

equip tutorial

Introduction

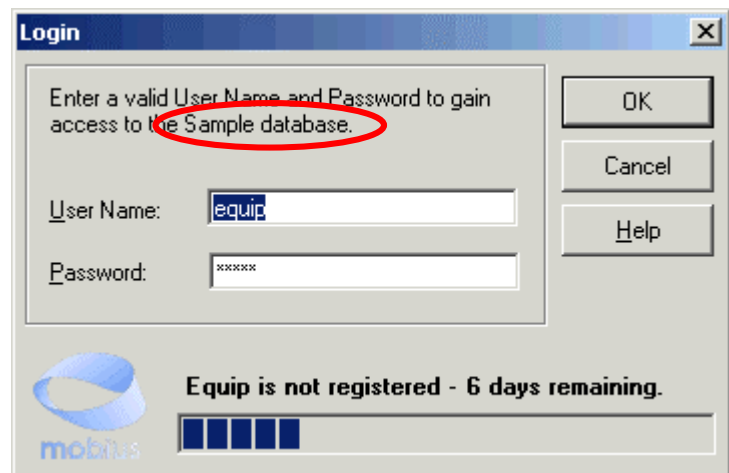
This tutorial is intended to quickly familiarise you with Equip's main features and assumes you are using the sample database (Sample.mdb) provided with the trial version of Equip. If you need further assistance refer to Equip's online Help (click on the Help menu, or press the F1 key for context sensitive help).

Log in to the system

When you start the system or open a database, you will be required to log in to the system. If you are using the trial version of Equip, the User Name and Password for the sample database will have been entered for you. If this is not the case, enter 'equip' for the User Name and 'equip' (lowercase) for the Password.

Click on the 'OK' button to continue or click on the 'Cancel' button to exit Equip, without logging in.

Tip: Use the tab key to move from one field to the next.



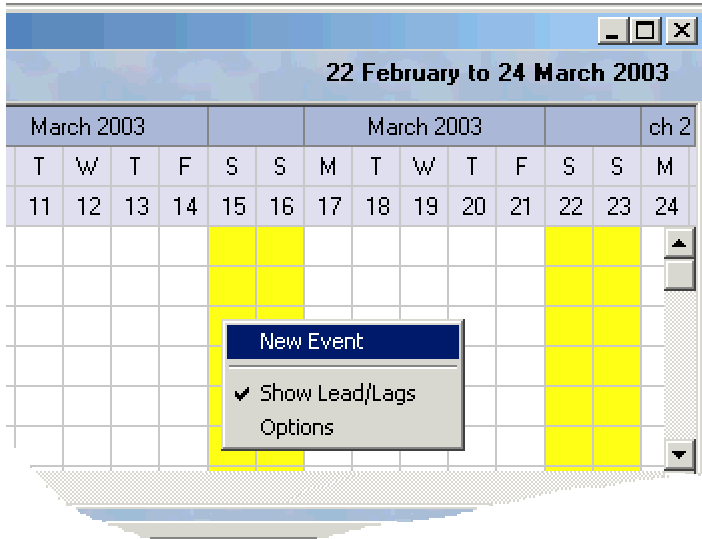
View the Diary and create an Event



Click on the View menu and select 'Diary'. The Diary window will be displayed.

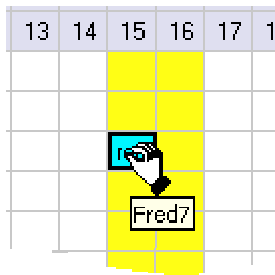
Position and resize the Diary window as you wish.

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Move your mouse pointer to any row in the Diary grid and to the column representing the start date of the event.

Click the right mouse button to display a popup menu – shown in the screen shot on the left.



Click the 'New Event' option to create a new Event. The Event will be displayed as a 'time bar' that represents when the Event starts and ends.

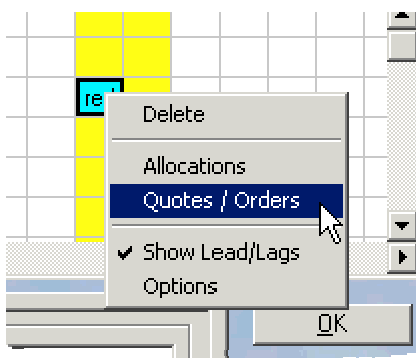
The 'hand' cursor indicates that you may click and drag the Event time bar to a different position on the Diary.

