tab of the Estimates Form. This has been fixed and all Package Names will now appear in upper case, as do the Package IDs and Names.
- 16.** A bug was fixed that allowed records in the A/R Center to not be removed from the list after being paid. This was due to the rounding of 4 decimal places and the record in the database still showed a Total Due of less than 0.01 and was not visible.
- 17.** It is no longer possible to create duplicate Zip Codes via Company Setup or in the Add Customer/Job Forms within Allpro Insulator. The duplicate Zip Code entries could cause issues with selecting future Zip Codes.
- 18.** The ability now exists to include all Closed and Not Awarded Jobs when viewing reports in the Customer List.
- 19.** The Discount/Markup field on the Customers Forms will no longer error when no value is entered into the field. If no value is entered, a value of 0.00 will become present in the field.

Version 11.0.0 (Previous Version Release)

42. The **Scheduled Jobs Form** has been completely re-done. We removed the Master Job Sheets functionality and created a more **functional design** for mass printing Job Sheets that is based on the currently filtered and selected data. Our new Quick Sheets feature will allow schedulers and individuals printing Job Sheets to print Job Sheets for a given period, **quickly and effectively**. In addition to this functionality, Job to Job to Job Map printing has been added to the form as well as date stamp indication when the Job Sheet is in fact produced from the Scheduled Jobs Form, which is also present from the SchedulePro form when needed. The specific calendar resource is now present on the Scheduled Jobs Form and is updated when the data in SchedulePro is changed. *{Portions are Part of the Advanced Features Module}*
43. The ability now exists in Allpro Insulator to **Apply a Profit Margin by Package**. On the Packages Tab of the Estimates Form, the same functionality now exists that is present on the Full Details Tab for performing Profit Margin changes. The changes are also monitored in the Price Manipulation Log as described below.
44. A new Email Drafts feature has been added to Allpro Insulator. This feature will allow **automatic or prompted emails** to be sent out based on specific triggers in the program. An example of this is an email sent out to the customer and sales rep each time their job is scheduled. Customization exists to allow the sales rep to receive one email and the customer to receive a completely different email with specific instructions. On a smaller scale, the same drafts used when sending automatic emails can be used as more advanced templates to send emails with customer subjects and bodies. This will allow users to have a specific subject and body for any type of email they are sending out. A log has also been created to keep track of all emails sent, in addition to the printing and exporting of reports. *{Part of the Advanced Features Module}*
45. A new **Price Manipulation Log** has been added to the Estimates Form of Allpro Insulator. This log will keep track of changes to the pricing by using a Discount/Markup Percent, applying a Target Profit Margin, applying a Package Profit Margin, applying a P.O. Adjustment and performing a Custom Discount Percent. The PM Log is located in the lower tab group, last tab, and shows all of the information needed to determine what major price adjustments were applied to the Estimate. In addition, the Price Manipulation, Estimate Progress, QB Connectivity, and Print/Export/Email Logs have been consolidated in the Activity Log Form, which is accessible from the Data Menu at the top of Allpro Insulator. When selected from the Data Menu, the Price Manipulation Log can be viewed to show price manipulations from all Estimates.
46. A **Quick Notes** feature has been added to Allpro Insulator which allows users to create notes singularly for the Customer, Job and the Estimate. The Quick Notes functions is a separate form and is linked to the records from which it was opened. If it was opened on the Customers Form, it will show relevant information for the current customer. The ability to view the Quick Notes for a specific Customer, Job, and Estimate has been added to every form and right click menu, where applicable. In addition to writing simple notes, pictures and other documents can be added as attachments and a Rich Text Editor was added to allow note formatting.

47. A **Customer Specific message** can also be attached to the bottom of each estimate by selecting “Show on Estimate” for any Quick Notes Entry. A grid is now present at the bottom of the Estimates Form that will display any Quick Note with that specific Note Category. This will allow users to flag Sales Reps and Users to a specific Customer message or issue.
48. **Line Item Upgrades** have been updated in Allpro Insulator V11 and the pricing will now automatically update as pricing changes are made. Line Item Upgrades will now update automatically when Standard & Custom Discount/Markups percentages, Package Purchase Order Changes and when the new Package Profit Margin feature is used. In addition to the above updates, Line Item Upgrades work more efficiently with Sub-Assemblies. When a Sub-Assembly is now replaced by the Item upgrade, it will now remove the Main Items’ Sub-Assemblies as needed and replace with the Upgrade Item. If the Upgrade Item has Sub-Assemblies, it will add them as needed. Lastly, but definitely not least, Line Item Upgrades can now be setup in Item Details to be used automatically any time a specific Main Item is selected. The adding of Line Item Upgrades setup will work in the same way as Sub-Assemblies or Tiered Pricing and will allow Users of Allpro Insulator to ensure **upgrades are always being offered!**
49. A HUGE FOCUS for the Version 11 upgrade was to **increase the user’s productivity**. We have made several enhancements throughout Allpro Insulator that simplify common tasks. These range from reducing keystrokes for common tasks to adding shortcut menus to almost all grids. We have also made it much easier to access related data on other forms via quick shortcut menus.
50. In Allpro Insulator V11 we **updated over 30 reports and added over 20 new reports**.
- The Job Sheets have all been updated to include Scheduled Start and End Dates, Resource, Package ID, Equipment ID and C/E User, Job Contact Name and Phone Number.
 - 5 more Job Sheets were created that have the Product Source located on the bottom of the Job Sheet, which allows any Job Sheet to have Load Sheet information directly on it.
 - 4 new Estimates and Invoices have been added with a new enlarged letterhead area, allowing for greater header customization.
 - New Invoices were created with a new footer design, which re-structured the payments and tax areas.
 - Product pricing information was added to the Warehouse Inventory Reports along with the Product Description to assist with identifying the Products without Product ID knowledge.
 - Graphs were added to profit and sales reports to allow users to better visualize the data.
 - 2 new Profits by Customer Reports were added to Allpro Insulator that layout the data based on Top 10 Customer performers in the specific categories.
 - Sales reports filtered by Job Type have been added to the Sales Reports.
 - Item Usage reports have been added that will allow users to view Item Totals for a period grouped in various ways.
10. An option has been added to the **right-click menu** of the Estimates Form – Full Details Grid which will allow individuals to **View Related Records** for the currently selected line item. This will show all associated sub-

assemblies, upgrades, and line notes for the specific line item. A new window will open that color codes each specific category, allowing for a clear viewpoint of the item, which can be very helpful on more complex bids. This grid is not editable and is meant for viewing and reference only.

11. A New Window will now appear when **Deleting Sub-Assemblies** on the Estimate Form. The Window is similar to the window described for viewing related items and will allow the individual to view every sub-assembly, upgrade, and line note associated with a specific line item. This will allow the user to **more effectively** understand what they are deleting and not leave extra sub-assemblies on the Full Details Grid
12. An Estimate / Job / Customer Archive function has been added to Allpro Insulator. This feature allows users to **archive old customers, jobs, and estimates** so they will no longer be included in any list or report. Archiving old customers, jobs, and estimates will improve software performance and remove clutter from the Estimate List and Customer List. Every archived customer, job, and estimate can be recovered, and the customer can only be archived if all jobs are archived. These new features are added to the Estimate List and Customer List, which allows for exact filtering, in order to specifically choose the valid records. A specific example would be, filtering for the Job Status of "Not Awarded" in order to remove the estimates in the system that were not awarded. *{Part of the Advanced Features Module}*
13. A **Quick Insert Plan ID** Function has been added to Allpro Insulator which will allow users to create a Quick Insert Template, in much of the same way as a Plan Template is currently created. The added functionality of the Quick Insert Template allows users to have specific Quick Insert Templates that automatically get entered into any newly created Estimates. If a specific Quick Insert Plan Template will not apply for an Estimate it can be un-selected in the Estimate Wizard. The Quick Insert Plan ID will work great **to create automatic item insertion** within Allpro Insulator. If certain items are always added to an Estimate, they can now be added each time an Estimate is created and no one can forget them!
14. A **Comments field** was added to the Multi-Day Splits Grid on the Job Costing Form. The newly added field can also be viewed on the Multi-Day Splits Tab of the Payroll Splits Form.
15. A **Product Location field** has been added to the Product Details Form. This will also be viewable from the Product Inventory Form and can be used to track inventory location within a warehouse. The field will also be available as a grouping for future Custom Reports.
16. A **Warehouse Location field** was added to the Product Details Form. This field will also be viewable from the Product Inventory Form and can be used to track inventory in multiple warehouse locations. This field is for reference and does not have any ties to other features in the program, however, will be very useful for multiple location warehouses. The field will also be available as a grouping for future Custom Reports.
17. A **Manufacturer SKU and Supplier SKU fields** have been added to the Product Details Form and the Product Inventory Form. These fields will be to enter the Manufacturer or Supplier SKUs for the products, without having to integrate the SKU into the Product ID. This should allow for a more efficient design and cross between the warehouses and ordering departments.

