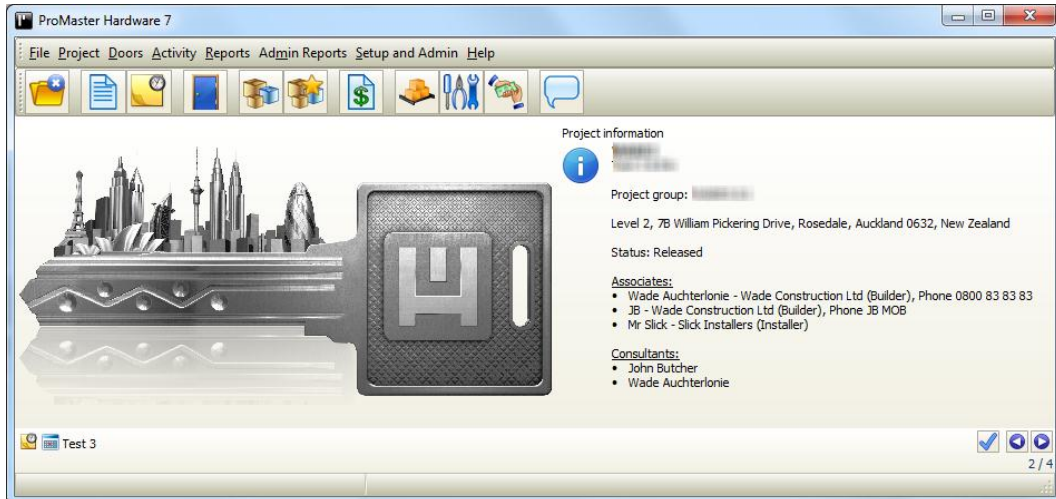# ProMaster Hardware 7
An introduction for ProMaster Hardware 5 users

ProMaster Hardware 5, released in early 2006 has become a familiar tool in the hardware supply industry. In those 7 years, it has been regularly maintained to meet the needs of the user base. However, the time has come to launch a significant new version with a multiplicity of new functionality.

So, welcome to ProMaster Hardware 7!

As a user of version 5, we want to give you an overview of what version 7 is all about without the need to read masses of documentation on the intricacies of every feature, so read on.

Overview

ProMaster Hardware 7 is a 100% rewrite. It was a big job! It has been written using the latest development tools and using the latest database engine. It sports a crisp clean look with a lot more functionality, frequent use of crisp clean graphics and all without introducing a confusing clutter of controls.

Conceptually it is substantially similar to version 5 so you won't need to throw out everything you know. Often we have tried to keep the general location of commands similar to where they were before so your time to be up and running will be short, allowing you to focus your learning on all the new functionality.

Windows compatibility

Designed for Windows 7, Windows 8, Windows Server 2003, Windows Server 2008 and Windows Server 2012, yet maintaining a high degree of compatibility with Windows XP and Windows Vista.

Backups

As you have come to expect, ProMaster Hardware 7 backups, once configured, run seamlessly keeping your data safe. Windows scheduler integration has been enhanced to work with Windows 7 and later security settings
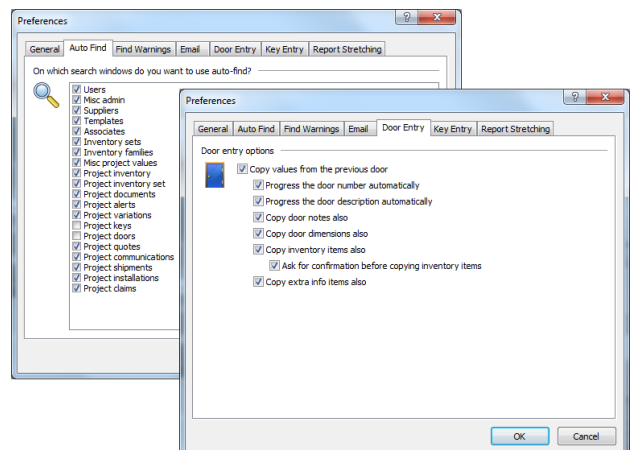
Preferences

From the handful of user preference settings available in version 5, there is now dozens of settings that allow the program to be tailored to each user.

