

**EMCO**

**Qplus II Manual**

**A Contractor's Catalog, Quotation and Purchase Order System**

# EMCO Qplus II Manual

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## 1. Introduction

The EMCO Qplus II system is provided to you by EMCO to help you with your business. Basically the system contains a computer catalog of the EMCO products, that functions with a Quotations and a Purchase Order program.

We hope that you find the system to be a valuable asset to your business. If you have any suggestions as to how we could make it better, we would like to hear from you.

## 2. Installation instructions

### **Warning !!!**

**Do not load this program into your computer if you already have Access 2000 installed. For some strange reason Microsoft designed their systems in such a manner that Access 97 programs cannot run on a computer that has Access 2000 present. If you wish to install Qplus II in this kind of situation you must uninstall the Access 2000 program.**

To load the system and the EMCO catalog do the following:

1. Put the CD in your CD ROM drive
2. The CD contains three files to process they are:

- \program\setup.exe
- \EMCOLocal\Setup.exe
- \EMCOBook\Setup.exe

From the computer start button select run for all of these files and they will self install, including the assignment of an Icon on the desktop. In the case of the EMCOLocal and the EMCOBook files you will be asked to select your particular region. Only select one region or you might have conflicts.

## 3. System Requirements

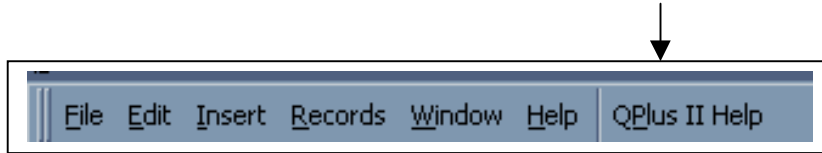
To run the Qplus II you will require a computer with Windows 95, or 98, preferably 32MB of RAM and a Pentium processor. The Qplus II system is designed to function on a single user computer and is not designed to function on a network environment. Your Windows screen resolution should be set to 800 by 600.

The programs and the EMCO parts catalog will require approximately 50MB of hard disk space.

All price and database updates as well as subsequent programs revisions will be sent to you via the Internet so you will need an Internet account and a modem in your computer.

## 4. On-Line Help

At the very top of your screen you will see a notation Qplus II Help. If you double click on this notation the “On-Line Help” system will be displayed.



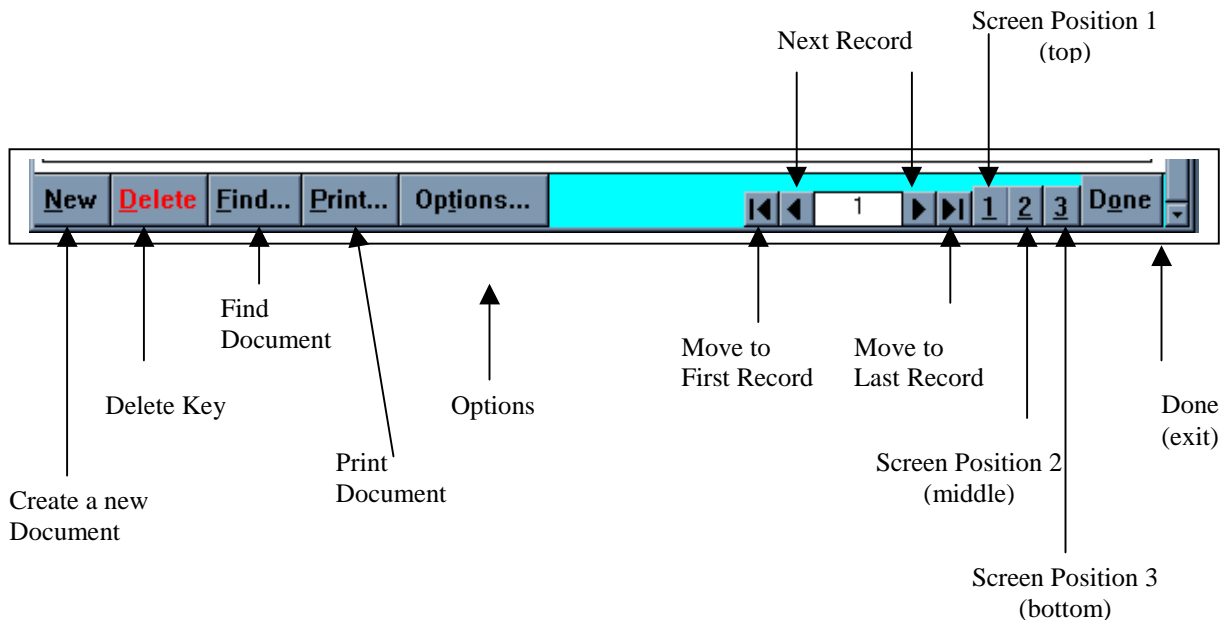
You can print out individual screens of the online help.

## 5. Screen & Keyboard Conventions

**Alt Key plus a Letter** – in many situations you can use the standard Windows keyboard convention instead of the mouse by pressing the Alt key and a letter that is displayed with an underscore

### Screen Position Keys (used in Quotations & Purchase Order)

The bottom of the screen displays the buttons shown below.



## 6. Using the EMCO Catalog

### Catalog Part Code Conventions

#### 1. Manufacturer's Codes

We have used recognized manufacturer's part codes where we can. For example the code for a RP70 Stainless Steel Ball assembly is RP70.

#### 2. Generic Material Codes

We have developed a numbering system that is designed to be easy for the contractor to use and to remember common codes for fast item selection. The codes that we have assigned for generic materials are as follows:

ABS	AB
Copper Pressure	C
Copper DWV	CD
PVC	PV
Black Malleable	BM
Galvanized Malleable	GM
Steel Pipe	SP
Black Steel Pipe Nipples	BSN
Brass Pipe Nipples	BPN

Common assigned coded for generic material items are as follows:

Elbows	E
90	9
60	6
45	4
22-1/2	2
Street	S
Tee	T
Cap	CAP
Union	UN
Coupling	CPL
Adapter	AD

#### Size code Convention

We have used a size number convention that is easy to use and allows the product to be displayed in an orderly manner on the screen. Basically we use the first character to be the inches and the second to be the number of eighths.

For example 4-1/2 would be 44

1-1/8 would be 11

A copper cap 2" would be CCAP20

A copper 2-1/2" copper 90 Elbow would be CE924

## **Using the Catalog Search Options–**

### **Chapter Search example**

1. Select the Price Book Tab.
2. Select the Chapter Tree button.
3. Select Chapter 12 Steel Malleable  
    Select Black  
        Select Standard  
            90 Elbow  
            Then sizes are displayed. Click on the Home button.
4. Select Chapter List button.
5. Enter Chapter number 12 and press enter
6. Select - Black, Standard Weight, Elbow 90 and the sizes are displayed. Click on Home to return to the Price Book Main screen.