18. A **Inventory Dollars field** has been added to the Inventory Balances reports for Warehouse Inventory. The column Inv Cost was added to the reports for each Product ID and an Inventory Cost Summary was created which includes Actual Inventory Total, Average Unit Cost, and Inventory Total Cost.
19. A **Minimum Qty On Hand** field was added to the Product Details Form. A minimum inventory value can now be added to the Product Details Form and the value will be represented on the Product Inventory Form. An Inventory Status Column was added and uses a color indication system to let users know where a **specific products' level** is at. The indicator of Good (Color=Green) represents a product where the current inventory is above the Minimum Qty On Hand. The indicator of Act Low (Color=Red) represents a product where the current inventory is below the Minimum Qty On Hand. The indicator of Pro Low (Color=Yellow) represents a product where the current projected (scheduled) inventory will put the inventory level below the Minimum Qty. On Hand. The field will also be available for future Custom Reports.
20. Jobs will now be removed from the Active Jobs list when the Job Status is changed to **Not Awarded**. The jobs will still be available for viewing when All Jobs is selected as a filtering option.
21. The **Export to PDF and Microsoft Excel** features have been added to the Estimate List, Employees Form, Customer List, Product Details, and many more.
22. The **Notes Panel** on the Product Details Page was made smaller. This will allow individuals with smaller screen sizes or resolutions to view more of the Product Details grid.
23. The **tabbing on the Estimate Wizard** was improved to allow individuals creating an Estimate to have a more fluid keyboard control. The specific focus of the changes was on the Create New Customer and Create New Job sections.
24. **Signatures** can now be removed from the Company Setup, Signature Tab. In prior versions, once a signature was loaded into the program, the signature would be present in the preview window until another signature replaces it. Individuals can now delete the record and refresh the preview window.
25. **Spell Check** has been added to the **Item and Product Details Forms** through the right click menu options. The spell check will check each Item and Product Description and can't be stopped until all records are checked. During the spell check common insulation specific words can be added to the dictionary, i.e. R-19, Item IDs and other common terms. Spell Check can now be utilized through a right click menu option and can be enabled or disabled as an automatic option. The Spell Check can also be utilized to check all created Notes on the Item Details Form.
26. **Spell Check** has been changed on the **Estimates Form**. In previous versions of Allpro Insulator the Spell Check has been utilized through a Tab on the bottom of the Estimates Form. Spell Check can now be utilized through a right click menu option and can be enabled or disabled as an automatic option. Incorrectly spelled words will be underlined in Red, similar to Microsoft Word and other software programs. The Spell Check of all Estimate Descriptions can be forced by selecting an option in the right click menu.
27. The **Check All Records** option was removed from the Item Details Form, Update \$ Utility. The removal of the option should eliminate accidental updating of non-displayed, but still checked records. It is important to understand, if

Check All Displayed Records is selected and the filter is narrowed further, the records that are not displayed and still checked will still be updated.

28. In the Item Details, Update \$ Utility, two fields have been added in order to simplify saving functions. In previous versions, only a single link existed and it was possible to leave the utility without saving changes. Now **“Done/Save Changes”** and **“Done/CANCEL Changes”** have been added to the utility and work the same as the Product Details Utility Options.
29. A **Default Markup/Discount Percent** can now be tied to each **Sales Rep** in the Sales Reps Form. When an estimate is newly created using the Estimates Form or the Estimate Wizard, the Default Markup/Discount Percent will be automatically applied. If the selected Customer currently has a default percentage, the Customer percent will override the Sales Reps default percent.
30. **Package Rounding Records** have now been removed from the Projected vs. Actual Tab, Job Costing Form, Payroll Splits Form, Job Sheets and the Costing Sheets. Going forward we will continue to look for instances where the Package Rounding Records do not belong and remove them from reports.
31. The **Package Rounding Record** has also been removed from the Item ID dropdown list on the Estimates Form, a filter was created to remove the Line Item. This should limit individuals from adding or editing the record.
32. On the Customers Form, the **“Locked...Click here for details”** links have been updated to remove the Unlock references and now inform the user to “Edit” the Customer or Job. Locking a Customer is no longer an option, however, you must use the QB Menu on the Customers Form to Edit the Job or Customer after it has been sent to QuickBooks.
33. **Spinner buttons** have been added through-out the entire program to allow for **easier date selection**. Spinner buttons allow the user to move up or down by a specific increment in a cell and will allow for much easier selection of dates and times within Allpro Insulator.
34. The **PO Adjustment amount** has been modified to correctly show negative and positive adjustments. This was changed to give a clearer representation of changes to the Package Totals. When the Package Total is increased, the PO Adjustment amount will be positive and when it is decreased, it will be represented by a negative value.
35. The **Reset button** has been removed from the Target Profit Margin field on the Estimates Form. The field was removed to create a more uniform price changing format through-out the entire program. If an individual wants to reset pricing to the original amount, a discount percent of 0 can be applied or the Update Prices / Cost Feature can be used.
36. A **Date of Birth field** has been added to the Employees Form. The field will also be available as a field for future Custom Reports.
37. More in-depth duplication verification has been added for the creation of Jobs and Customers in Allpro Insulator. We have now added letter case checking to the Customers Form and the Estimate Wizard. This should **minimize the creation of duplicate Jobs and Customers** within the program. In addition a duplicate verification has been added

to the Estimate, when someone presses the Delete button. If duplicate jobs exist for the Customer/Estimate, it will inform the user that deleting the Estimate may cause problems and that a duplicate Estimate may not exist.

38. SchedulePro will now allow you to select a **default printer** that will be used for Calendar printing only. This will allow users to print calendars with color labels present. The default printer can be changed in the Default Calendar Options Menu.
39. SchedulePro will now remember the **print settings** that are entered into Default Calendar Options. In earlier versions these were saved and the functionality was lost in the last two versions.
40. SchedulePro now has the ability to **save calendar layouts** in a similar way to the saving of grid layouts in Allpro Insulator. The new menu options were added to the Tools menu in SchedulePro to allow the user to save, load, or restore the calendar layout. If a layout is currently selected in User Preferences, the User Preference will be chosen over the saved layout.
41. In addition to the changes to the SchedulePro Defaults, **the views have been modified** to include Day, 5 Day Week, 7 Day Week, Week, Month, Timeline, and *Gantt*. Each of these views can be saved as the default layout option and can be viewed on the User Dashboard.
42. A Preference has been added that allows administrators to determine which fields are available for selection when creating an appointment in SchedulePro or on the Quick Schedule Tab of the Estimates Form. The **“Calendar Display Fields”** preference has been added and can be changed by checking the boxes of the desired fields.
43. When appointments are moved between resources in SchedulePro, **the first letter in the appointment**, which indicates the resource, will now change as the appointment is moved. This will keep the appointment subject up to date as it is moved throughout the resources.
44. Functionality has been added that renames packages when the Package ID changes. In previous versions, when the Package ID was changed, users had to go into Full Details and change the Package ID manually for each line item. When the Package ID is changed, now the line items, line notes, and upgrades will also change to the **new Package ID automatically**.
45. A new button has been added to the **Report Masters’** that reads, “Click Here to view details about the currently selected report.” This button will allow users to view details specific to each report in Allpro Insulator and get a better understanding of where the information in each report is coming from.
46. The ability to **associate Jobs to Follow-Up Calls** has now been added to Allpro Insulator. The column Job Name has now been added to the Follow-Up Calls form, this will allow users to select a Customer as was done in previous version and specify a more job name if needed.
47. A function has been added to the **Software Users** form so that the user can update a specific permission for all Allpro Insulator users at once. When entering the User Wizard, press the **“Edit All Users Permissions”** button and you will then be able to see all of the user permissions on the screen for all users at the same time. This should allow for an easy time when mass updating permissions.

48. A new ability to add a **Sales Rep Signature** on the Preferences has been added in Allpro Insulator V11. Each User will have to be appropriately tied to a Sales Rep in order for this feature to work within the program. Located in the User Preferences Form is a new tab called "Sales Rep Signature". This tab will indicate the current sales rep that is associated with the current user and give the individual the same dialog that is present in the Company Setup for uploading a signature. The image measurements are identical to those for the Global Company Setup Signature and the Company Setup Signature entry will be omitted if a Sales Rep Signature is present.
49. The ability to display a **Map to the Job** has been added in the **SchedulePro Form**, the Estimate List Form and the Scheduled Jobs Form. Located in the Scheduled Jobs Form is an additional feature that allows individuals to print maps from a location to multiple jobs and back to the home location.
50. For **personal email security**, a password mask has been added to the User Preferences Form of the Estimates Form. Now "*****" will be displayed in lieu of the current password.
51. **Security at the Login** for Allpro Insulator has been added in order to limit the amount of attempts at login. If the login attempts are hit, the program will exit.
52. References to the **M+L Price Style have been removed** from Allpro Insulator due to inactivity and to clean up the overall presentation. The fields have been left on the Item Details and Estimates Form in case current information exists in the fields.
53. **Copy and Paste** functionality has been added to the Estimates Form, Item Details, and Product Details Forms. This includes the ability to paste line items from one estimate to another with ease. This feature will be running in Allpro Insulator as a BETA function. **For advanced users only!** We will be testing with customers the usage of this feature and its ability to be in the program in the future.
54. The ability to **quickly update** all of the Items in **Job Costing** to equal Projected or Actual Material automatically. This is the equivalent to hitting the =P and =M button for each singular line item. For individuals that equal all of their Labor Quantity equal to Projected, this will save time for each Job Costing performed.
55. On the Current **Follow-up Calls Tile** on the User Dashboard, the ability to view all past calls has been added as a Right-Click Menu Option. This functionality will allow Users to quickly view past Follow-up Calls directly from the User Dashboard.
56. A new **Revision Date Preference** has been added to User Preferences, which allows Users to determine if they would like the Revision Date of an Estimate to be the Original Estimate Date by default or use the Current Date, when selected.
57. A User Preference has now been added to **hide the subtotal** on a printed Estimate by default. The preference is called "Hide Est/Inv. Subtotal by Default" and is a simple checkbox.
58. In V11, the **Job Status of "Not Awarded"** will now be removed from the Active Jobs filtering in the Customer List and Job List. To view a "Closed" or "Not Awarded" job, simply select All Jobs.
59. In V11, the **Plan Template** Insert Dialog has been modified so that users can **insert duplicate packages** from the same Plan template into an Estimate multiple times.