For each type of data, users can choose if the data is returned automatically, "auto-find", or if a search must be performed first.
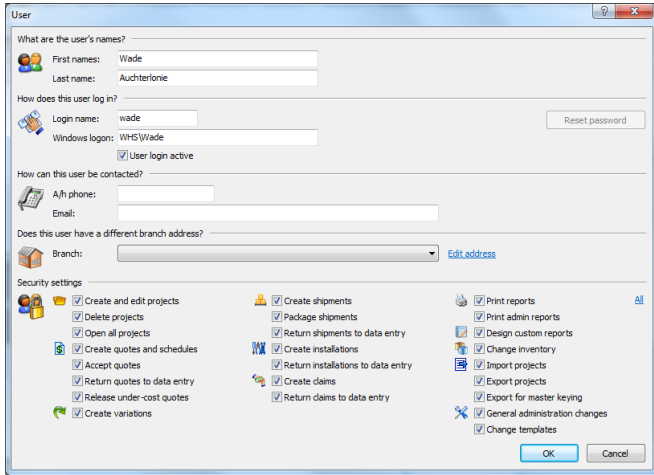
When adding doors, various options control how data is copied from one door to another and if this is to be done with or without a confirmation.

Report stretching options allow control over the appearance of wide pieces of data on reports to allow important data to take multiple lines and less important data to be truncated.

There is a variety of preferences for warnings, email settings, notifications and inventory images.

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Users

User permissions have been enhanced to allow for a more granular control over the "who does what" side of things.

Separate permissions are provided for exporting and importing projects, configuring templates (read about this a bit later) releasing quotes with under-cost items, changing inventory and of course various permissions for project related activities
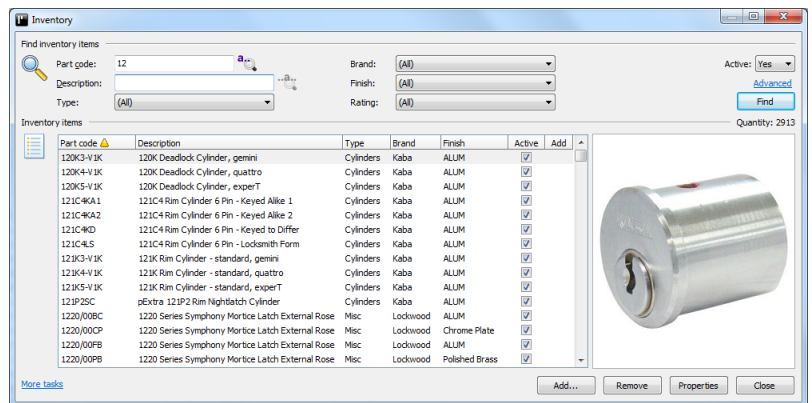
Active Directory / Windows login security

Corporate network administrators will be pleased to see the ability to integrate user login with Active Directory and Windows security. Now, not only is a user login able to be validated against your Windows security for single passwords, but any login restrictions and password policies on your domain are respected by ProMaster Hardware 7.

Searching

Everywhere you may search for information provides for searching using "Starting with" or "Containing" on each search field. When you change the way any search behaves, that setting is remembered for the next time you do the same type of search.

Search windows all contain a single "Find" button, and some windows, those that might return an unreasonable amount of data if you searched without entering anything to search for, give you a warning before doing the potentially time-consuming search. This is controllable in the new user preferences so you can turn it off if you have very little information in your database.

Search windows show you how many items are returned and additional operations are available by right clicking on the list of results and also by clicking the "More Tasks" link at the bottom left of the window.

Bits and pieces

Settings learning

As well as the search settings that remember your choices so they are the same next time you use them, all resizable windows remember their size and positions between use.

All sorts of other windows, notably those for printing reports where you have many choices will remember your choices for future use.

Project locking

ProMaster Hardware 7 implements a locking mechanism on projects to protect the data integrity and ensure that critical changes are performed with exclusive access being acquired before the change (e.g. creating a quote) and released when the operation is complete. Tools are provided to show who has a project open and what type of data they have locked.
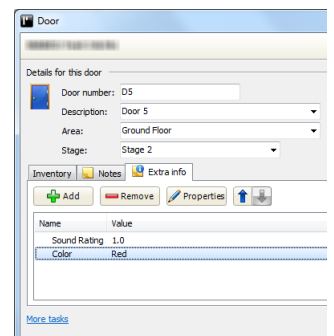
Hot keys

Hot keys or keyboard shortcuts are available for many tasks. Throughout the program, consistency of hot keys is used.