### **Part code Search Example**

Select the Part Code button.

Enter BME90 and all the related parts are displayed. Press Home to return to the Price Book Main screen.

### **SKU Search Example**

Select the SKU button and enter the EMCO SKU (EMCO's own internal part code) 2351722 and the RP70 stainless steel ball assembly item will be displayed.

### **Search by Subject**

Select the Subject button. To find a Humidistat type in HUM and you will be taken to that point in the Subject listing. From there you can select a Humidstat.

### **Search by Manufacturer**

Select the Manufacturer button. To find Crane Valves, type CR and you will be taken to the Crane section then scroll down to Crane Valves and make a selection.

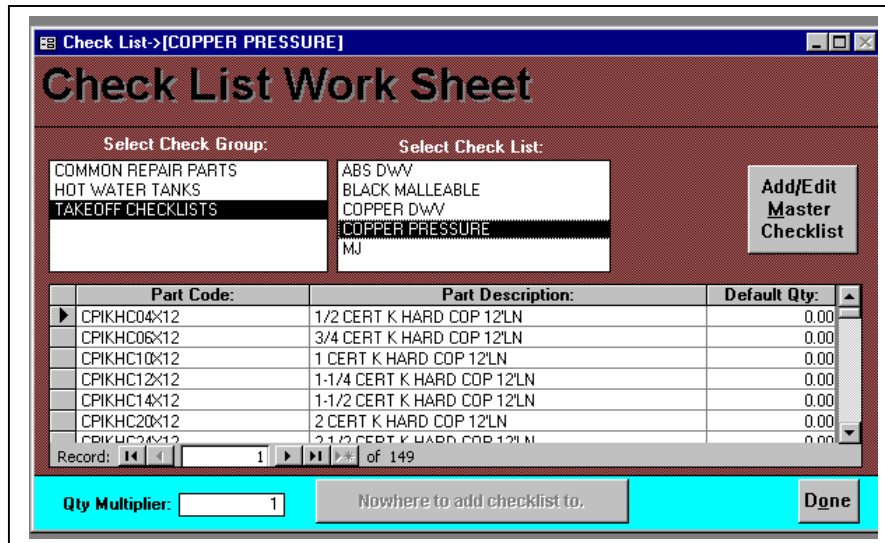
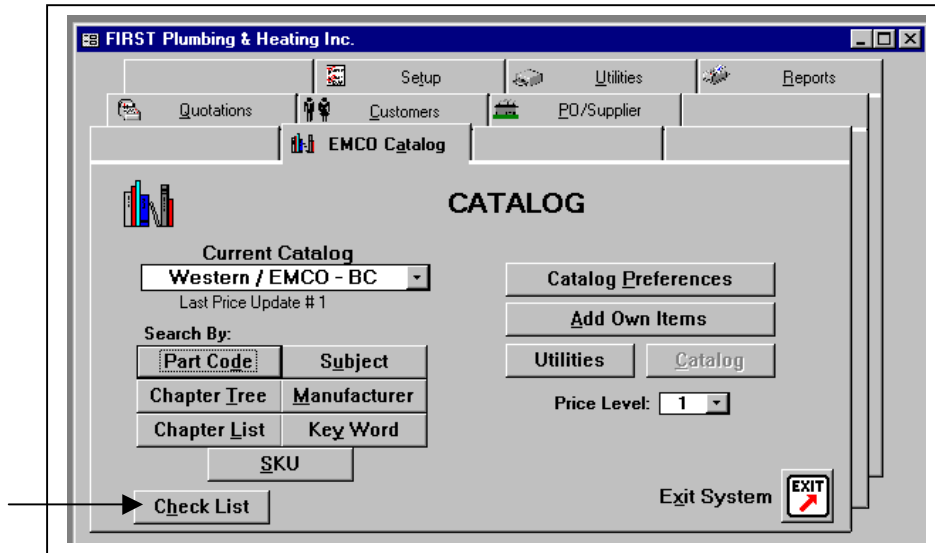
### **Keyword Search**

This is a way to search for words in the database. Because it must search every record this method is quite slow and it is a search of last resort. Type in the word HUMIDSTAT and all occurrences of HUMIDISTAT in the database will be displayed.

## EMCO Catalog Checklist Feature

The Catalog has a built-in checklist feature that is very powerful and is particularly useful in the quoting process where you can design your own system takeoff lists.

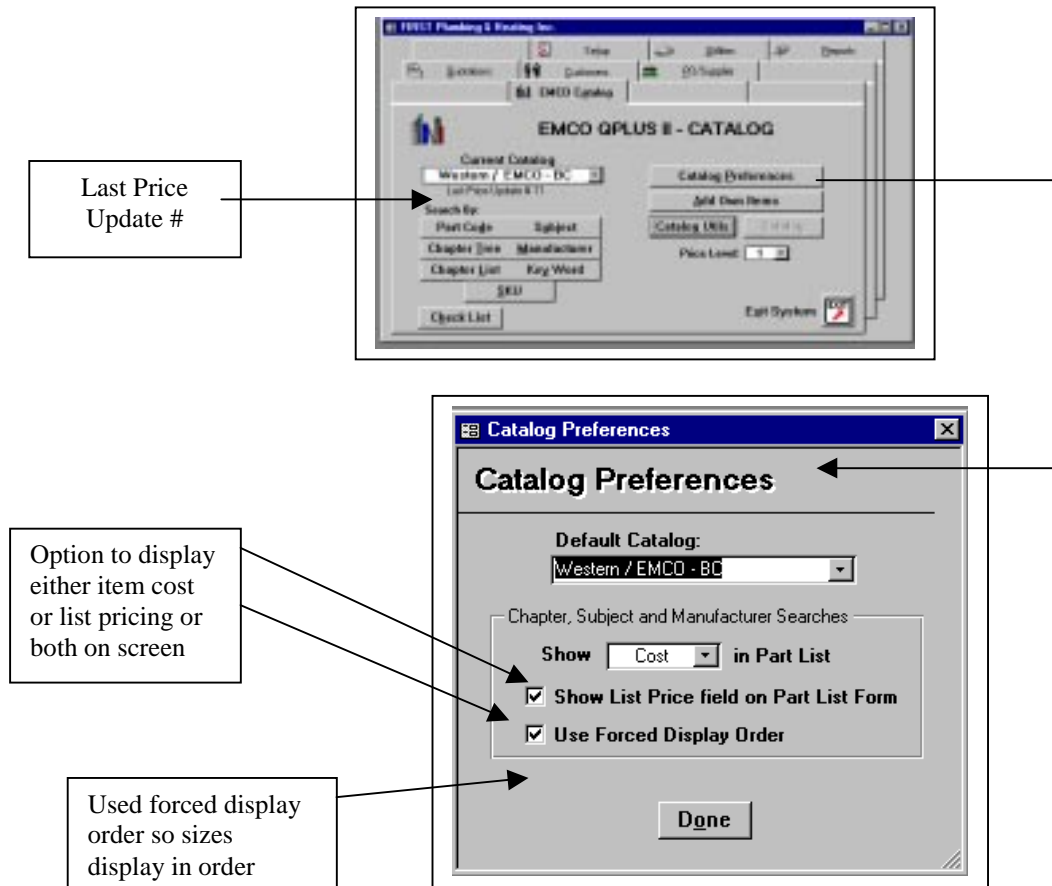
The Checklist is accessible from the main catalog screen.