When you place your mouse pointer over a time bar and click the mouse, the time bar's Event details are displayed in the panel below the Diary grid.



If you move the mouse pointer to the edge of the time bar you will see a 'resize' cursor. Click and drag the mouse pointer to resize the time bar.

Create an Order



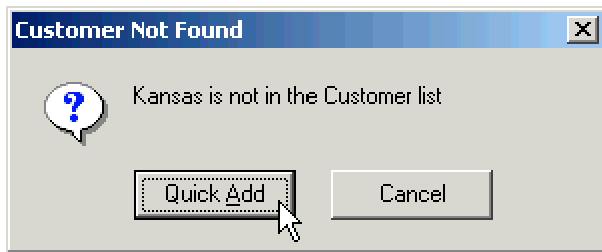
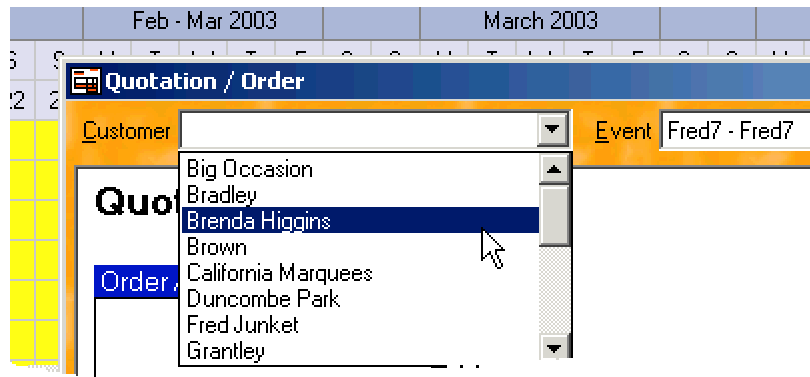
Click the right mouse button on an Event time bar to display the Event's popup menu.

Select the 'Quotes / Orders' menu item to display a new Quotation window.

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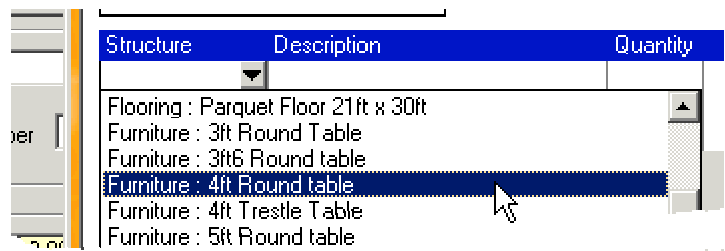
Click the 'Customer' box to select the required customer.

If the customer does not exist, type in the new customer's name. When you use the TAB key or click to a different dialog box, a message is displayed, as shown below.



Click the 'Quick Add' button to add the new customer's name.

When you have specified a Customer, Event and Order Number, you may proceed to select a Structure for the first order line. A Structure may refer to one stock item, or a group of related items, e.g. 'PA System' may consist of a microphone, an amplifier and two speakers.



Click the 'Structure' box to view a list of Structures (one item or a group of items). Double click the required Structure.

In the example shown below the user has selected a Structure named '4ft Round Table'. This Structure contains one stock item ... a 4ft round table!

Structure	Description	Quantity	Price	SST	SST Amt	Amount	Al.
4ft Round	4ft Round table	1	4.75	S	0.83	4.75	?

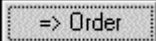
At this stage you can edit the order line to change the quantity, price and tax code (in this example SST – State Sales Tax). The tax codes are set up separately to represent different rates of tax.

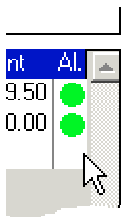
The following screen shot shows the situation after adjusting the quantity on the first order line, and after adding a second line with a Structure called 'PA System'.