Bug Fixes

20. A bug was fixed that allowed the splash screen to stay open, not allowing data to be saved properly or in certain instances stay open when the form was closed.
21. The edit dropdown button was re-formatted for the Instructions Field on the Special Instructions Grid on Job Sheets Tab of the Estimates form. This will better inform individuals that this dropdown is editable.
22. On the Suppliers, Manufacturers, and Equipment Forms, blank records will no longer be created. If blank records in these forms already exist, delete them and no new records will be created.
23. On the Estimate Wizard, the tabs were fixed to not allow users to tab into hidden fields. At the same time, tabbing was improved in the Estimate Wizard to allow for more fluid Estimate entry.
24. Individuals will no longer be able to replace an item on the Estimates Form with a blank Line Item Upgrades record. A message box will not be displayed informing the individual that an Item ID must be selected.
25. Package Rounding is now included in the tax/percentages calculations.
26. The Done/Cancel Changes button for the Update Utility on the Product Details Form has been fixed and will no longer save changes when pressed while performing an update and Maintaining a Profit Margin.
27. The Terms dropdown on the Estimate Wizard was not linked to the QuickBooks Terms in the QuickBooks version of Allpro Insulator. The dropdown is now properly linked with the verified QuickBooks Terms.
28. In V10 when you enter the Discount Markup Method field of the Company Setup – Options Tab you were not able to leave the field until a Method is selected. In V11 a prompt will display letting the individual know that a Method must be selected.
29. The Package ID Dropdown was updated to show only the current Estimate. This only occurred when selected between different Estimates.
30. When creating a Quick Schedule on the Estimates Form – Schedule Tab, if the total characters of the subject reached 100 characters in previous versions, an error would occur. In V11 the subject will now be trimmed and the Schedule entry will be created correctly, minus the trimmed subject characters.
31. When an Invoice is produced, it now will include the percentages from the initial Estimate.
32. When a Job is Closed, the Customer / Job Tab of the Estimates Form would show blank and the Customer / Job would not be located in the Dropdown List on the Estimates Form Status Bar. This issue has been resolved and the Customer / Job Tab will now populate regardless of the Job Status. It should also be noted that “Not Awarded” has been also excluded from the lists, starting with V11.
33. The Import/Update Products function was not functional and has been removed from the Product Details form due to inactivity.
34. In previous versions a negative value could be entered into the Discount/Markup box on the Estimates Form, in V10 you could not and now this has been fixed and negative values can now be entered again.

35. The "1" and "." were removed from the appointment records when the job was scheduled from the Schedule Tab on the Estimates Form.
36. The \$10 and \$100 Package Rounding Items were adding value even when the rounding amount was zero. This has been fixed and when the rounding amount is zero, no Package Rounding value will be added to the Package.
37. It was found that when you update a main item, the upgrade items were not updated with the appropriate changes. This is now fixed for all price changes.
38. A bug was fixed that caused the signature image to load into the letterhead/log position within the Company Setup. Although, the signature image would correctly display on the Estimate, this was fixed to avoid confusion.

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!

Version 10.3.5 (Previous Version Release)

1. An issue that could cause some fields on the estimates form to not update automatically has been corrected.
2. An issue that could cause an error message to display when applying a Discount/Markup Percent to an estimate that contained blank records has been corrected.
3. An issue that could cause the Estimate Subtotal and Estimate total to differ by 1 cent has been corrected.
4. If all of the line items for a specific package have been deleted, the associated Rounding Record will now also automatically be deleted.
5. Other minor related bug fixes have also been completed.

Version 10.3.3 (Previous Version Release)

1. A new Progress Changed Comments field has been added to the Estimates form. When a user changes the Progress, a prompt will be displayed allowing the user to enter comments (up to 200 characters) about the current Progress Change. Those comments will be stored on the Progress Log which is accessible from the Action menu. This will provide users with additional details about any progress changes that are made as the job progresses.
2. A new Discount/Markup Method has been added to the Options tab of the Company Setup form. The Price Method allows the user to determine whether the Sales Price or Total Cost will be Multiplied or Divided by the Discount/Markup Percent entered. This enhancement has been added to provide additional pricing methods for customers who are accustomed to using these pricing methods. This feature is not intended for existing customers who are currently using the multiplication method.
 - a. In previous versions, when using the Discount Price Style, the Sales Price would be multiplied by the Discount/Markup Percent entered. This method still applies when selecting "Multiplication" as the Discount/Markup Method. Alternatively, if a user selects "Division" as the Discount/Markup Method, the Sales Price will be divided by the Discount/Markup Percent entered.
 - b. In previous versions, when using the Markup Price Style, the Total Cost would be multiplied by the Discount/Markup Percent entered. This method still applies when selecting "Multiplication" as the Discount/Markup Method. Alternatively, if a user selects "Division" as the Discount/Markup Method, the Total Cost will be divided by the Discount/Markup Percent entered.
3. In version 10.3.1, the Margins grid did not always fully update to show the details for all packages. This issue has been corrected in the latest release.
4. In previous version, if a user were to create a new customer with the same name as an existing job, a prompt would be displayed informing the user that there is already a customer with this name. In the latest version, users can create new customers with the same name as existing jobs.
5. In previous versions, if a user were to attempt to manually set the Material Cost for an Item on the Product Details form which did not already contain any financial data, the Material Cost would not be set. This issue has been corrected in the latest release.
6. In previous version, when a user created a new customer on the Customers form, the Sub Contacts and other related tabs would not always update to show the new customer's data. This issue has been corrected in the latest release.

Version 10.3.1 (Previous Version Release)

1. In version 10.3.0, when an estimate was sent to QuickBooks, the new RoundPackage item would not carry over to QuickBooks. This caused the estimate total between Allpro Insulator and QuickBooks to be slightly different. This issue has been resolved in the latest release.
2. In version 10.3.0, if no Package Rounding options was selected, the Package Total displayed on the Packages grid would not be updated correctly. This issue has been resolved.
3. Google changed their mapping function recently which caused our Google Maps integration to fail. Allpro Insulator has been updated to be compatible with Google's new mapping method.
4. The "Set Allpro Terms to Match QuickBooks Terms" button has been removed from the Company Setup form as this function is no longer needed.

NOTE: See below for additional upgrade details.

Version 10.3.0 (Previous Version Release)

1. Our Allpro Insulator **Crew Edition** has been completely redesigned for the latest release. [Click here](#) to view the new Allpro Insulator Crew Edition video.
2. A new **CE User** field has been added to the Create Appointment dialog located on the SchedulePro form. This field can be used to associate the appointment with a crew foreman. When the crew foreman logs into Allpro Insulator Crew Edition, they will only have access to their scheduled appointments.
3. A new **"Use Tablet Mode"** checkbox has been added to the Connection screen located on the Login form. When checked, the grids associated with the Crew Edition will have an increased row height. This will make it easier for tablet users to select a row or cell.
4. A new **Package Rounding function** has been added to Allpro Insulator. Administrator can now set a default package rounding value on the Options tab of the Company Setup form. The rounding options include:
 - a. "No Rounding" which will not round the package (\$1,235.67).
 - b. "Round \$1" which will round the package up to the nearest dollar removing anything after the decimal place (\$1,236.00).
 - c. "Round \$10" which will round the package up to the nearest \$10 value (\$1,240.00).
 - d. "Round \$100" which will round the package up to the nearest \$100 value (\$1,300.00).

When a user creates a new estimate, the default package rounding value will automatically be set. The user also has the ability to change the package rounding type on each estimate. This can be done by setting the desired value on the Estimate Details grid located on the top of the Estimates form. As the user enters or adjust any values, the package rounding value will automatically be updated so the overall package total matches your package rounding setting. This will allow users to automatically round package totals without manually adjusting any values.

5. A new **"Show/Hide Rounding Records"** link has been added to the top of the Full Details grid. Users can select this link to show or hide the rounding records in the Full Details grid. When selected, the Rounding Records will be displayed or hidden until the user selects the link again or until Allpro Insulator is reopened. This allows the user to hide the records if desired, and they will remain hidden when opening any different estimates throughout the day. Note that the same functionality has been added for showing or hiding the Sub Assembly Item records.
6. In previous versions, the **Job Phone Number, Job Alt Phone Number, Job Fax Number, and Job Email Address** were always set to match the values set for the customer when the job was created. In previous versions, there was not a way to change the job contact information after the job was created. Users were also not able to set separate values for each job. This has been changed in the latest version release. The Job Information section now contains fields for all contact information. By default, the values will be set to match the Customer information. After the job has been created, the values can be changed if needed.
7. A new **User Profile grid** has been added to the Users form. This new grid allows administrators to manage the Forum and support contact information for each of their users. This information can then be sent to Allpro Technology so we can add each of your users to our forum and support system. In the near future, Allpro Technology will not be able to provide any support for any software user that is not in our support system.
8. A new **Details button** has been added to the Permissions grid located on the Users form. When selected, the User Permissions Details web page will be displayed and the section explaining the permission in detail will be displayed. This new web page will allow us to provide much more information for each permission.
9. A new **"On Credit Hold"** warning has been added to Allpro Insulator. Users can create a new Terms value called "On Credit Hold" (must be typed exactly as listed). The "On Credit Hold" terms value can be selected for any customer that is currently on credit hold. Then if a user selects the customer on the Estimates form, Estimate Wizard form, or SchedulePro form, a warning will be displayed indicating that the customer is on credit hold.
10. The **Job Costing and Payroll Splits** forms will now display the Estimate Number on the form tab similar to how the Estimates form tab is displayed.