To use the checklist you simply enter the quantities in the column on the right and the zero quantities will be ignored. You then click on the button on the bottom of the form and the items will automatically be written into your document whether a quote or PO. Using the Add/Edit Master Checklist button you can make and edit your own checklist by adding items into the checklist from the EMCO Catalog. One nice feature is that you never have to worry about keeping the checklist prices current. When the checklist feature is used it always uses the current system prices.

## Catalog User Preference Settings

Using the Preference Option feature shown below the user can set the way the Catalog displays certain information to suit your own operation.

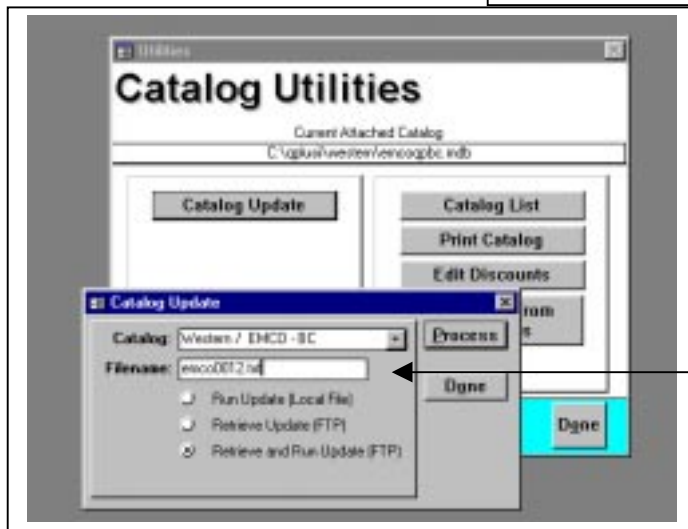
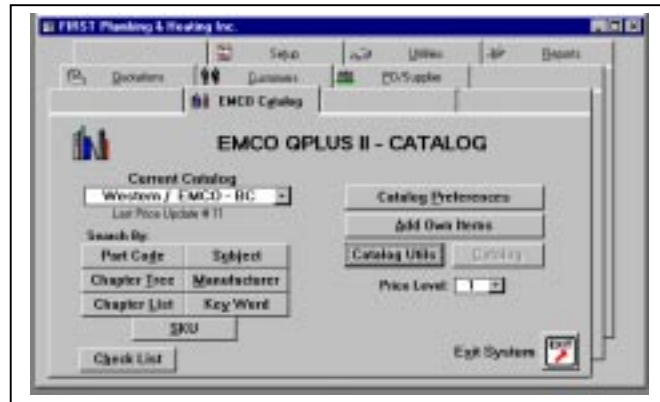


## Price Update Process

You will be advised by email of the latest price updates that are available. The price updates can be downloaded from the EMCO pricing option on **Price Book Services Web site at [www.pricebookservices.com](http://www.pricebookservices.com)**. Once the pricing update file is transferred into your computer go to the EMCO Qplus II Catalog Main screen and select the Catalog Util option button and you will be prompted for a file name to process. Each EMCO price update has been assigned a unique number so that you cannot process an update out of sequence. If you try to process a update file out of order you will get an error message.

On the main Qplus II Catalog screen under the selection box labeled Current Catalog you will see the notation "Last Price Update #". This will advise you of the last update that has been processed into your EMCO catalog.

Price Updates (continued)



Enter the price update file name to be processed

### Processing the “price update file” and creating your own costs

When you process the EMCO price update file all the list prices in your Catalog are updated but you will still have to process in your own costs. and you will be asked if you want to also update your system’s costs. Your costs are defined by taking the EMCO list price and multiplying it by your EMCO discount for that item. The item’s discount is held in the system Discount Table.

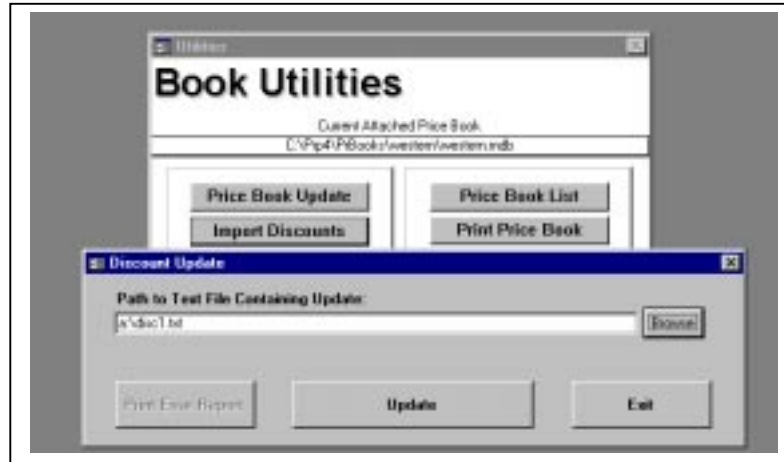
### Your EMCO Discounts

EMCO will send you via email a file as an attachment of your the discounts created specifically for your company. Then do the following:

- Select the main EMCO Qplus II catalog screen
- Select the Catalog Utils button
- Select Import Discounts
- Select enter the file name and process the data

If there are any processing problems they will be reported in the process log. After you have processed your discounts you will be prompted to run a program that will create you costs based on the system list prices and your own discounts.

## Discount Import Screen



When you process the file if there are any errors the error button will turn on and you can then see the error report on the screen and if you want to print the error report use the Windows print feature (File – Print).

