EQIC User Guide

EQIC

Estimation, Quotation, Invoice, Certification software

from

www.AllertonEPS-Software.co.uk

"Revolutionary software that transforms your Estimations, Quotations, Invoices and Electrical Certifications into powerful eye catching, clear, concise contract information."

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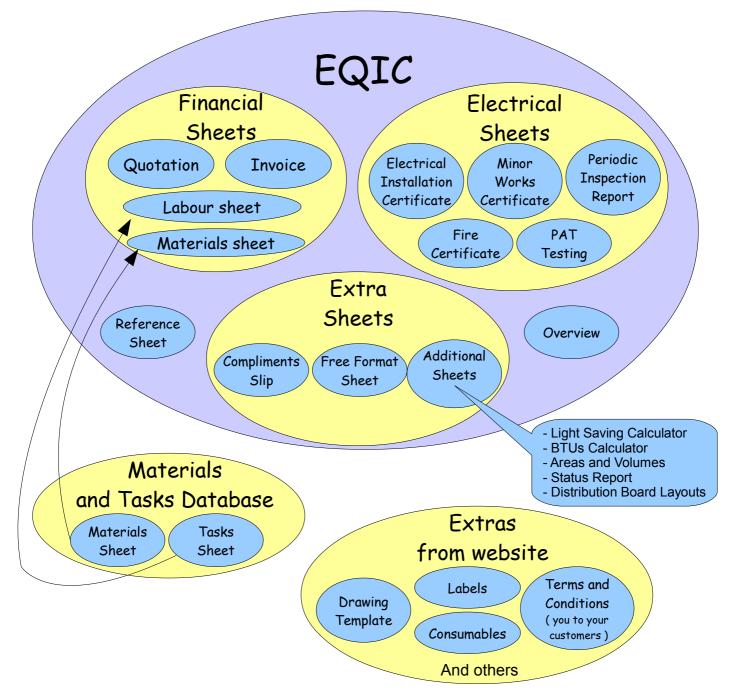
"If you have been trawling the internet looking for flexibility and ease of use then look no further"

Just take a look inside ...

AllertonEPS-Software.co.uk 184 Mather Avenue Allerton Liverpool L18 7HD

Landline – 0151 729 0095 Mobile – 07944 296136

1 – Organagram



KEY FOR THIS GUIDE



A circle with a solid blue background is the text associated with a pointer on the picture above it.

Whereas a blue circle with a white background is text associated with the picture but does not have a pointer.

Screen Casts and the latest version of this guide are to be found at :www.allerton.uwclub.net/EPS/EQIC_Instructions

Lets start with an overview of what the software delivers ...

1 – What the software delivers :-

Allerton- E 729 0095 07944 296136	Plumbing Services	Quotation 20080999
Contact : GregMcCormack@A 184 Mather Avenue, Allerton, L Customer		26th September 2008
Mrs Mary Poppins		Contact Details
349 Turriff Road	29 Sparrow Road	Tel : 123 4567 Jay's ₀₇₉₄₄ 296136 Mobile :
L14 2EJ	L15 2EJ	Email : Email
Description of Work	Bathroom refit	

Thank you for inviting Allerton-EPS.co.uk to quote for the work that you are considering.

Please find below our Quotation, we hope that this meets with your approval.

Feel free to contact us for any clarifications or slight changes in the scope of the job.