Storing additional data

Any amount of "Extra Data" may be stored against projects and also against doors. This allows you to have structured storage of data in "Name-Value" pairs. Extra data may be included in some reports (e.g. Project extra data may be embedded in a quote).
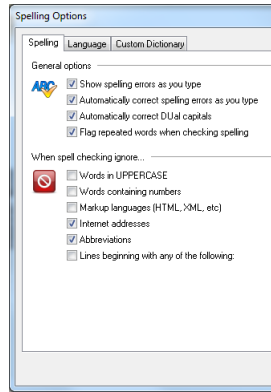

More tasks

Many windows have a more tasks link in the bottom left corner. Click on this to bring up a menu with additional functionality. Generally, controls are visible for the most common tasks, actions that pertain to a particular item such as that in a list of results from a search are accessible by right clicking on the item, and the "more tasks" link brings up a menu of more general actions.

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Spell checking, thesaurus and case conversion

ProMaster Hardware 7 has a world class spell checker and thesaurus to aid you in producing professional sounding documents.

Gone is the automatic case conversion from upper case to mixed case that version 5 offered. Now the case of text may be toggled between upper case, lower and mixed case on demand the same way as it is in Microsoft Word.
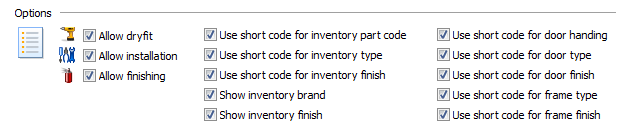
Product updates

Product updates will continue much as they always have for version 5, but with one useful difference. Now when installing the update you are told who is logged in, from which computer and a bunch of other stuff so you can have those users log out for the update.

New door classifications

In addition to "handing" and "door type", there is now "door finish", "frame type" and "frame finish" available for doors. Like "door type", the new classifications may be configured globally and also at a project level.

If any of the classifications are not defined for a project, they become unavailable when working on doors.

Lost projects

A new project status is introduced to categorise projects as lost, and allows for a "lost description" to be entered so you may refer back to previously lost projects and report on them to evaluate why projects are being lost – for example price, relationship or the project may have been just a fishing exercise.
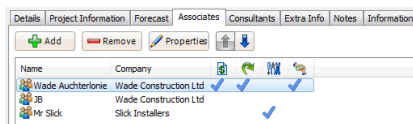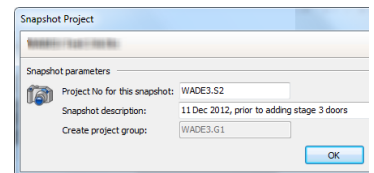

Projects

Project options

Project options control if dryfit, installation or finishing is available for the project. Turning off features hides them from project windows and reports.

Inventory brand and finish may be defaulted to off, and the use of short codes for project inventory and various other attributes may be set also. Default values for each of these settings are defined globally, so you should seldom need to alter them.

Associates

The associate database has been vastly improved, with a one-to-many relationship between associates and associate contacts, with the ability to specify addresses for associate contacts that override the main associate addresses.

When associates are added to a project you may specify if an associate is the default for a quote, variation, installation and claim, thereby allowing automatic selection of the correct associate when making quotes, installations etc.

Alerts

Project Alerts allow you to define bits of information that show at the bottom of the main window when a project is open. Alerts may be "show always" or set to appear after a particular date.

Archive projects

When changing a project status to complete or cancelled, there is an additional flag to mark the project as archived, thereby excluding it from project searches unless you specifically ask for archived projects.

Snapshots

Snapshots are an exact copy of the project, with the only change being a modified project number and a status of "snapshot".