## EMCO'S Discount Table File format

The file of discounts that you receive from EMCO will have the following format

### Header Record TYPE=DISCOUNT

#### Data

Item	Start Position	Number of Characters
Discount Code	1	5
Discount %	6	9
Date(yyymmdd)	15	8
Description	23	50

## Edit your Discount Table Values

From the Catalog Utilities Option Select the Edit Discount Table and then you can edit the table. The discounts by the Discount Category Code will be provided to you by EMCO. These same codes reside in EMCO's computer system. After you have edited the Discount Table you must then run the Process Supplier Discounts routine to update your systems costs based on the revised Discount Codes that you changed.

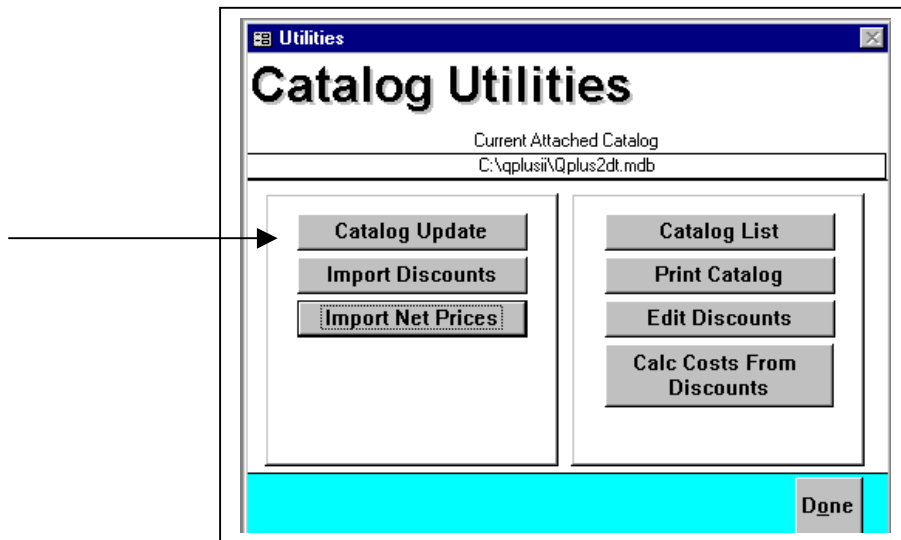
Discount Code	Discount Name	Discount 1 %
NT	NET PRICING	50.00%
A1	011 Copper Press Ftgs	50.00%
A1R	011 Refrig Copper Ftgs	50.00%
A4	014 Copper D/WV Ftgs	50.00%
A5	015 Flared&Comp Ftgs	50.00%
A5R	015 Refrig Flared&Comp Ftgs	50.00%
A7	017 Grooved Ftgs / E-Lets	50.00%
A9	019 Grooved Ftgs / JMA	50.00%

## EMCO Net Prices

EMCO will send you via email an attached file that contains your net prices created specifically for your company. Then do the following:

- Select the main EMCO Qplus II catalog screen
- Select the Catalog Utils button
- Select the Import Net Prices
- Select enter the net price file name and process the data

If there are any processing problems they will be reported in the process log. After you have processed your discounts you will be prompted to run a program that will create you costs based on the system list prices and your own discounts.



## EMCO'S Net Cost File format

The file of Net Costs that you receive from EMCO will have the following format

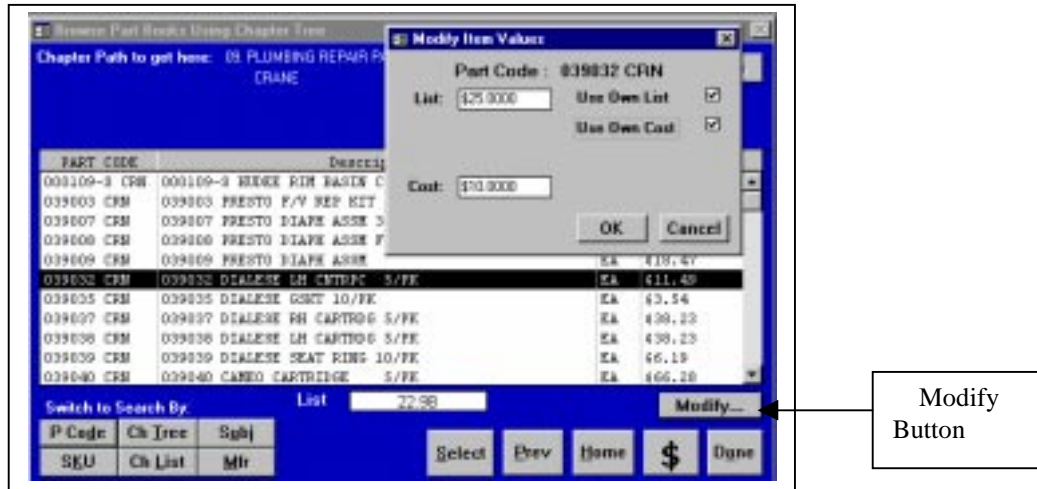
**Header Record** TYPE=NETCOST

**Data**

Item	Start Position	Number of Characters
SKU	1	25
Net Cost	26	11
Valid to date/time	37	18

## Modify Your Own Net Prices

You can enter your own net prices against items in the EMCO Catalog. To do this you bring up the item that you want to enter a net price for and press the Modify button and then enter your own net price value. Click on the Use Own Cost box so that future updates will not override your values. The same approach to flag the item can be used to enter your own list prices that won't be overridden by the EMCO price updates



## Your Own Labour Items

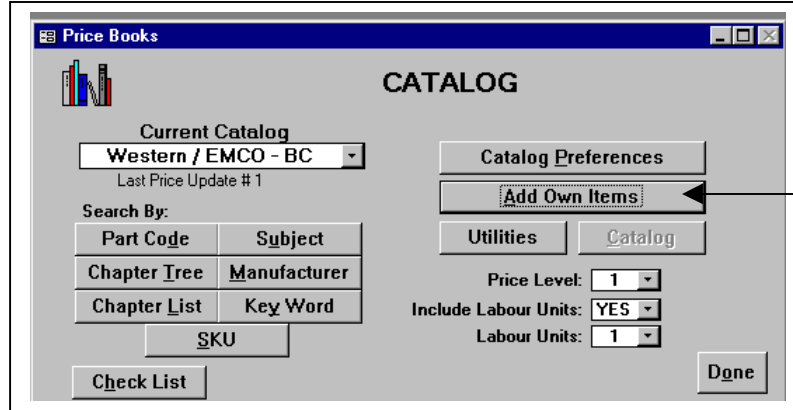
In your own Chapter section of the EMCO Catalog there is provision for your own labour items. Regular rate and Helper labour items have been included in the database (see below) and you can add more if you wish. You can change the cost and sell labour values by using the Modify feature outlined earlier.