Structure	Description	Quantity	Price	SST	SST Amt	Amount	Al.
4ft Round tab	4ft Round table	2	4.75	S	1.66	9.50	?
PA System	PA System 100 watt inc mic and sp	1	150.00	S	26.25	150.00	?

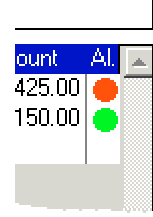
When you have entered all the order lines you require, click the 'Apply' button to save your work.

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Change the Quotation into an Order by clicking the  button.



The message 'Updating Allocations ...' will be displayed. This indicates that the system is calculating and allocating the stock required for this order. This process ensures that you do not over-allocate stock to events. Over-allocated stock is signalled with red or orange traffic lights.



View stock allocations & resolve shortfalls

To view the stock allocated to this Order / Event in more detail, click the  button.

Item	From	To	Allocated	In Use	Stocked	On Or...	Shortage	Surplus
4ft Round table	14/03/2003 12:00	16/03/2003 12:00	300	100	15	0	385	
Lighting tripod stands	14/03/2003 00:00	16/03/2003 12:00	2	0	6	0		4
Microphone	14/03/2003 00:00	16/03/2003 12:00	1	0	4	0		3
Microphone MR228	14/03/2003 00:00	16/03/2003 12:00	1	0	2	0		1

The Allocations window shows each stock item allocated and indicates whether there will be a shortage or surplus of each item during the Event. Highlight an item in the top panel and the bottom panel will show which other Events that item is being used on at the same time.

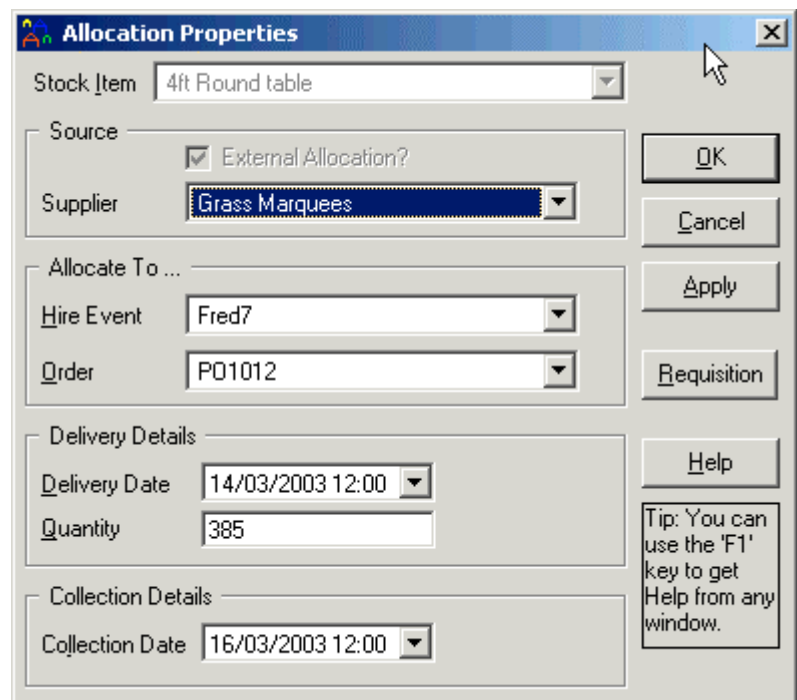
Allocation details for 4ft Round table										
Event	Order	Line	Structure	So...	Allocated	On Or...	From	To	Delivery Date	Collection Date
Fred7	PO1012	1	4ft Rou...	CF	300		14/03/...	16/03/...		
Fred8	PO1013	1	4ft Rou...	CF	100		14/03/...	16/03/...		

Total Allocated: 400 Stocked: 15 On Order: 0

To resolve a shortage you may click the 'New' button to create an 'External Allocation'. This is a Purchase Order or Requisition for items, to be supplied by another depot, or by an external company.

Adjust the quantity, delivery and collection dates as required. Click the 'Requisition' button to print a Requisition for the items – this can be faxed or emailed to the supplier.

When completed, click 'OK' to return to the Allocations window.



Allocation Properties

Stock Item: 4ft Round table

Source: External Allocation?

Supplier: Grass Marquees

Allocate To ...