Snapshots are read-only unless you change them to be an active project, giving you the capability to revert to a snapshot if subsequent project changes are not required.
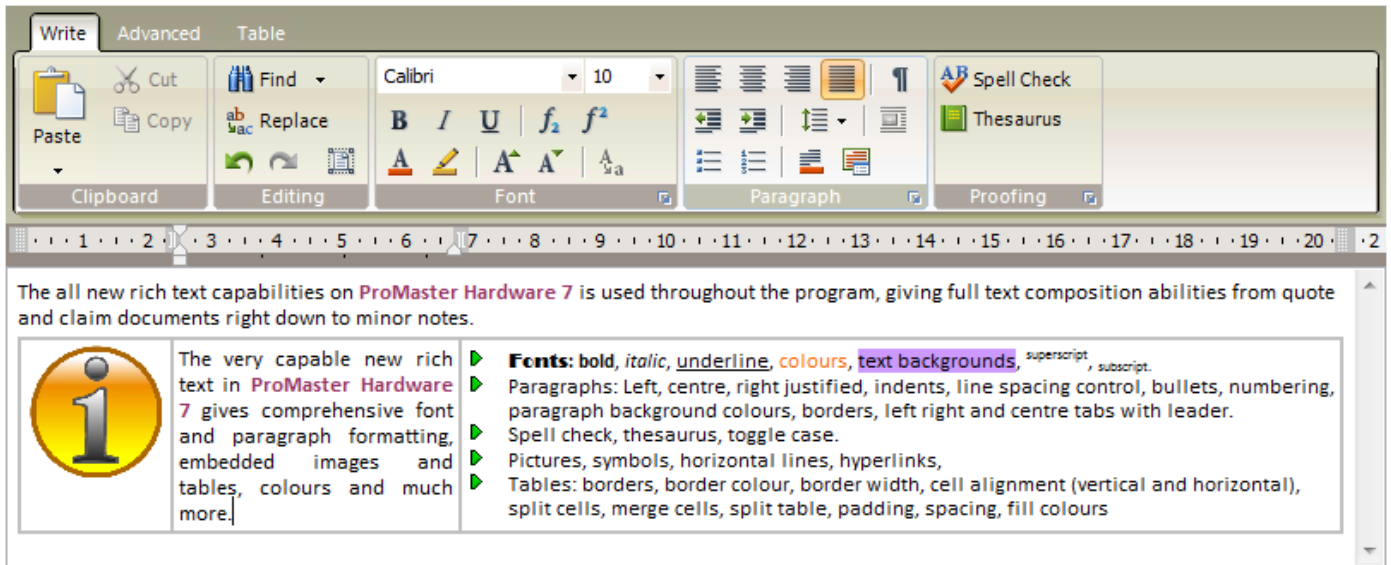
Consultants

Projects now allow any number of consultants so you maintain a trail of who has been involved in the project, with one consultant being designated as the main consultant.

Duplicate project

Much like version 5 you may duplicate a project for the purpose of making another project (e.g. you have made the full project and now you want a project with only the items for aluminium doors). The ability to select doors by door type is available and the process is now simpler. Because of project inventory default prices, any prices you specify are taken into the duplicate project.

Rich text

Pretty much everywhere where notes of any sort can be stored, the notes are stored using ProMaster Hardware 7's new rich text control. Now you have text composition capabilities comparable to those in a high-end word processor.

Short codes

Short codes have been added to various types of data (e.g. handing, door type, door finish) to complement the description. On a project by project basis you may choose whether the short code or the description is displayed, and the new legend report shows the correspondence between the short code and the description. This allows for meaningful unambiguous descriptions while allowing a short code to be used on reports to save on space. Short codes are available also for project inventory items – see the description of this under "Project Inventory".

Dryfit – introducing two-stage installs

ProMaster Hardware 7 introduces two stage installs. Stage one is called "dryfit", akin to a dry-run and the other is called "install" as it always was. Not all items require a two stage install. A typical example of two stage install is a mortise lock, which needs mortising as the initial stage and then fitting, frequently weeks later, as the final stage. The introduction of the dryfit allows the initial stage of the install to be quoted, installed, claimed and paid to the installer as a unit of work without waiting for the installation to be complete and without estimating the percentage of the job that is complete.