The screenshot shows the 'Browse Part Books Using Chapter Tree' window in the EMCO Catalog software. The window displays the chapter path 'ZZ OWNITEMS' and 'Our Labour'. A table lists two labour items: 'Lab1 Labor Regular Rate' with a unit measure of 'HR' and a cost of '\$30.00', and 'Lab2 Labor Helper Rate' with a unit measure of 'HR' and a cost of '\$25.00'.

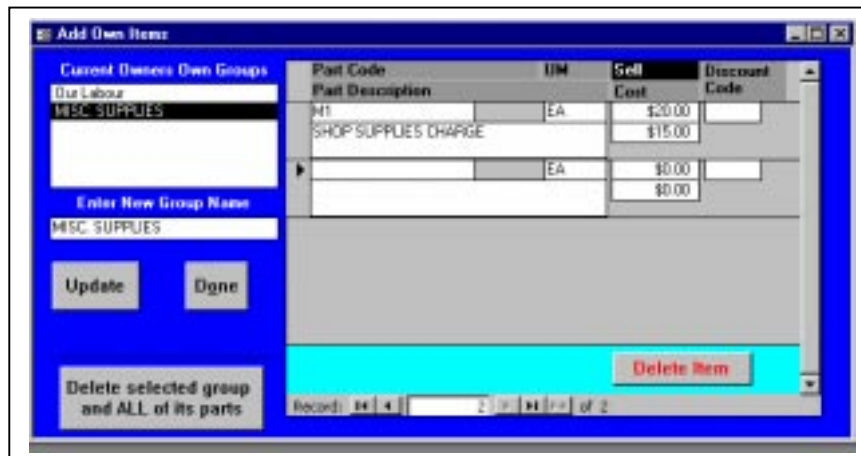
PART CODE	Description	UM	COST
Lab1	Labor Regular Rate	HR	\$30.00
Lab2	Labor Helper Rate	HR	\$25.00

## Adding Your Own items in the EMCO Catalog

The EMCO Catalog has provision for you to add in your own groups & items into Chapter ZZ – Your own items. In this chapter you can create your own groups and items within these groups. Naturally you will have to maintain your own prices. To add your own groups and items select the Add Own Items from the main Catalog screen shown below:



Shown below is the screen for entering your own groups and **your own items** into the EMCO Catalog. You can find these items through the Chapter – Group search or by using the Part Code search. Your own items will not appear in the Subject or Manufacturer search methods



## 7. Setting up your own company information

Select the Setup tab from the main screen. Then select company information and complete the company information as shown below:

**Company Setup**

Company Code: TEST

Company Name: FIRST Plumbing & Heating Inc.

Slogan: FIRST IN SERVICE

Invoice Contact: GREGG HELSON

PO Contact: TOM

Street: 550 Westbay St

Suite:

City State Zip Code: VICTORIA, BC

Phone/Fax Number: 250-475-6282 250-475-6273

E-Mail ID: first@intelplus.com

Fed Tax ID: 10347 8046RT

Customer Order:  Company  Name  Code

Customer Numbering:  None  Sequential (12345)

Ship To Customers:  Show All  Assoc with Bill To

Next select the QuotationsTab While in the Company Setup and change the following to suit your company.

## Quotation Setup Fields ( Company Setup Tab)

Set the Quotation Number method

Ship Via Table

Sales Person Names

Company Setup

Company Setup | Quotations | Purchase Orders | r/s | Messages

Quotation Numbering

None

Sequential [12345]

Date Sequence [999101-01]

Use Tasks on Quotations

Freight Table

Other Charges Table

Document Numbers

Default Customer: ABE INDUSTRIES INC - Head Office

Pricing Rules

Shipped Via:

Shipped Via

None

FedEx Economy

UPS Ground

Canada Post

Salesperson:

Salesperson

Don

Mike

Steve

Betty Anne

Type of Payment:

Type

Cash

Check

Visa

Sales Tax Rates:

<input checked="" type="checkbox"/> BC	7.90%
<input checked="" type="checkbox"/> GST	7.90%
<input checked="" type="checkbox"/> SK	8.90%
<input checked="" type="checkbox"/>	9.90%

Exist

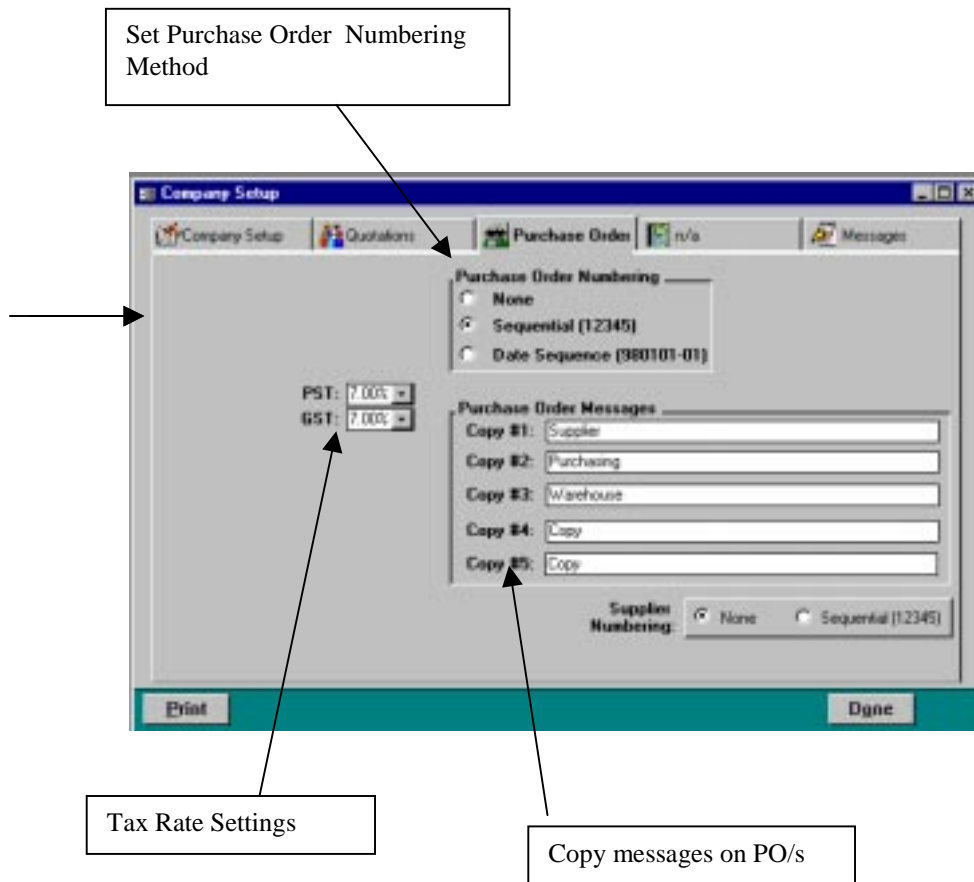
Done

Set System Pricing Rules List - D% Cost + Mkup

Set starting Quotation # & Purchase Order #

Tax Rate Table

## Purchase Order (Company Setup Tab)



## 8. Adding Your Own Customers to the System

You can add customers to the system from the Customer Screen by selecting the Customer Tab then select the Working with Customers Icon and then select the New customer button on the lower left, or from within the Quotation program you can click on the New Customer Icon to move to the new customer screen