Hire Event: Fred7

Order: PO1012

Delivery Details

Delivery Date: 14/03/2003 12:00

Quantity: 385

Collection Details

Collection Date: 16/03/2003 12:00

Buttons: OK, Cancel, Apply, Requisition, Help

Tip: You can use the 'F1' key to get Help from any window.

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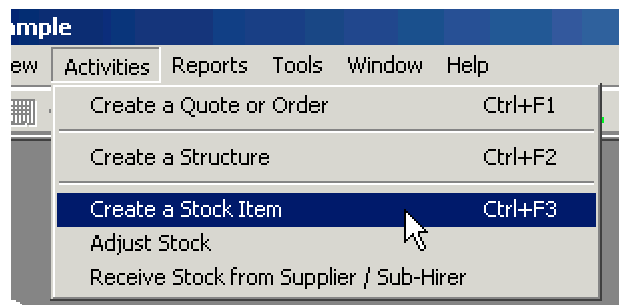
Allocation details for 4ft Round table										
Event	Order	Line	Structure	Source	Allocated	On Or...	From	To	Delivery Date	Collection Date
Fred7	P01012	1	4ft Rou...	CF	300		14/03/...	16/03/...		
Fred8	P01013	1	4ft Rou...	CF	100		14/03/...	16/03/...		
Fred7				Grass Marquees	385		14/03/...	16/03/...	14/03/2003...	16/03/2003 1...

Total Allocated: 400 Stocked: 15 On Order: 385

The new 'External Allocation' is displayed as a third row in the item details panel. The over-allocation has now been resolved.

Create a new Stock Item

Click on the Activities menu and select 'Create a Stock Item'.



The screenshot shows the 'Stock Item Properties' window. The 'Stock Item' field is set to 'Umbrella'. Other fields include 'Description' (Umbrella), 'Manufacturers No.' (xyz123), 'Unit of Issue' (Single), 'Unit of Purchase' (Single), 'Category' (Ans), 'Warranty Period' (empty), 'Cleaning Requirements' (Use soap and water), and 'Item Weight' (1.00).

Enter a unique name for the new Stock Item, a meaningful Description and optionally the Manufacturer's Reference Number. Leave the Unit of Issue and Unit of Purchase as 'Single'.

Specify a Category, e.g. for a table or chairs the category would be 'Furniture'.

If either the units or category do not exist you will be prompted to set them up.

You may optionally enter a Warranty Period, Cleaning Requirements, the Item's Weight and Lifting Requirements.

Notice that the 'OK' and 'Apply' buttons are not enabled at this stage. This is because you have not entered all the necessary information.

To complete the process of creating a Stock Item, click the 'New' button to display the 'Local Item Properties' window. This window allows you to enter details for the stock item at one location / cost centre.

Enter the quantity of the item stocked and optionally the other properties shown.

When you have finished, click 'OK' to save the local details and return to the 'Stock Item Properties' window.

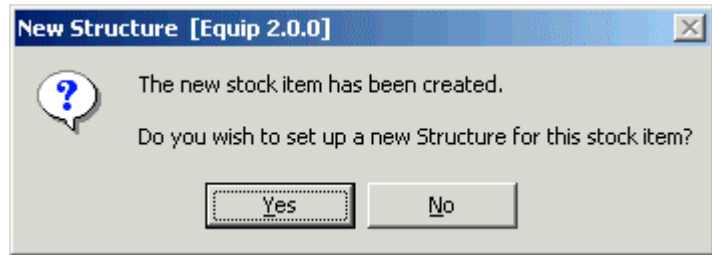
The screenshot shows the 'Local Item Properties' window. The 'Stock Item' field is set to 'Umbrella'. Other fields include 'Cost Centre' (CF), 'Local Bin Number' (Lower Shelf, Room 2), 'Minimum Stock Level' (10), 'Reorder Quantity' (5), 'Purchase Cost (£)' (5.66), 'Purchase SST Code' (S), 'Quantity Stocked' (10), 'Total Value (£)' (56.6), and 'Last Stock Check' (08/03/03 20:21:55).

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If you stock this item at more than one location you may now click the 'New' button again to add the local details for a second location. Each location is identified by a unique 'Cost Centre' code.