11. A **Refresh button** has been added to the Time Sheet form.
12. When a user creates an **Auto Changeup**, the Auto Changeup package will now be locked by default.
13. In previous versions, when the Item Details form loaded, the “Show All Items” link was displayed even though all items are displayed by default. In the latest release, the link now displays “Show Active Items Only”.
14. The **“ES”, “JS”, and “CS” buttons** that are displayed on the Estimates form can now be associated with custom reports. When selecting the default reports on the Preferences form or Users form, users will now select the Report ID for the report that they would like to set as their default report. This will allow the user to set any report as a default report, not just the most common reports.
15. When exporting an estimate, the **Estimate Number** will now be part of the file name (Example: EstimateDescription_50201.00_0).
16. In previous versions, if a user entered a zip code and then tabbed over to the City field, if the City had multiple zip codes, the first zip code would be selected which would overwrite the original zip code entered. This issue has been resolved.
17. In previous versions, if a user were to open an Estimate through SchedulePro and then navigate from the Estimates form to the Job Costing form or Payroll Splits form, and then try to re-open the Estimates form, a dialog that states, "No Estimate Exists" would be displayed. This issue has been resolved.
18. In previous versions, Plan Templates would validate data against QuickBooks. The QuickBooks validation has been removed when working with Plan Templates as Plan Templates do not have a Job associated with them.
19. In previous version, when a user created a copy or revision of an estimate, some values were not copied into the new estimate. Most notably, was the Sub Assembly Multiplier field. This issue has been resolved.
20. In previous version, when a user clicked on the Full Details tab located on the Estimates form, a new row could sometimes be created even if the user did not type anything into the new row. In the latest release, any new rows that are created that do not contain any data will be automatically deleted.
21. In previous versions, when a user clicked on the Full Details grid located on the Estimates form, if there were not any unlocked packages a message would be displayed indicating that “No Packages Exist”. In the latest release, the warning message will only be displayed when a user selects the Package ID dropdown list if there are not any unlocked packages.
22. In previous versions, the Crew field on the Time Sheet form did not have a dropdown list. The dropdown list has been added to the latest release.
23. In previous versions, if a user were to create a new record on the Full Details grid located on Estimates form, and NOT select an Item ID, the record would be orphaned. The record would no longer show up on the Estimates form, but would be displayed on the estimate, job sheet, and costing sheet reports. This issue has been resolved.
24. In versions prior to 10.2.1, the SchedulePro calendar would not allow the All Day Events section to take up more than 50% of the day view. In version 10.2.1 and later, a scroll bar has been added to the All Day Events area so users can view all scheduled appointments.

Version 10.2.0 (Previous Version Release)

1. Additional features have been added to the Update utility located on the Item Details form. Users now have the ability to set a specific value for the following fields: Coverage Per Unit, Labor Time, Item Category, Crew 1, Crew 2, and Product ID. This allows the user to filter the grid to only display the records they would like to update. They can then select the field they would like to update and then enter a static value they would like set for that field. Users can also select the “Set Value” option to set any other field to a specific value as well. For example, the user could filter the grid to display the records they would like to update and then use the “Set Value” Update Type to set every “Other Cost” to equal \$0.03.
2. The Product Details form has been improved to now allow users to automatically set their Sales Price based on any Material Cost changes while maintaining the same profit margin. This will greatly streamline Price/Cost changes due to product material cost changes.
3. Users now have the ability to print reports by accessing their User Report List from the Schedule Appointment dialog form. This allows users to quickly and easily print Estimates and Job Sheets directly from the Schedule form.
4. When opening the Estimate form, the title displayed on the window tab will now list “E/I #:” followed by the Estimate #. This will make it much easier for users to locate specific estimates when working with multiple estimates simultaneously.
5. Users now have the ability to Associate Employees with jobs on the Scheduled Jobs form. In previous version this ability was only available on the Load Sheets form.
6. The Main Menu Bar that is displayed when Allpro Insulator is running in Full Screen mode has been updated to include all available forms.
7. Several Costing Reports have been updated. The ‘\$’ and the decimal values have been removed to allow more space on the report. We have had several customers that when working with large jobs are not able to view costing details because the large values would not fit in the space provided. By removing the dollar sign and the decimal values, costing values should be displayed for jobs of all sizes.
8. The ability to export grid data to PDF or Microsoft Excel has been added to the shortcut menu on the Product Details form.
9. Several additional forms now include the Allpro Insulator Help Bar which is located at the very bottom of the form. The Help Bar provides field by field instructions along with links to relevant training videos and web page tutorials.
10. The Sales Reps form have been updated so users are not able to select a User Name or Estimate Access that does not appear in the dropdown list.
11. A Refresh Panel has been added to the Item Details form. This panel will be displayed after items have been sent to QuickBooks. The Item List will need to be refreshed in order to update the Insert In QB checkbox value.
12. In previous versions, if a user tried to send an item to QuickBooks that did not have an Item ID, an error message would be displayed. In the current version, any item that does not have an Item ID will not be in the list of items to send to QuickBooks.
13. When opening an estimate from the Schedule Appointment dialog, a prompt informing the user that the current estimate does not contain any packages was displayed. This warning message has been removed.
14. A new “Load all line item notes for the current estimate” shortcut menu option has been added to the Line Item Notes grid. In previous versions, all line items would be loaded into the grid. This included both regular line items and line item notes. In the latest version, only Line Item Notes will be loaded when selecting this menu option.
15. When working with the Payroll Details grid, some users raised a “Failed to Enable Constraints” error message. This issue has been resolved.

16. When changing the Total field on the Full Details grid of the Estimates form for an item that has Sub-Assemblies, an error message would be displayed. This issue has been resolved.

Primary Enhancements

NOTE: In Version 9 we introduced our Multi-Day Splits Optional Module. For Version 10, this optional module has been renamed to our Advanced Features Module. Several additional high level features have been added to this optional module for Version 10. Note that if you previously purchased the Multi-Day Splits Optional Module, you will automatically receive the new Advanced Features Module free of charge when you purchase Version 10.

51. A HUGE FOCUS for the Version 10 upgrade was to **increase the user's productivity**. We have made several enhancements throughout Allpro Insulator that simplify common tasks. These range from reducing keystrokes for common tasks to adding shortcut menus to almost all grids. We have also made it much easier to access related data on other forms via quick shortcut menus. We understand that as the economy recovers, everyone is getting busier. We have made huge strides to ensure that your time is not wasted.
52. As part of our Version 10 release, Allpro Technology will now be offering **Custom Reporting Services**. Allpro Insulator has been modified to allow Allpro Technology to create, edit, and distribute completely custom reports via our Allpro Cloud Services. For the first time, Allpro Technology will be able to create reports that are designed specifically for your company, and only for your company. This will allow us to tailor any existing reports or completely new reports to meet your exact specification. All custom reports will be uploaded and distributed to your cloud database. This will allow us to distribute custom reports to only the customer that they were designed for. This will also allow us to distribute updated reports without requiring you to install any upgrades on Allpro Insulator. All custom reports will automatically sync to each computer, which will greatly reduce distribution time. The price you will pay for custom reports is on a case by case basis depending on the complexity of the report. [{Requires Allpro Cloud Services – Sync Service or Allpro Cloud Services – Back 365}](#)
53. A **new Tiered Pricing feature** has been added to Allpro Insulator. This comprehensive new feature allows users to create multiple pricing tiers for each item. Each Tiered Pricing item can have completely unique values (sales price, material cost, labor cost, description, etc.). There are multiple options that can be used to specify which tier is to be used (Job Location, Job Type, Tier Level, or any combination of these). If the Job Location or Job Type are changed at any point throughout the estimating process, all pricing values can automatically be updated. Tiered pricing is also applied to line item upgrades. [{Part of the Advanced Features Module}](#)
54. A new set of **Master Job Sheet reports** have been added to the Scheduled Jobs form. Master Job Sheets allow users to select a date range, Location, and Crew. The user can then view a single report which will contain all of the job sheets for the estimates that are scheduled in that date range for the specified Location and Crew. This greatly reduces the amount of time required to print out job sheets because all the job sheets will be printed as one report (separated with a page break for easy distribution). [{Part of the Advanced Features Module}](#)

55. The **Allpro Cloud Services – Sync Service** has been completely overhauled. The sync now runs as a Windows service rather than as a standard program. This should greatly reduce issues with the sync not starting or running properly. We have also designed the new sync to be fully administered from our cloud server. This allows us to make changes to your sync settings as well as troubleshoot sync issues without having to remote into your computers. Nearly all changes can be made on our end. We have also added a much more comprehensive sync log which contains sync statistics that both the user and Allpro Technology will have access to. For example, users will be able to view a detailed sync log for every sync which will display the quantity of records downloaded and uploaded for each table.
56. The process in how **sub-assemblies are inserted** and used has been greatly enhanced. This will in no way require users to reset up their sub-assembly items. We have just added multiple additional options in how they can be used and also improved the performance of how they are inserted.
57. There is a new **“Multiplier” column** that has been added for sub assembly items. This multiplier allows the user to select how many sub assembly items will go with each main item. For example if you had R-19 insulation as the Main item and you wanted 2 F-baffles to be included with every 1 unit of R-19, you would set the multiplier on the F-baffles to be 2. If you wanted only one half of an F-baffles to be used with every 1 unit of R-19, the multiplier would be set at .5.
58. **Sub Assembly items now show up** on an Estimate Report or Job Sheet just like any other item.
59. There is now a **Hide All Sub Assembly Items function** on the Full Details Tab of the Estimates Form. This will hide all sub assembly items which allows the user to now easily see the estimate’s primary items.
60. There is new **Payroll Details grid** located on the Payroll Splits form. This grid provides comprehensive information regarding all hourly and piece work payroll splits. This information can be used to generate very specific details for administrators and employees. Complete details can be provided so employees know, to the penny, exactly what they are being paid for. Every single item, quantity, percent, etc. will all be displayed in the Payroll Details grid. *{Part of the Advanced Features Module}*
61. There is now an option to use Allpro Insulator with **Dual Monitors**. If you click the Layout Mode button at the top of Insulator there are multiple layout options which allow Allpro Insulator to fully utilize dual monitors. The Estimates form and Payroll Splits form have also been optimized to utilize dual monitors. This allows the user to have some tabs/grids moved to the second screen which provides additional room for the primary tasks.
62. There are three new user preferences to **change / save the layout** of Allpro Insulator. The first is Layout – Main Screen. This preference allows the user to setup how Allpro Insulator will open (this option is the same as the Layout Mode button at the top of Insulator.) The second preference is Layout-Estimates Form. This option allows the user to set how the tabs on the bottom grid of the estimates form are displayed. The third preference is Layout-Payroll Splits Form. This option allows the user to set how the bottom grid of the Payroll Splits form will be displayed.
63. A **detailed help bar** has been added to all primary forms and will be added to the remaining forms in future minor version upgrades. The help bar allows users to look at the bottom of the form to view detailed instructions about the current field along with whether the field is optional/required and the character limit. The user can also select

the “View Video” or “View Help Page” button to display videos and web pages that are directly related to the object that they are on. This provides much more detailed and accessible help which will allow users to easily learn about new and existing features.