The Customer data entry consists of two separate screens activated by a tag toggle on the top of the screen – the Customer Info tab and the Price Rules tab

A Typical Company Screens are shown below:

Customers

Quick Find: ABLE INDUSTRIES INC - Head Office

Customer Number: ABLE-HQ

By Company By Name By Cust #

Customer Info Price Rules

Address Type: Bill To Display Ship To Customers

Name: Mr./Ms. First Name MI Last Name ACTIVE

Company: ABLE INDUSTRIES INC - Head Office Region: VICTORIA

Street: 44 WILLIAM ST. Suite: 507/506

City: VICTORIA State/Province: VIC 383

Country: Zip/Postal Code

Phone: 556-1057 Other: CELL 250-807-5566

Fax: 250-864-5525 Email ID: able@tslandnet.com

Type of Customer: Comments: See May for all work order approvals. They usually buy all their Votsaki product from Andrew Street

Service

Quotations Letters Notes

New Delete Find... Print... Groups Done

Record: 11 of 5

Customer Price Rules Tab

Customer Info Price Rules

Sales Information:

Salesperson: JON

Sales Tax: 5% 7.00% 7.00%

Tax Exempt: Label Tax Exempt:

Pricing Rule Set: Let less 20%

Quotations Letters Notes

New Delete Find... Print... Groups Done

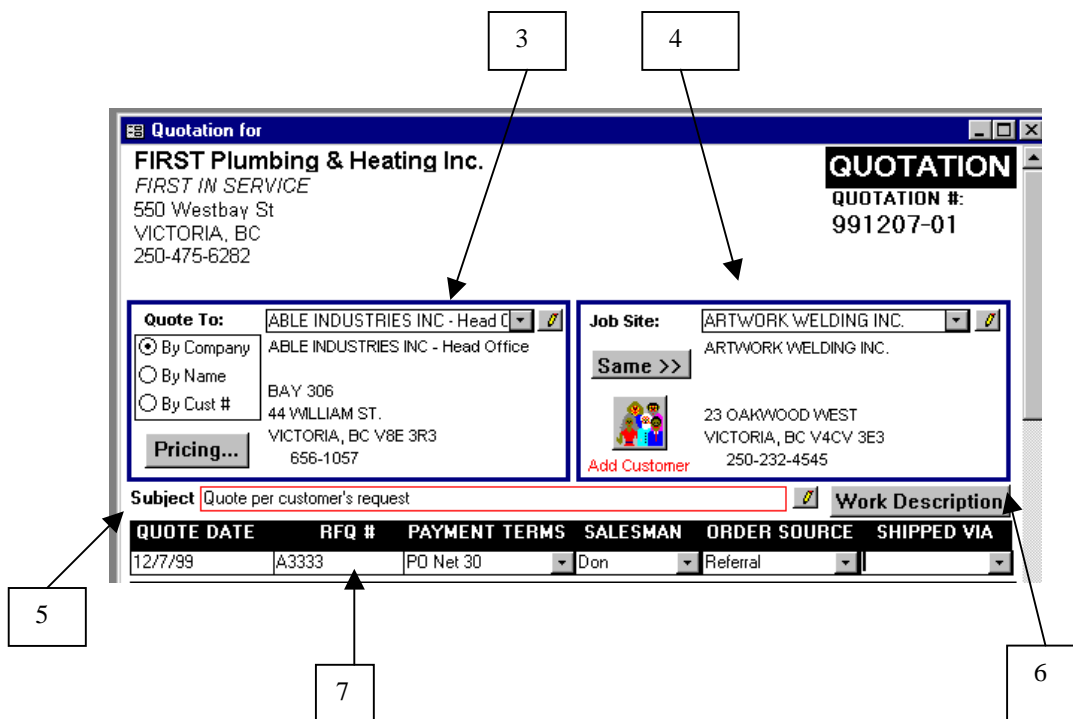
The following are some Notes about working with Customers in this System

1. Customers are classified as Bill To, Ship To (work site) or Both.
2. You can set the taxation and pricing rules within a customer's own file.
3. You can find customer by several search methods.
4. From the customer's record you can create letters and assign notes.
5. You can assign customers into your own groups.
6. You can assign Price Rules to any customer.

## 10.Steps to Make a New Quotation

To make a New Quotation you do the following:

1. Select the Quotation Tab
2. Select the New Quotations Button
3. Select an existing customer or add a new customer if required.
4. Select a Job Site location or add one if required.
5. Enter a subject for the Quotation
6. Complete a Work Description if appropriate
7. Complete the general information (date etc.)



## Quotation Tasks

You can separate your quotation in to tasks if you wish. The system has provision to store you common tasks that you frequently use or you can make up new tasks to suit the situation

The Task Selection section in the Quotation is shown below:



## Master Task List & Selection

The screenshot shows a window titled "Adding Tasks to Quotation #991207-01" with a "Master Task List" table. The table has two columns: "Task Name" and "Task Seq. #". The tasks listed are: OUTSIDE WASTE (Seq. # 1), INSIDE WASTE (Seq. # 2), ROUGH-IN (Seq. # 3), INSTALL FIXTURES (Seq. # 4), and FINISHING & CLEANUP (Seq. # 5). Below the table are buttons for "Add...", "Edit...", and "Delete". To the right of the table are buttons for "Add To Quotation >>" and "Done".