When you are ready click 'OK' to save the stock item. At this point the message on the right will be displayed.

Click 'Yes' to create a new Structure for the Stock Item.



Create a new 'Structure'

A Structure may consist of one Stock Item, many different Stock Items, or a combination of Structures and Stock Items. When you create an Order you specify the Structures required, Equip then calculates the individual Stock Items needed. Refer to the online Help for more information about Structures.

Note: You may create a new Structure at any time by selecting 'Create a Structure' from the Activities menu.

Enter a unique name for the Structure and a meaningful Description.

Specify the other properties as shown on the left.

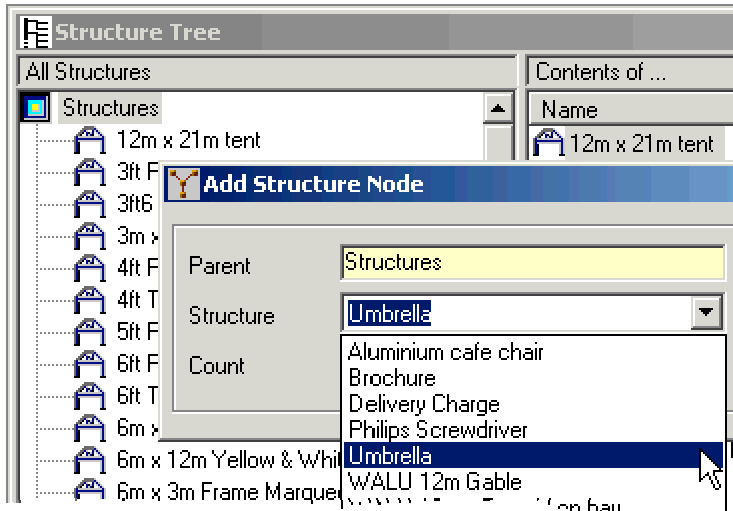
If the Structure Category does not exist you will be prompted to add the category.

When you have finished, click 'OK'.

Note: If you are creating a new Structure in response to the message displayed when you save a new Stock Item (see screenshot above), the steps in the next section of the Tutorial will be completed automatically by Equip.

Link Stock Items to a Structure

The 'Structure Tree' is used to link Stock Items to a Structure. These links are used by Equip when calculating the Stock Items to be included on an Order.



Select 'Structure Tree' from the 'View' menu.

Highlight the top item in the Structure Tree, named 'Structures'.

Click the **Add Structure Node** button.

Select the new Structure you created earlier in the tutorial from the list in the 'Structure' box.

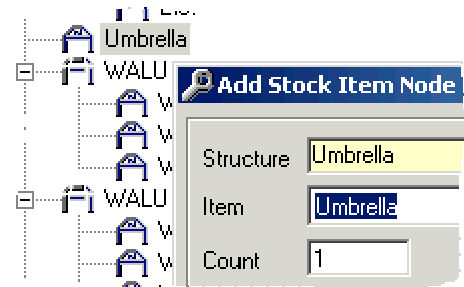
Click 'OK' to close the window.

Highlight the new 'Structure Node' that you have added to the 'Structure Tree' – 'Umbrella' in our screen shot.

Click the **Add Stock Item Node** button.

Select the Stock Item to be included in this Structure.

Click 'OK' to save and close the window.



You should now have successfully created a Structure, added it to the Structure Tree and informed Equip that it consists of just one Stock Item; an 'Umbrella' in our example. Now, If you specify the Umbrella Structure on a customer's Order, Equip will know that it consists of just one Umbrella.

This example shows the simplest type of Structure. Often a Structure will consist of many items, thus saving a lot of effort when you create Orders. **Also, remember that you will only need to set up a Structure once, but you will refer to it again and again when you create Orders.**

Next Steps

Equip has some powerful features, usually only found in more expensive systems. To gain an understanding of all its capabilities we recommend that you read the online Help and experiment with the sample database. If you need answers to specific questions, refer to the Frequently Asked Questions (FAQ) section of our web site (http://www.mobius-it.com/equip_faq.htm), or send an email to support@mobius-it.com.

Thank you for using Equip.