Project inventory

Like before, project inventory items can come from your global inventory database or be entered as project specific inventory items. Project specific items have been enhanced to add images and a few more fields previously available only to global items.
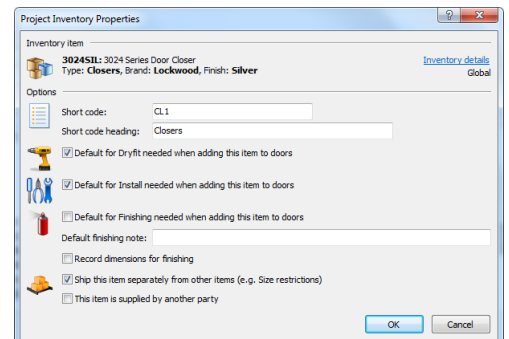
Short codes

Each project inventory item may be given a short code that can be used throughout the project, and also a short code heading to form a grouping of part codes when printing a legend report. Short codes may be used to mimic codes used by an architect or to obfuscate your real part codes during the tender process.
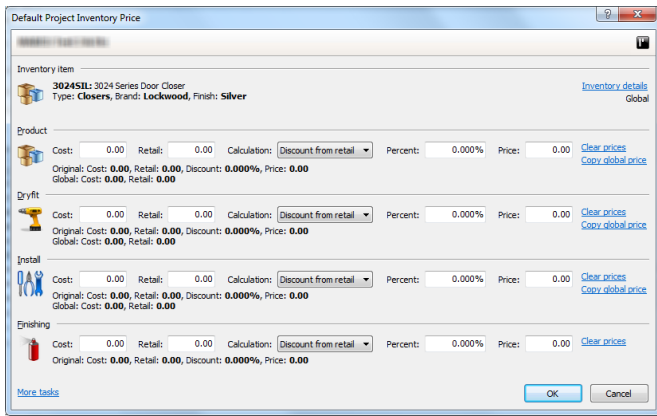
Sorting

Sorting of inventory items is no longer performed on a door by door basis. Project inventory items are sorted for the project and that sort order is used everywhere that the items are used, from doors to reports to quotes etc. Items may be resorted at any time, and the change is immediately reflected throughout the project.

Defaults

Each project inventory item has default for dryfit required, installation required, finishing required, if dimensions need to be recorded for finishing (e.g. kick plates), if the item is to ship separate from other items on the same door (e.g. closers) and if the item is supplied by others (you may be installing but not supplying the item).

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Default prices

Prices for items may be defined at a project level without the need to wait until a quote is created. These prices persist even when quotes are removed, and are used as the price when a quote is created. If prices are altered in a quote you may copy them back into the project default prices if you wish. Calculation percentages are now accurate to 3dp, resulting in more exact control over prices.

Add also

The capability to specify that some other items must be added to a door when an item is added is now available. The quantity of each of the other items may be specified.

Communications and documents

Communication storage has been beefed up and is now available from more places in the application.

Document storage is much more flexible, allowing documents to be linked to the project, or to variations, quotes, shipments, claims, installs, doors or communications. Many more file types are supported when adding a document from a file.

Graphics indicate that documents or communications are linked – in this example to quotes

Doors

Doors have rich text notes, extra user defined information, new classifications and like many other areas of the program have much greater field lengths (e.g. door number is 20 characters, description is 200). And like all areas of the program, all characters from all languages are supported!
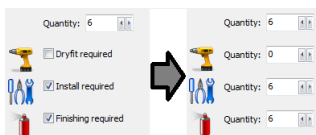
Adding doors

When adding doors, new preferences (see earlier) control how the copying of information from one door to the next is performed.

Door inventory

In this picture, the project is using dryfit, install and finishing so there's a lot to see.

Which options are available is determined by the options you select for your project. When items are added, the dryfit, installation and finishing flags are determined by the default for that inventory item that you have defined for the project.
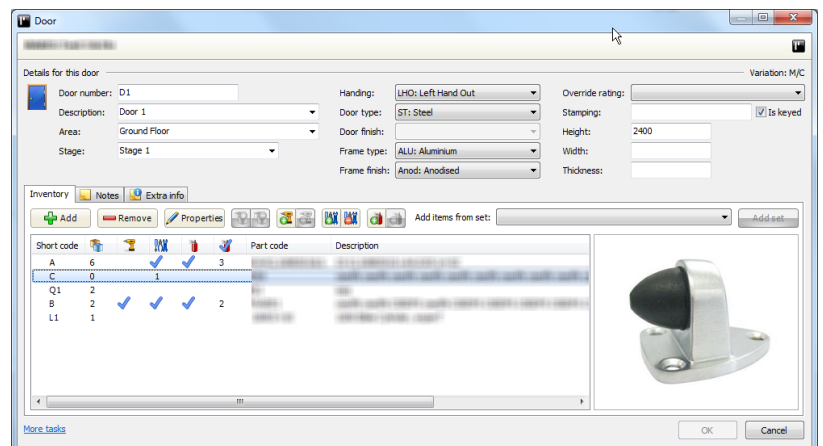
Advanced door inventory