64. There is a preference (in Preferences or Software Users) which allows the user to set the **size of the new Help Bar**. Options are Hidden, Small, Medium, or Large.
65. The user now has the option to **export grid data to either Adobe PDF or Microsoft Excel**. This can be done by right clicking on the grid and selecting the export option from the shortcut menu. This will allow users to easily access and manipulate grid data outside of Allpro Insulator. Also note that only data displayed on the grid will be exported. This allows users to apply data filters, show/hide columns, and rearrange columns, etc. before the data is exported. The exported PDF or Excel file will be created based on the exact grid settings, so users will have full control over their exported data.
66. On the Item Details Form there is a new **field for users to enter a “Time”** for each item. For example if it takes .5 minutes to install a square foot of W4 you could enter .5 in the Time column. This allows users to better estimate the amount of time a job should take. The total time required values can be displayed on the Job Sheets reports.
67. There is a new **Auto Changeup option** on the Full Details Grid of the Estimates Form. The user now has the option to right click on a line item and select Auto Changeup. This allows the original line item to be saved in an automatically created Auto Changeup package. The user can then make changes to the original line item while keeping a detailed record of any changes made.
68. If the user clicks the “Data” Button on the top toolbar, there is a new option to **Create / Access Estimate as another sales rep**. There is also new permission called Create / Access Estimate As which must be set to read / write to allow the user access to this feature. This new feature allows administrative users who often create estimates for other users to easily create estimates as if they were that other user.
69. Users now have the ability to **store and associate pictures with a job**. This allows users to upload pictures associated with a specific job and enter comments for each picture. These pictures can be viewed from the Customers, Estimates, and Job Costing forms.
70. Users can now **associate employees with an appointment** on the Scheduled Jobs tab of the Load Sheets form. This will help make scheduling jobs even easier. Then when performing payroll splits on the Payroll Splits form, the user will be able to easily see which employees were associated with the scheduled job for any given day.
71. Users can now load a **“Manager” Dashboard**. This will remove the Sales Rep filter from the User Dashboard and allow the user to see every sales rep’s information with regards to estimates and invoices. The dashboard graphs will also load values from all estimates / invoices to provide a better overall picture for managers.
72. **Date/Time Created and Date/Time Updated** fields were added to the Item Details form so the user can easily track any item price changes.
73. The **Global Access, Date/Time Created, Date/Time Updated, Updated By, and Updated On** fields have all been added to the following forms: Estimates Form, Job Costing Form, Payroll Splits Form, Estimate List, Package List, and

QuickBooks Ready List. This will allow users to easily track data changes as well as see who those changes were made by.

74. The Check All Checkbox located on the Packages grid of the Estimate Form has been removed. This checkbox was replaced with a **Package Presets** dropdown list. This allows users to select a value from the dropdown list and then the corresponding checkboxes will be checked. This allows users to quickly check multiple checkboxes based on the preset selected.
75. On the Packages Tab of the Estimates Form, the Package Name was moved to the first column. Now when a user enters a Package Name, the **Package ID value** will be set to match the Package Name by default. As we have noticed that most of our customers now use the same value for each, this will eliminate requiring any double entry.
76. There is a new grid on the sync log form that allows users direct access to their live **detailed cloud sync details**. This provides much more details about the sync than the standard sync log. For example, users will be able to see sync statistics for every sync (quantity of records downloaded and uploaded, for each table).
77. Line item upgrades are now **automatically updated** when a user runs the Update Prices/Costs utility.
78. When manually entering an Estimate Number, Allpro Insulator will now automatically check to make sure that the **Estimate Number does not already exist**.
79. On the Estimates form, users can no longer **set the Price Style or Job Status** to a value that is not included in the dropdown list.
80. The double-click to view **column view** on the Estimates form has been removed. Users can still select the Column View button to view the Column View.
81. There is now a **Remote Support button** on the main toolbar of Allpro Insulator. This button will take the user to www.fastsupport.com which will allow Allpro Technology to provide faster remote support.
82. There is now a user preference to warn a user when trying to open a **form that is currently open**. If this box is left unchecked the form will just open. If the box is checked a warning will pop up when trying to open a duplicate form.
83. On the Full Details grid of the Estimates Form **users can now right click** on a line item and have the option to view the current Item on the Item Details Form. When selected, the Item Details form will open and the current item will automatically be selected.
84. On the Full Details grid of the Estimates Form **users can now right click** on a line item and have the option to view the current Product on the Product Details Form. When selected, the Product Details form will open and the current product will automatically be selected.
85. After a payroll split is applied in Version 10, the **time sheet record will be locked**, as will the payroll split record. This will prevent users from accidentally including a previously paid employee in the next split.
86. On the Customers Form, Estimate Wizard, and Customer / Job tab of the Estimate Form the user can now **enter the city** they will be working in and it will automatically fill in State and Zip Code.
87. If a user enters a zip code on the Customers form or Estimate Wizard that does not already appear in the dropdown list, the user can **automatically add the new zip code** to the list.

88. The **User Dashboard** now includes Shortcut menus which can be accessed by either right or left clicking in each of the different grids. These shortcut menus allow the user to quickly and easily access various forms based on the record selected.
89. In Version 10 users can no longer make any changes to an Estimate if there is not a **valid Customer / Job selected**. A gray panel now covers the form until a Valid Customer / Job is selected.
90. In the Software Users form there is a new permission called **Line Item Description** which provides the ability to lock Line Item Descriptions.
91. When Allpro Insulator first opens up, a **new Tips and Tricks message** will be displayed while the license is being processed. This provides users with useful information while they are waiting for Allpro Insulator to load.
92. The **last sync** (if sync is being used) will be displayed at the bottom of the log in screen directly below where the User Name is selected. This allows the user to easily see the last time their data was synchronized.
93. On the User Preferences form, the user now has the ability to add up to **5 different state zip code filters**. Filter Zip Code Lists by State is the name of the preference and all states must be separated by a comma. This allows companies working in multiple states to have access to additional zip codes.
94. There is a **new User Wizard**, which allows the user to create a new user or edit an existing user's permissions. This new wizard streamlines the process of working with users and helps ensure all data is completed correctly.
95. There is now an option on the Options Tab of the Company Setup form to **lock a package after a PO is applied**. If this option is set to true, the package will automatically be locked when a PO amount is applied.
96. There is now a **global access checkbox** in Insulator that allows everyone to see an estimate, even if the estimate was made by a different sales rep.
97. On the User Dashboard there is now a **recent estimates panel** which lists recent estimates that have been worked on. In the Recent Estimates Panel, if the user right or left clicks within the panel, a whole list of options will be displayed. This allows users to easily access estimates that they are currently working on.
98. On the Estimates form, opening the Job Costing form or Payroll Splits form now closes the Estimate form. From the Job Costing form, or Payroll splits form, on the toolbar there is now buttons to **switch to** either the Estimate Form or the Job Costing / Payroll Splits form.
99. A **refresh button** has been added to the Find Duplicate Customers Form. (Data – Find duplicate customers).
100. **The Quick Find Panel** has been greatly enhanced. (In the very top toolbar in between reports and new window). Users now have the option to search for estimates by Estimate Number or by Customer / Job. Users can also search for a customer by Customer / Job or by Customer Name.
101. If a user right clicks on a tab in Insulator there is now an option to **close all open forms**. Users also have the option to move the open tab to a different tab group.
102. If the user tries to create an estimate using the Estimate Wizard and quits before the estimate is finished, a prompt will pop up warning them that **no new records will be created**.

103. A new procedure has been added to the Sales Reps' form that **no longer allows multiple sales reps** to be associated with the same user.
104. **A notes column** has been added to the Multi Day Splits Grid of the Job Costing form.
105. When a user tries **to delete an estimate**, there will now be two prompts that pop up warning the user that they are about to delete an estimate. The second prompt will appear in all caps. This is intended to help prevent users from accidentally deleting an estimate.
106. There is now a **remove crew filter checkbox when viewing Job Sheets** from the Scheduled Jobs form. The user can click on the View Master Job Sheet Report Dialog and then Pick Job Sheets from the Report Group. Under document action on the Report Master form, the user will see a Remove Crew checkbox.
107. The **Max Length** has been set on all fields that a user can enter information into. This will prevent users from entering too many characters into a cell.
108. If a user's permission is set to read only, they will now be able to view appointments via a **new appointment tooltip**.