Task Name	Task Seq. #
OUTSIDE WASTE	1
INSIDE WASTE	2
ROUGH-IN	3
INSTALL FIXTURES	4
FINISHING & CLEANUP	5

Callout boxes provide additional information:

- "You can make your own Master Task List" (points to the "Add..." button)
- "This button adds the tasks for your quotation" (points to the "Add To Quotation >>" button)

Shown below is a set of Tasks selected from the master table

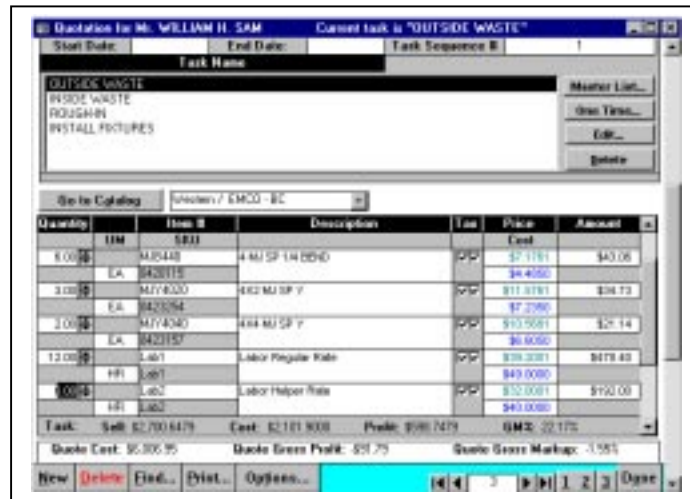
The screenshot shows a task selection interface with a list of tasks and buttons for "Master List...", "One Time...", and "Edit...".

Task Name
OUTSIDE WASTE
INSIDE WASTE
ROUGH-IN
INSTALL FIXTURES

### Adding Items into the Quotation

After the tasks are selected you can add items into the Tasks. Items can be added via the EMCO catalog (see the Go To Catalog Button) or as direct entry using the keyboard.

Shown below a task has been selected (Outside Waste) and items can be added into the task by moving to the EMCO Catalog (press the Go to Catalog button) or you can add ad hoc items by typing directly into the form (see the arrow below)

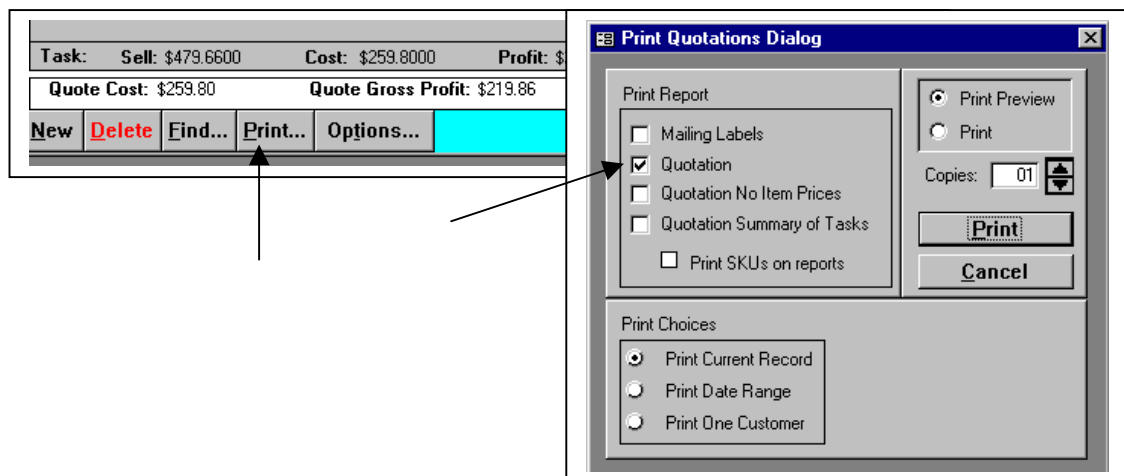


Note

1. In the above example items have been added into the task **Outside Waste** by using the EMCO Catalog. In each case the items cost and sell price have been written into the record.
- 2 The user can go into the document and edit the quantity, price and the cost.
- 3 The task total values are displayed on the bottom of the screen
- 4 To select another task click on one of the tasks in the upper screen

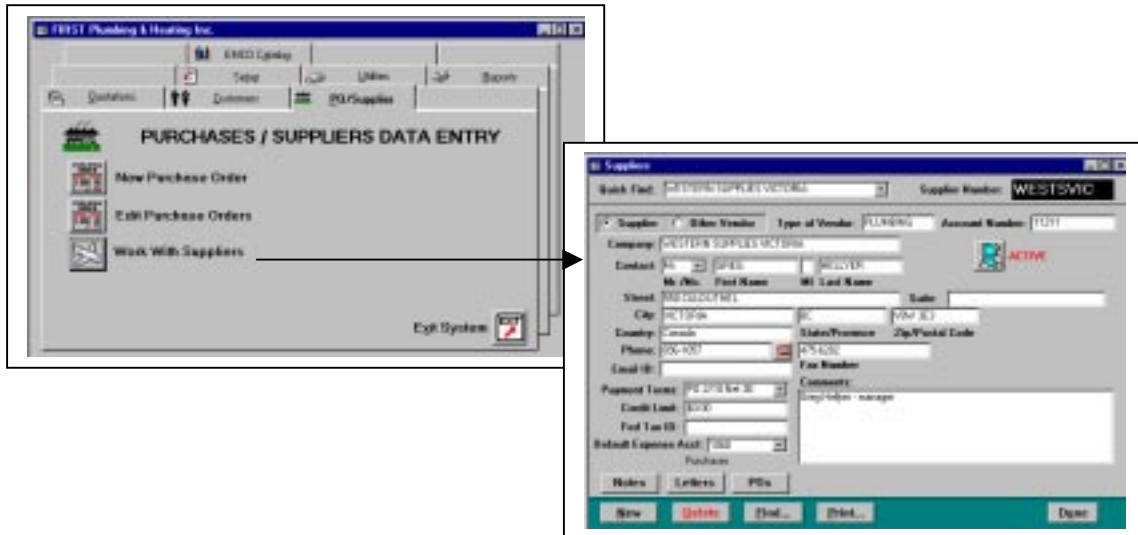
## Quotation Print

To print the Quotation select the print button on the bottom of the screen you the print dialog box will present several print options.