Normally the quantity of dryfit, install or finishing tracks the product quantity so choosing dryfit, install or finishing is a yes-no choice. There is also an advanced mode that can be used on any inventory item that allows the quantities of product, dryfit, install and finishing to be adjusted independently (e.g. the product is supplied by someone else, but you are installing it).

Bulk change door inventory

The bulk change door inventory wizard has received a bunch of new functionality to remove the restrictions present in version 5 that limited what could be changed on a door.
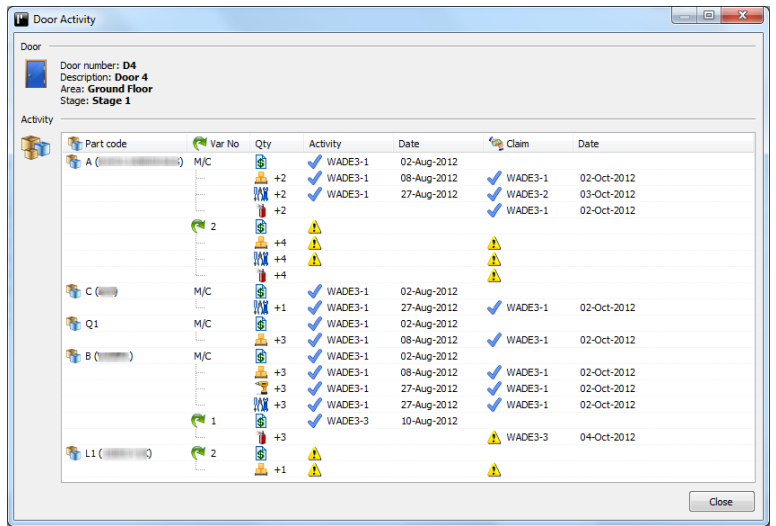
Door CSV imports

Comprehensive CSV import wizards allow you to bring in your door data and door inventory data from external sources, including making changes to existing doors and door inventory. Door inventory changes allow for product, dryfit, install and finishing and changes are automatically applied in the current variation.

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Door activity

For those times where you really can't see what activity has been happening on a door, the new door activity viewer shows every item, main contract and variation activity, quotes, shipments, installation requests and claims. Graphics give a quick visual indication of completed activities and those still or in progress or not performed yet.

Importing and exporting

Project import enhancements

When importing projects from other ProMaster Hardware 7 users, it is now much easier to control how inventory items are imported without mucking up your inventory database. The rules you define for how inventory is imported from other ProMaster Hardware 7 users is stored in the database and becomes available to any of your users performing an import.