109. Keyboard shortcuts have been added for commonly used toolbar options.

Common Shortcuts

Close	CtrlQ	
Delete	CtrlD	
Edit	CtrlE	
First	CtrlI	(i)
Help	CtrlH	
New	CtrlN	
Last	CtrlL	
Next	CtrlT	
Prev	CtrlR	
Print	CtrlP	
Refresh	CtrlR	Only used when the form does not contain Prev
Save	CtrlS	

Additional Shortcuts - Estimates Form

ES	Ctrl1	Displays the default estimate report
JS	Ctrl2	Displays the default job sheet report
CS	Ctrl3	Displays the default cost sheet report
Full Details	Ctrl4	Makes the Full Details tab the active tab
Packages	Ctrl5	Makes the Packages tab the active tab
Schedule	Ctrl6	Makes the Schedule tab the active tab
Job Sheet	Ctrl7	Makes the Job Sheet tab the active tab
Payments	Ctrl8	Makes the Payments tab the active tab
Projected	Ctrl9	Makes the Projected tab the active tab
Customer	Ctrl0	Makes the Customer tab the active

Bug Fixes

39. In the product Details form you can now enter a full name while doing a search for Product ID and you will not get an error.
 40. On the Item Details form the Active Checkbox can now be checked or unchecked.
 41. In the Options Tab of the Company Setup Form, if you change “Set Package Date Completed to: Today” to “Prompt” It will prompt you twice when you change the completed date of the package (on the packages tab of the Estimates Form) to today.
 42. If you use the rename Customer or Rename Job utility on the Customers Form, it will no longer allow you to rename a customer or job to something that already exists.
 43. If creating a new Estimate using the Estimate Wizard the default Job Type is no longer set to be “New Job” provided the user has a Default Job Type preference set on the Preferences form.
 44. In the notes tab of the Estimates Form, if you right click in the notes grid there is an option to right click in the grid and load all line item notes. This allows the user to delete any and all line item notes. This way there will be no orphaned notes.
 45. In previous editions occasionally Line Item Notes would not show up correctly on an Estimates Report. This issue can now be fixed by ensuring that each line item has a unique sort order value. You can ensure this by going into the Company Setup form, going to the options tab and setting the Estimate Line Item Sort Order to either Line Item Order or Item Details Order. If set to Line Item order the sort order will be determined based on the order your line items exist in the Estimates form. If you choose Item Details Order the sort order will be based on the sort order set in the Item Details form.
- You no longer have to close and reopen an Estimate form to get newly setup Sub-Assembly items to appear correctly.

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, 2014 was our best sales year ever so we were able to put a great deal of time and money into Allpro Insulator Version 10. Our staff spent over four 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 of these new features should help make your business more profitable and productive.

Version 9.6.2 (Previous Version Release)

Item Details Sync Issue

Some users have experienced issues with a small percentage of their items not syncing properly. This issue only affects Stand Alone Edition users who are also using the Allpro Cloud Services Sync Service.

In some instances, after the new item has been created on the Item Details form, the new record may not properly sync to the cloud database. This will cause new items to remain only on the computer they were created on.

Another related issue that some users are experiencing is changes to items not syncing properly. For example, if you were to make price changes to a single item on the Item Details form, some of those changes may not sync to the cloud properly which in turn means the changes may not sync down to the other sync computers properly.

This issue has been resolved in Version 9.6.2.

Version 9.6.1 (Previous Version Release)

1. A new Grand Total Label field has been added to the Options tab of the Company Setup form. This field can be used to change the Grand Total label that appears at the bottom of the Estimate reports. For example, rather than using the current "Grand Total:" value, the value could be changed to "Total Before Options:". Note that if the Grand Total Label value on the Company Setup form is left blank, the default value will be set to "Grand Total:".
2. A new "Exclude Hidden Items From Job Sheet" option has been added to the Company Setup form and the Estimates form. When set to "Yes", line items that have the "Hide" checkbox checked will be excluded from the Job Sheet Reports. When set to "No", line items that have the "Hide" checkbox checked will be displayed on the Job Sheet reports. The company default can be set on the Options tab of the Company Setup form and users also have the option to temporarily change the setting on the Job Sheet tab of the Estimates form.
3. An issue that has caused Allpro Insulator to stop responding when being closed on a Windows 8 computer has been corrected.
4. An issue that would sometimes cause sub assembly items to not load on the Estimates form has been corrected.
5. An issue that has caused the Report List to not load correctly on some computers has been corrected.
6. A scroll bar has been added to the Customer/Job tab which appears on the Estimates form. The scroll bar is necessary for low resolutions devices such as Microsoft Surface tablets.
7. The ability to add a space to a customer name when using the Rename Utility has been removed. This will help prevent in proper customer naming issues.
8. The "#" label located at the top of the Invoice report has been changed from "Estimate #:" to "Invoice #:".
9. The Database Timeout duration has been extended from 30 seconds to 240 seconds on the Report Master (M) form. This will allow more processing time to generate report totals that cover a large quantity of records.

Version 9.5.0 (Previous Version Release)

1. All of the **Estimate and Job Sheet reports** have been slightly modified. The solid line that is used to separate each line item has been moved to the top of the row, rather than at the bottom. This makes the Estimate / Job Sheet more easily readable when there are Line Item Upgrades and Line Item Notes below the main item. The Item ID and Product ID fields have also been set to allow them to span multiple rows. This will allow users to see the entire Item ID and Product ID even when working with large IDs.
2. In previous versions, when a user checked the **Hide checkbox** on the Full Details grid of the Estimates form, the hidden items would not be displayed on the Job Sheet reports. In the past we have had several of our customers mention that while they do want these items to be hidden on the Estimate reports, these items should be printed on the Job Sheet reports. We have taken their suggestion and made the necessary changes so now all hidden items will be displayed on the Job Sheet reports.
3. The following changes have been made to the **Schedule Job grid** which is located on the Estimates and Customers forms:
 - a. Users now have the ability to set and edit the appointment times.
 - b. Users now have the ability to delete appointments.
 - c. A dropdown list control has been added for the Crew field.
4. In previous versions, the **Projected Inventory** would include both bids with a Status of "Estimate" and a status of "Archived". This would cause inaccurate values when viewing Projected Inventory. This issue has been resolved by only allowing bids with a status of "Estimate" to be included in the Projected Inventory calculations.
5. The **Terms grid** on the Company Setup form has been modified to only show the fields that are used by Allpro Insulator, rather than showing all the fields that are also used by QuickBooks. A Refresh Terms button has also been added which allows users to easily see Terms that have recently been imported from QuickBooks.
6. In previous versions, if a user was using the **Markup Price Style** on the Estimates form and applied a Custom Discount/Markup Percent, the same rate would be applied to all updated fields, rather than applying the appropriate rate change. This issue has been resolved.
7. In previous versions, when **applying price or cost changes** on the Item Details form, in some instances the last record in the grid would not be updated. This issue has been resolved.
8. In previous versions, when a user selected a **Package Name on the Time Sheet form**, the Package ID value would not automatically be placed in the Package ID field. This issue has been resolved.
9. QuickBooks does not allow the use of the **colon " : " character** in the Customer, Job, or Item name. To help eliminate issues when sending data to QuickBooks, Allpro Insulator will no longer allow users to enter the colon character when entering Customers, Jobs, or Items.
10. In previous versions, when users selected the **checkboxes** on the Job Costing and Payroll Splits forms, they would be required to leave the checkbox before any changes would be applied. This required unnecessary keystrokes. This issue has been resolved.
11. The ability to delete or rename the **"Admin"** software user has been removed.
12. In previous versions, if a user selected the **View button located in the Plan ID** field on the Estimates form, a generic error message would be displayed if a valid Plan ID was not selected. This message has been replaced with a more descriptive message.
13. An issue with the **Merge** feature on the Estimates form has been corrected.
14. In previous versions, if a user were to **group by** any column on the Item Details form, an error message would be displayed. This issue has been resolved.
15. In previous versions, if a user were to select the **Past Due Statement** report from the Reports – General report menu, the Accounts Receivable report would be displayed rather than the Past Due Statement report. This issue has been resolved.

16. Many other miscellaneous improvements and bug fixes.

Version 9.3.2 (Previous Version Release)

1. The formatting for the Customer Statement and Customer Past Due Statement has been updated.
2. The Sync Log is now accessible to all users.
3. Various minor improvements to the Crew Edition have been made.

Version 9.3.0 (Previous Version Release)

1. Several enhancements have been added to the way Line Item Notes and Line Item Upgrades appear on the printed estimates and job sheets.
 - a. Line Item Notes now appear directly below the associated item, rather than just appearing at the top of the package.
 - b. If the DOE checkbox is not checked for the Line Item Note, the note will not appear on the printed estimate.
 - c. If the DOJ checkbox is not checked for the Line Item Note, the note will not appear on the printed job sheet.
 - d. If the DOJ checkbox is not checked for the Package, no Line Item Notes for that package will appear on the printed job sheet.
 - e. Line Item Notes no longer appear on the Costing reports.
 - f. If a user selects the Hide checkbox for a Line Item Upgrade, the upgrade will not appear on the printed estimate.
2. Users now have the ability to create Global Attachments. Global Attachments can be added to all email messages and DSign messages. This provides users with an easy way to attach common PDF files such as Terms, Company Policies, Agreements, etc. Global Attachments can be created on the Company Setup form. Provided that the "Attach Product Spec Sheets" checkbox is checked on the Preferences form, the Attachments added on the Company Setup form will automatically be added to all email messages and DSign messages.
3. Product Spec Sheet integration has been added to the Allpro DSign module.
4. When manually attaching new Product Spec Sheets on the Report Master form, the Attach checkbox is checked by default.
5. The Excess Multiplier is now used when calculating projected product quantities on the Product Source Sheet reports. Note that the Multi-Day Splits optional module is required to use the Excess Multiplier.
6. When selecting the Estimates button from the calendar appointment dialog, when the Estimates form opens, only estimates will be displayed. Any records with an Invoice, Archived, or Plan Template status will not be displayed. This ensures users are only viewing the active estimate.
7. Users now have the ability to update values on the Item Details form based on the Total Cost column. For example, users can specify that they would like to make the values in the Other Cost column equal five percent of the Total Cost value.
8. A new permission has been added for the Progress field on the Estimates form. When set to "No Access" users will not have the ability to update the Progress or Progress Changed fields. By default this permission is set to Read/Write for existing users.
9. SSL support has been added to the Email – Direct feature. This allows users who have an email address that requires SSL support to send emails directly from within Allpro Insulator (such as Gmail).
10. If the current user has "Use Microsoft Outlook" selected on the Preferences form, the option to Email – Direct will not be visible.
11. The Sync Log which is accessible from the Data menu has been enhanced. The log now includes the Computer Name\Windows User Name. This will help users better determine which computers are which when viewing the log.
12. An issue with the Package Name not being automatically be set when a user selects the Package ID on the Time Sheet grid located on the Pay Splits form has been corrected.
13. When sending Items to QuickBooks, some users may have experienced issues with the item not being marked as sent even though the item was successfully sent. This issue has been corrected.
14. An issue with the Appointment Dialog not saving Customer Name changes has been corrected.
15. An issue with the Users Profile report not loading correctly has been corrected.
16. An issue with the Inventory Balances reports not loading correctly has been corrected.