## 11 Adding /Editing Supplier Information

Select the PO/Supplier Tab, then select the Work With Suppliers Icon. You can enter as many suppliers as you wish. Each supplier must be given a unique Supplier Number (code)



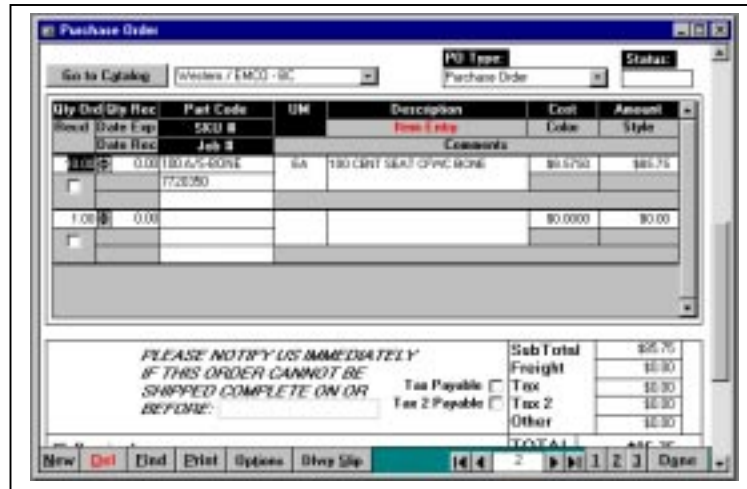
## 12.Steps to Make a Purchase Order

1. Select the New Purchase Order Icon on the Purchases/Supplier Data Entry tab.
2. Select the supplier you want to use or add a new supplier.
3. Select the Bill To and Ship To entries (usually your own company).
4. Enter a PO Subject.
5. Enter any Special Instructions that are required.
6. Complete the general information such as the PO date and required date etc.
7. Add items into the PO using the EMCO catalog, or direct item entry from the keyboard. You can also use the Options button to import items from a quotation into the PO.



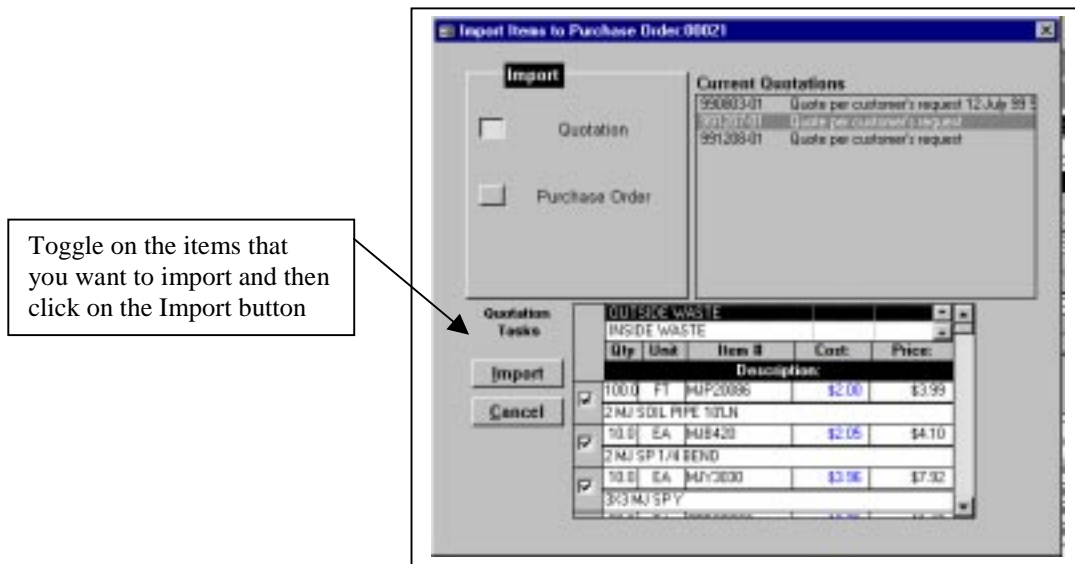
## Adding Items into the Purchase Order

Use the EMCO Catalog or add items directly



## Importing Quotation Items into a Purchase Order

1. Select the Options button on the bottom of the screen.
2. Select Import Into PO
3. Click on Quotation and select the quotation that you want to use and then select the appropriate task (see below)



## 13. Support

Email free support is available from Price Book Services ([prbook@islandnet.com](mailto:prbook@islandnet.com)). Telephone support is available from Price Book Services on a fee for service basis (\$ 15.00 per 15 minute call).

## **17. Other Available Programs from Price Book Services**

Price Book Services has a complete contractor's business system called PRICE-RITE PLUS that functions with Price Book Services version of the EMCO Catalog. This system has a variety of features including estimating, service billing, work order job dispatching as well as an accounting module. Users can use the Price Rite Plus system as an operational system front end and link to your present accounting system. For more information contact Price Book Services at 11391 W. Saanich Rd. Sidney, BC V8L 5L1 phone 250-656-1033, fax 250-656-1057 or visit their web site at [www.pricebookservices.com](http://www.pricebookservices.com).

## **15. System Tour using the demo data**

The system has been provided with a set of demonstration data that can be used for the guided tour outlined below. We would highly recommend that you view the tour before you start to use the system.

The following is a brief list of items that you might want to observe to get a quick idea of what features are contained in the system.

### **A. Customers**

1. From the main screen select the Customers tab
2. Select Work with Customers.
3. Select the Find button on the bottom of the screen.
4. Select ABLE Industries Inc. from the list of customers displayed.
5. From the Customer screen you can also view for the selected customer Quotations, Letters, and Notes, by clicking on the buttons on the bottom of the screen. For example for the currently displayed customer (Able Industries) click on the Quotations button, then click on the Quotations button, then click on Quotation #10 (then the selected line will turn black) then click on the Show button and then Quotation # 10 will be displayed (you can view the total Quotation by clicking on the screen position buttons 1,2,3 displayed on the bottom of the screen). Click on Done and you are returned back to the customer's screen..
6. Click on Work with Groups.
7. Click on Social Events
8. Click on Company Summer BBQ and all the member of the selected group are displayed.
9. Click on Done to exit.

### **B. Quotations**

1. Click on the Quotes tab
2. Select Edit Quotations
3. The most recent quotation is displayed ( #12)

4. Click on Work Description to view the work description then click on Done to exit the work description.
5. Click on Task “Supply only – Items Listed”.
6. Then click on the screen position 2 next to the Done button on the lower right.
7. The item that have been entered into the task is displayed.
8. From this screen you can directly type in an ad hoc item, or use price book items,by selecting the “**Go To Price Book**” button at the top of the screen to move to the EMCO price book.
9. Click on screen positon 3 button to move to the bottom of the Quote.
10. Click on the Done button to exit the Quotation. You might want to also view Quotaton #10 using the Find button on the bottom of the screen. Quotation #10 has more example tasks.

### **G. Purchase Orders & Suppliers**

1. Click on the main screen PO/Suppliers tab.  
Select Purchase Orders Edit and the last purchase order in the system will be displayed (#21).
  
2. You can view a Supplier by selecting the Supplier tab and the Emco Western supplier is displayed. From this screen you can add more suppliers of your choosing.