CSV exports

Piles of export to CSV capabilities have been added, for parameter data, inventory, doors, door inventory, etc. Via the exports you may share data with others and also manipulated data externally (e.g. in Excel) the import it again to apply the changes.
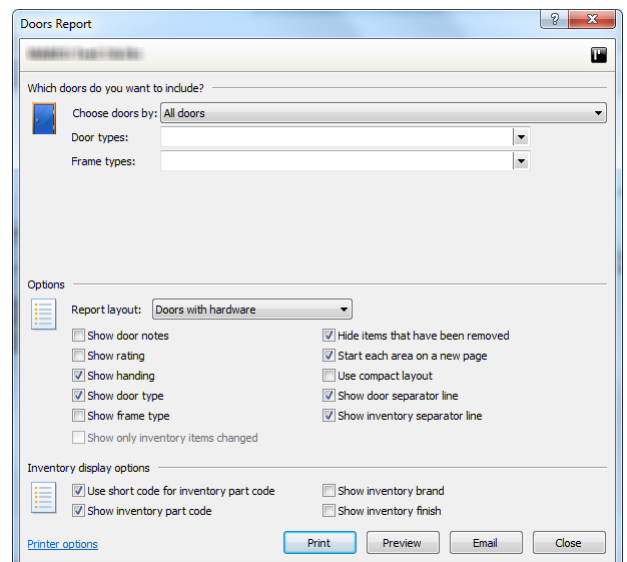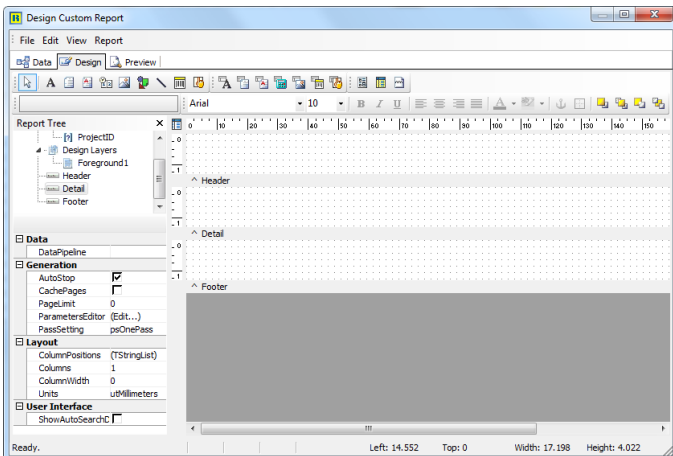
CSV imports

Pretty much all types of data may be imported from a CSV file, including making changes to doors and door inventory that will then be applied to the current variation. All imports are via comprehensive import wizards that step you through the process, verify the data being imported and ask questions about how to process the data.

Reports

Big changes in reports! Cleaner and more attractive report layouts with most reports having many more options for data selection and also what information is displayed on the report.

Numerous reports are available as both portrait and landscape. Reports dynamically rearrange themselves according to the types of data you have selected for display.

Duplex printing is supported as are advanced printer options. Various new reports have been introduced.

Custom reports

Shortly after ProMaster Hardware 7 is released the optional custom reporting module will be available. This allows users who license the custom reporting module to design their own reports. Reports are available in various contexts (Global, project specific, quotes, shipments, installations and claims).

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Quotes

There is a big change to the way the main quote document is produced – In version 5 it was produced from a number of text sections and also some prices, affording little control over the layout. Now, the entire document is produced from a template, using merge fields that are automatically populated with various pieces of information from the project, the quote and also from configuration information. It allows not only for individual pieces of information to be inserted but also for whole tables of data.

Since the document is formed using rich text (described earlier), you have virtually unconstrained control over the layout and content. Editing of global templates is controlled by security rights, and after bringing a template into a quote you may then tweak it, remove stuff you don't want or add new information.

Merge fields are available from a categorised selection list and there is a preview of the document to see how it will appear with the merge data.

Single PDF output

Now, when you email a quote, there is the capability to merge all reports produced into a single PDF document. Mixed portrait and landscape reports are handled with automatic page orientation changes.

Main contract quotes

Multiple main contract quotes may be produced for different associates, just like in version 5, but there is one significant difference – now main contract quotes must incorporate all doors, just like variation quotes. Quotes for a part of the project are now isolated by duplicating the parts of the project needing quoted then producing the quote in the new project. Through this mechanism the on-going project maintains its integrity and accurately reflects what was incorporated in the quote.

Shipments

Much like quotes, shipments provide for a cover document using a template with merge fields, and like quotes allow for merging all reports into a single PDF document.

Shipment types

In addition to standard shipments (where you send out product), there are two new shipment types – "negative quantity" and "zero quantity". The shipment type controls what may be added to the shipment and formalises the processes of returned goods and items that have been removed in a variation but were never shipped.

Shipment packaging

Shipment packaging has undergone a complete revamp, supporting worksheets for packaging, ship separate items and new data entry choices to record packaging prior to producing the shipment paperwork.