17. An issue with the Zip Code Filter located on the Company Setup form has been corrected.

Several other minor enhancements and corrections were made.

Version 9.2.0 (Previous Version Release)

1. The Allpro DSign service now support Microsoft Outlook integration. Users now have the ability to specify whether they would like to send DSign emails from directly within Allpro Insulator or send the message via Microsoft Outlook. The send via Microsoft Outlook option can be set on a user basis from the Users or User Preferences forms.
2. Software Administrators can now specify that they would like certain sales reps to have access to all Plan Templates, regardless of who the sales rep was that created them. This access level can be set on the Sales Reps form.
3. The Crew column was added to the Scheduled Jobs grid located on the User Dashboard form.
4. The “Costing Reports - Jobs By Customer/Job Package” report was added back to Version 9.2.0.
5. An issue with sending updated customers and jobs to QuickBooks has been corrected.
6. An issue with the way the estimates are filtered on the Scheduled Jobs grid of the Scheduled Jobs form has been corrected. By selecting the Start Date and End Date all the estimates will be displayed in the grid below regardless of the Time of Day set.
7. An “Invalid Cast Exception” error message has been removed when creating Plan Templates.
8. The ability to properly display company information on the estimate report has been added when printing Plan Templates.
9. The ability to open the Customers form from the Estimates form has been added when working with Plan Templates.

Version 9.1.0 (Previous Version Release)

1. Changed the decimal places allowed for Projected Unit Qty, Actual Material Unit Qty, Actual Labor Unit Qty, and Difference fields. Rather than storing two decimal places, these fields can now store up to six decimal places. This will allow more accurate job costing and profit analysis for products that have a large Coverage Per Unit Value. This is common for foam products.
2. The ability to open the User Report List has been added to the Launch Menus that appear throughout Allpro Insulator. This makes it much easier to print commonly used reports without having to open the Estimates form.
3. Add the "Hide Subtotal" on estimate report support for the "ES" button located on the Estimates form.
4. Corrected an issue with having null values entered in the Email Subject and Body fields.
5. Corrected an issue with the "Copy Down" button on the Estimates form.
6. Added support for Job Costing with Sub-Assemblies.
7. Minor adjustments were made to some of the Costing Reports.
8. The Print button on the Job Costing form now loads the standard Job Costing Reports.
9. A more informative error is now displayed if the current sales rep has duplicate customers created. This error is displayed when the User Dashboard form loads.
10. An issue with the Estimate ID being saved in the Plan ID field has been corrected.
11. An error message would occasionally be displayed when some estimates loaded. This message has been suppressed.
12. Other miscellaneous fixes and improvements.

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.
- 7. 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.
- 8. 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 son on. This feature will make it easier for users to track related estimates and invoices.
- 9. 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.
- 10. 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.
- 11. When creating new estimates, after selecting the Customer/Job, the **Estimate’s Source** will be set to the Customer/Job’s source by default.

12. 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.).
13. 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.
14. 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.
15. 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.
16. 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.
17. 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.
18. 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.
19. 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.
20. 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!

Version 8.4.5 (Previous Version Release)

1. A few changes were made to multiple costing reports on the Estimates and Reports forms.
2. When changing the Status of an Estimate, the Customer/Job would automatically be re-selected. This would cause the Sales Rep and other default data to be loaded from the Customers form. The Tab Stop has been removed from the Customer/Job dropdown list to ensure users don't accidentally reselect the Customer/Job.
3. A new report (Hourly AND Piece Work Pay Slip – OT #2) has been added to the Time Sheet form. This report uses a different method for calculating overtime pay. Note that it is up to each employer to determine which payroll calculation method is accurate for their company, location, and situation.
4. The panel height has been increased for the Pay Splits Panel located on the Estimates form. This height increase makes the fields more readable when the horizontal scroll bar is present.
5. A new Help button has been added to the Upgrades panel which will provide users with details about installing future upgrades.

See below for major improvements made for Version 8.3.1

Version 8.3.4 (Previous Version Release)

1. A memory issue that has been causing some users to experience issues with Allpro Insulator closing unexpectedly has been corrected.
2. An issue with some of the permissions on the Estimates form has been corrected.
3. An issue with the Product Spec Sheet dialog not being displayed has been corrected.
4. An issue with the Item ID dropdown not being populated on the Job Costing form has been corrected.

See below for major improvements made for Version 8.3.1

Version 8.3.1 (Previous Version Release)

NO SMALL UPGRADE! *(Over two full months were spent working on Allpro Insulator Version 8.3)*

5. A new **Attach Product Spec Sheet** feature has been added to the Product Details form and Estimates form. This new feature allows users to link a PDF product specification sheet to a specific product. When that product is used on an estimate, users have the option to automatically attach the product specification sheet to the email, along with the estimate. This allows users to easily attach additional documents that pertain to the products included in the estimate.
6. A new **Scheduled Jobs form** has been added to Allpro Insulator. This form allows user to view all of the jobs that are scheduled within a specific time period. The Default Job Sheet and Product Source Sheet can be printed directly from this form without needing to open the estimate. Users can also access the new Job Costing form directly from the Scheduled Jobs form.
7. A new **Job Costing form** has been added to Allpro Insulator. This form allows users to enter Actual Material and Actual Labor quantities for the items that were listed on the estimate. Users also have the ability to add additional Items and/or Products to the Job Costing form. This allows users to enter miscellaneous items and products for job costing purposes, which will not affect the estimate total. Users then have the option to include the miscellaneous items/products on the job costing reports.
8. A new **Accounts Receivable Center** has been added to Allpro Insulator. This form is accessible from the Main Toolbar. The A/R Center allows users to manage aged receivables as well as print a variety of accounts receivable and customer statement reports.
9. A new **Produce Invoice** feature has been added to Allpro Insulator. This allows users to split a single estimate up into multiple invoices for billing purposes. Users can easily select which packages they would like to include in the new invoice. This provides the ability to manage a separate amount due, due date, etc. for each invoice. The job costing can still be managed on the Estimate for simplified management purposes.
10. A new **View Related Estimates form** has been added to Allpro Insulator. This allows users to view all Estimates and Invoices for a specific Customer/Job. This feature is especially useful when users are working with a single estimate and multiple related invoices.
11. Each time Allpro Insulator opens and your computer is connected to the internet, a new **"Insulator News"** tab will be displayed. This page will display the latest news about Allpro Insulator, along with details about our latest "Hot Existing New Features" and "Up-and-Coming Features". The Insulator News page allows Allpro Technology to have better communication with our users on a daily basis.
12. Several new **Pay Slip reports** have been added to the Time Sheet form. These reports allow users to produce employee pay slips for Hourly, Piece Work, Hourly or Piece Work, and Hourly Plus Piece Work. Regardless of how you pay your employees, you will likely find a new Pay Slip to fit your needs.
13. **Additional Costing Reports** have been added to more easily combine Time Sheet Hourly Pay with Material Cost and Other Cost to determine Actual Profit. This report is useful to those who pay their employees strictly by hourly pay.
14. A **separate permission** has been created for each of the main tabs located on the Estimates form. This allows administrators to restrict users from having access to specific areas of the Estimates form. For example, you could restrict your sales reps from having access to the Projected vs. Actual tab and/or Payment tab.
15. A separate permission has been created for the **Actual Material Unit Qty** and the **Actual Labor Unity Qty**. This allows administrator the ability to restrict access to these columns individually.
16. **Additional Product Source Sheets** were created which contain additional columns to provide the crew with more details about the product being used.
17. The **Plan ID** column was added to the Estimate/Invoice reports.

18. **Commission Percentages** can now be calculated based on the Actual Profit of a job.
19. The **Logo and Text header types** have been added to the Estimate reports.
20. A warning informing users that the help page has already been displayed has been removed. This allows users to display help pages from multiple forms at the same time without being prompted.
21. When Sales Reps are imported from QuickBooks, their status is set to Active by default.
22. An issue with the Percentages reports has been corrected.
23. An issue with the Description field on the Product Inventory form not being updated when a user selects a Product ID has been corrected.
24. An issue with the Crew value now being saved when a user creates an appointment on the Estimates form or Customers form has been corrected.
25. An issue with the default Zip Code List has been corrected.
26. An issue with the Crew and Estimate # columns not copying when selecting the Copy Down button on the Time Sheet form and Estimates form has been corrected.
27. A memory issue that has been causing some users to experience issues with Allpro Insulator closing unexpectedly has been corrected.

Version 8.2.1 (Previous Version Release)

1. Some users may have experienced issues with Allpro Insulator crashing or displaying a red X in place of certain controls on forms. This was caused by a memory leak which has now been fixed.