Report and labels

There're more reports and more labels, including door labels, package address labels and package content labels. Various label sizes are supported. Users who license the custom reporting module may design their own labels.
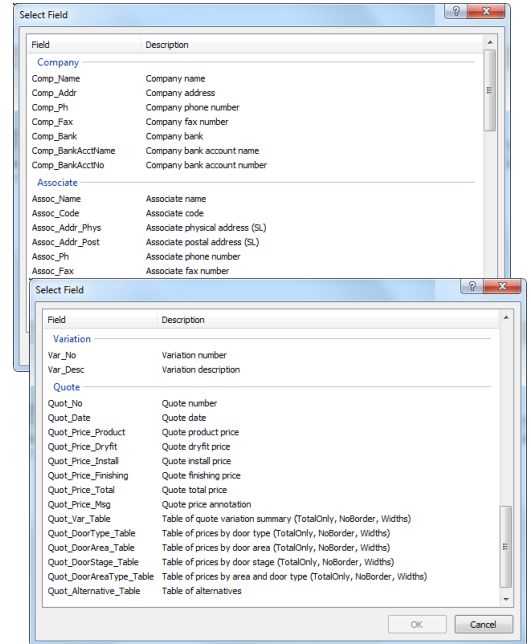
Finishing

Dimensioned product

Finishing dimension worksheets are produced for products requiring finishing (e.g. kick plates) and XML data exports are provided to allow for third party data recording solutions. Inputting of dimensions allows for position, width, height and thickness, tools for copying dimensions between items and importing data from an XML file.

Finishing instructions are produced with the dimensions, and also provides for XML outputs for machine integration. Labels are produced for marking finished product (e.g. stick onto protective film on kick plates).

Non-dimensioned product

Like version 5, finishing instructions are produced for non-dimensioned products that require special finishing.

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Installations

Much like quotes, installations provide for a cover document using a template with merge fields, and like quotes allow for merging all reports into a single PDF document.

Dryfit requests and install requests can exist on the same request, but are marked as complete independently.

Install types

Like shipments, uninstalls and zero quantity installs are formalised by producing three different types of installation requests.

XML data output and import

XML data outputs are available to convey the installation request to a third party field solution, and similarly the updated file may be imported to check off items where dryfit or installation is complete.

Marking as complete

Tools are provided to mark dryfit and installation as complete and a bulk change facility to rapidly mark items as complete.

Labels

In addition to the variety of reports for installation requests, two types of labels can now be produced – simple labels for marking each door, and also labels that mark each door and indicate what products to install.

Low-tack label stock is available from reputable label vendors which can safely be stuck onto doors, frames and painted surfaces without causing damage or permanent adhesion.

The install schedule report, which gives door by door instructions, can show the shipment, box and quantity in each box when the item was shipped, frequently eliminating the need to return to the shipment paperwork.

Claims

Like quotes, there is a big change to the way the main claim document is produced – The entire document is produced from a template, using merge fields that are automatically populated with various pieces of information from the project, the claim and also from configuration information. It allows not only for individual pieces of information to be inserted but also for whole tables of data.

You have virtually unconstrained control over the layout and content, and merge fields are available from a categorised selection list. There is a preview of the document to see how it will appear with the merge data.
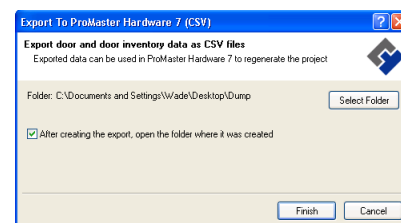
Claim install costs

The new claim install costs report tells you how much from the claim to pay each installer. No more guessing.

Upgrading from ProMaster Hardware 5

ProMaster hardware 7 does not upgrade your projects or data from version 5. Yes, that's right. During the software design process we identified a number of data requirements to support version 7 capabilities that do not exist in version 5 and could not be automatically generated. Additionally, projects have a limited life cycle so there is no significant disadvantage to running out old projects in version 5 and starting new projects in version 7.

Exports from version 5

For the situation where a project is in the tender stage, or possibly just won but with little or no activity, you may prefer to reconstruct the project in ProMaster Hardware 7. To support this, an update to version 5 has been produced that exports a bunch of files containing project data to aid you in reconstructing the project in version 7 and to import doors and door inventory. For a project without activity, the time to bring a project across is not too onerous.

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