Version 8.2.0 (Previous Version Release)

21. Users now have the option to choose between **five header types** on the Estimates reports. Previous versions offered the ability to have a Text or Letterhead option. In Version 8.2.0, we have added three new logo header types. This allows users to have their logo on the top left corner of the estimates report and then have their company information appear as text directly to the right of the logo. There are three different text options to choose from.
22. Users now have the ability to **exclude the Subtotal** from the bottom of each of the standard estimate reports. This is necessary for users who add a charge for a percentage (for example, a sales commission) but do not want the customer to have the ability to calculate the percentage amount.
23. Users can now create an email message and estimate attachment even when the current **customer does not have an email address** entered on the Customers form. This allows users to manually enter the email address if they do not already have one on file.
24. If an estimate contains line items, a **warning message** will be displayed before a user can change the Customer/Job name. This will help prevent users from accidentally changing the Customer/Job for an estimate that has already been created.
25. Users now have the option to base Estimate Percentages on the **Actual Material Cost** rather than just the Projected Material Cost.
26. In Version 8.1.x an error message would be displayed when trying to edit Job information. This issue has been resolved in Version 8.2.0.
27. In Version 8.1.x the Post Status was not always updating after an estimate/invoice was sent to QuickBooks. This issue has been resolved in Version 8.2.0.
28. In Version 8.1.x the Estimates tab on the Customers form was only showing estimates for the current user/sales rep. In Version 8.2.0, there are now two links located on the Estimates tab that allow users to specify whether they would like to see All Estimates or Current Sales Rep's Estimates.
29. In Version 8.1.x certain changes made to the grid layout on the Full Details grid would not save. This issue has been resolved in Version 8.2.0.
30. In Version 8.1.x users could delete a package even if the package was locked. This issue has been resolved in Version 8.2.0.
31. In Version 8.1.x if a user tried to send an estimate to QuickBooks that contained new items, the QB Communicator would stop the send process after the items were created in QuickBooks. The send process would have to be restarted to send the estimate. This issue has been resolved in Version 8.2.0.
32. In Version 8.1.x QuickBooks Data Validation was taking place on the Estimate Wizard when running Allpro Insulator Stand Alone Edition. This issue has been resolved in Version 8.2.0.
33. In Version 8.1.x users were not able to delete customers after they had been sent to QuickBooks. Now after putting the customer in Edit QuickBooks Customer mode, the Customer can be deleted.
34. In Version 8.1.x if a user has Read Only permissions to the Open Estimates object, the user cannot open the estimate from the Schedule Appointment dialog. This issue has been resolved in Version 8.2.0.

Version 8.1.0 (Previous Version Release)

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

35. 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.
36. 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.
37. 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.
38. 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.
39. 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.
40. 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.

41. 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.
42. 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.
43. 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.
44. Additional enhancements to the **QB Communicator** have been made to further simplify the process of sending data to QuickBooks.
45. **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.
46. 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.
47. 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.
48. 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.
49. 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.
50. 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.
51. 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.
52. 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.

53. 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.
54. 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).
55. 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.
56. **“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.
57. 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.
58. 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.
59. 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.
60. 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.
61. 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.
62. 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.
63. 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.
64. 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.
65. 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.
66. 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.
67. 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.
68. 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.

69. 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.
70. 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.
71. 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.
72. 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.
73. 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.
74. 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.)*
75. 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.
76. The **“Allpro Insulator Help Pages”** have been enhanced to provide more detailed help documentation.
77. 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.
78. The **“Users Form”** has been modified to provide better integration with Allpro Technology’s new Time Block Support System and User Forum.
79. Multiple **“Color Scheme”** options have been added which allows each user to select the primary colors displayed throughout Allpro Insulator.
80. We also have several other small changes that were made throughout Allpro Insulator that are not listed here.

Version 7.2.0 (Previous Version Release)

1. **Hot New Feature** - The Margins grid located on the bottom of the Estimates form has been greatly enhanced. Users now have the option to view margin details by:
 - a. Packages Included/Included (available in previous version)
 - b. Package
 - c. Crew
 - d. Product ID
 - e. Item IDUsers also have the ability to filter which margin groupings are displayed. All margin values are automatically updated when estimate data is changed.
2. **Hot New Feature** - The Reports form now contains a new Filter Panel. This panel allows users to filter the data that will be displayed in the costing and revenue reports. Users can filter by Estimate Status (Estimate, Invoice, Archived, etc.). Users also have the ability to select up to five different Package Statuses that they would like to include in their reports.
3. A new Find Duplicate Customers form has been added. This form can be access from the Data menu. This form allows users to easily see which customers and/or jobs have been entered into Allpro Insulator more than once. Users can then open the Customer or Job in the Customers form to delete one of the records.
4. The Estimate reports now include the sales rep's phone number and email address. In order for their information to display on the report, users need to make sure that there is an employee entered on the Employees form with the exact same name as the Sales Rep Name listed on the Sales Reps form. The employee's Cell Phone Number and Email Address will be displayed on the Estimate Reports.
5. The Job Description field located on the Jobs tab has been changed to "Job Location / Description". This field has also been changed from a standard text box to a dropdown box. This field can be used by companies that have more than one physical location and would like to track jobs for each location individually.
6. A new Estimate Class option has been added to the Company Setup form. When selected, the Class value on the Estimate created in QuickBooks will be created based on the Job Location:Job Type values set on the Jobs tab of the Customers form.
7. Several new reports that group by Location have been added to the Reports form.
8. A new checkbox has been added to the QuickBooks Communicator form. When checked, the Package Labels for each line item will not be sent to QuickBooks.
9. A new Estimate Status has been added to the Status field on the Estimates form. The value "Archived" has been added to allow users to archive previous estimates that they do not want included in financial reports. A common example where users would want to mark an estimate as Archived is when they have created a copy of an estimate before making revisions. To keep financial reports accurate the previous estimate(s) for the Customer/Job should be archived.
10. The Item ID dropdown on the Line Items grid of the Estimates form now requires that users select a valid item that appears in the dropdown list. This will prevent users from entering any items that have not already been setup in Allpro Insulator.
11. The Terms, Sales Rep, and Job Type fields throughout Allpro Insulator now require that users select a valid item that appears in the dropdown list.
12. Tab stops have been added to the City and State fields located throughout Allpro Insulator.
13. An issue with the Cost Sheet: Material + Labor report has been resolved.
14. The Total Cost column on the Line Items grid of the Estimates form is now automatically updated when you change any of the cost values on the hidden costing columns.
15. An issue with the Default State Zip Code filter dropdown box on the Company Setup form was resolved.

16. An issue with edited values not saving on the Projected VS Actual Grid has been resolved.

Version 7.1.3 (Previous Version Release)

1. An issue with the Rename Job utility has been corrected. In previous versions renaming a job would rename all jobs with the specified name rather than just renaming the job for the currently selected Customer.
2. An issue with an error message being displayed when you delete an appointment has been corrected. The error message no longer displays.
3. An issue with copying another user's permissions has been corrected on the Users form. In previous versions users could copy another user's permissions over the Admin's permissions. This could prevent the Admin from having access to the program.
4. A new permission for deleting Customers has been created. By default all users will still have the ability to delete Customers. If you would like to prevent specific users from deleting Customers you must set the "Delete Customers" permission to "No Access".
5. A new permission for deleting Estimates has been created. By default all users will still have the ability to delete Estimates. If you would like to prevent specific users from deleting Estimates you must set the "Delete Estimates" permission to "No Access".
6. **Hot New Feature** - A new Margins Grid has been added to the bottom of the Estimates form. This grid allows users to view cost, revenue, profit, profit margin, and markup percent values in real time as estimate line items are updated. This allows users to view important financial information as they are working on the estimate without having to view the Costing Reports. This should speed up the estimating process and help users be more profitable by allowing them to easily watch their profit margins. Note that users will not have permission to view the Margins Grid unless the "Display Cost Columns" permission is set to Read Only or Read/Write.

Version 7.1.2 (Previous Version Release)

1. The Contact Type of “Customer” is set by default when creating jobs on the Customers and Estimate Wizard forms
2. The QB Ready List no longer shows any packages in the lower grid until you select an estimate in the above grid.
3. An issue with the QB Ready List was resolved that was causing an error message to be displayed when certain Estimates were selected.
4. A new help link on the green screen that has steps to restart the SQL Server Service. This will assist some users who are having issues with SQL Server not automatically restarting when they restart their computer.
5. A new Estimate Total column has been added to the grid located on the QB Ready List.
6. The download link on the LICENSE form has been removed.
7. The issue with the appointments displaying duplicates when users change between calendar groups has been resolved.
8. The Sales Rep dropdown is now hidden when you select an existing customer on the Estimate Wizard.
9. If a user doesn't enter a quantity for any of the line items on the Estimates form, the user can now still apply a discount or markup percent.
10. The Rename Customer Utility and Rename Job Utility are now available when you select to edit a customer that has been sent to QuickBooks. Note that you are required to select Edit from the QB toolbar menu.
11. An issue with opening Customers from the Estimate List has been resolved.

Version 7.1.1 (Previous Version Release)

1. The Active check box on the Users form has been moved to the Users grid instead of the User's Preferences grid.
2. When creating new users on the Users form, their status will be set to "Active" by default.
3. The Estimate Wizard now includes the Sales Rep drop-down on the Customers tab.
4. The Estimate Wizard now properly links the current Sales Rep to the Estimate.
5. The Time Sheet information is now included on the Costing Reports which are accessible from the Estimates form.
6. Allpro Insulator automatically closes when you start installing an automatic minor upgrade.

The Minor Upgrade Details Report is now displayed when you start installing an automatic minor upgrade