Item	Description ↓ -Multiple Options	Source / Price Check	Qty / Count		Unit Price		Price
5	Materials :-						
1	Consumer Board with twin RCDs		1	£	101.10	£	101.10
2	Plywood 18mm for Shower Base, Shower Tray, Chocks of wood to create the shower plinth, 3off Waste Elbow(s) - 40mm, Thin Bendy Plywood to go around base of tray		5	~		~	
3	14 mtrs of 10mm2 Shower cable, 2off Trunking 25mm x 16mm, 50 Amp Pull switch, surface mounted backplate for shower, Isolation valve 15mm (screwdrviver)		5			£	327.40
4	4 Boxs of Plain White Wall Tiles, 11Kg Bag of Tile Grout, 1 Tub of Tile Adhesive		3				
5	2 Mtrs of Chrome piping - 15mm, 15mm Elbow, 15mm Tees, 2 mtrs of 15mm PEX Flexible Pipe, 3 mtrs of Pipe Lagging, Shower Waste Trap - 40mm		6				
6	Man With A Van = Brodas Rubbish Removals, 148 Upper Parliament Street, Tel 708 5739		1	£	40.00		
7	Consumables :-	examples	1	£	20.00	£	20.00
/	Labour :-		1	L	20.00	L	20.00
8	Running the cable, Wiring Up the Pull Switch and Shower, Cabling up shown including isolator opposite door, trunking in the bedroom and hallway	er :	3			£	330.00
9	Tapping into rising main and plumbing in shower, Mounting the shower and water integrity	testing for	2				
	Electrical Certification :-						
10	Electrical Inspection and Testing & Issuing of Certificate / Report		1	£	30.00	£	30.00
11	Notification to Building Control as per Part P of the Building Regulations - Domestic Installer Scheme		1	£	8.50	£	8.50
	Total					£	817.00

By placing an order for work, you agree to our Terms and Conditions. General Terms and Conditions are available on our website, or can be requested from us at the time of ordering the work.



Please visit us at http://www.Allerton-EPS.co.uk 184 Mather Avenue, Liverpool L18 7HD Contact :- GregMcCormack@Allerton-EPS.co.uk Tel : 0151 729 0095 Mobile : 07944 296136

1 – What the software delivers :-

Allerton-E	lectrical .CO	Quotation
729 0095 07944 296136	Plumbing .uk	20080999
Contact : GregMcCormack@A		26th September 2008
184 Mather Avenue, Allerton, L Customer	Works Address	20th Ocptember 2000
Mrs Mary Poppins		Contact Details
349 Turriff Road	29 Sparrow Road	Tel : 123 4567 Jay's 07944 296136 Mobile :
L14 2EJ	L15 2EJ	nail : Email
Description of Work	Bathroom refit	
Thank you for inviting Allerton-EPS.	Headers can be changed	as well

Please find below our Quotation, we hope that this meets with your approval. Feel free to contact us for any clarifications or slight changes in the scope of the job.

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7 Optional Group 9 Optional price not included	
7 Optional Group 9 Optional price not included	
La/ our :- in final price	0.00
8 Running the cable, Wiring Letter Build and B	0.00
9 Tapping into rising main and of Groups can have hidden elements	
Elements that are included in the price but not seen by your customer. Things like 'Setting Up time'.	
Electrical Certification :- by your edistorner. Things into octaining op time :	
10 Electrical Inspection and Testing & Issuing of Certificate / Report 1 £ 30.00 £	0.00
11 Notification to Building Constitution VAT Registered ? 1 £ 8.50 £	8.50
if your business is VAT registered	
Total	

By placing an order for work, you agree to our Terms and Conditions. General Terms and Conditions are available on our website, or can be requested from us at the time of ordering the work.



Please visit us at http://www.Allerton-EPS.co.uk 184 Mather Avenue, Liverpool L18 7HD Contact :- GregMcCormack@Allerton-EPS.co.uk Tel : 0151 729 0095 Mobile : 07944 296136

You can even have pictures with coloured borders ...

Allerton 729 0095 07944 29613	Plumbing .uk	Quotation 20090702
Contact : GregMcCormac 184 Mather Avenue, Allerto Customer Mr Alan Thompson		10th July 2009 Contact Details
14Road Allerton Liverpool	14 Road Allerton Liverpool	Tel : 0151 3593 Mobile : Mobile
L18	L18	Email: ag.thompson@net.com

Thank you for inviting Allerton-EPS.co.uk to quote for the work that you are considering.

Please find below our Quotation, we hope that this meets with your approval.

Feel free to contact us for any clarifications or slight changes in the scope of the job.

Please note that there are options that are not included the final price

tem	Description	Link if app)	Qty / Count	Unit Price	Price
1	Materials :-			045.00	£15.3
1	Floodlight		1	£15.30	±15.3
2	Floodlight LED 80W without PIR, Exterior PIR (Passive Infra Red), 8 mtrs of 2 Way Lighting Cable		3	£78.80	
3	Floodlight LED equivalent to 60W with PIR LED PIR Flood Fitting, Ideal Replacement, or 150-300W Halogen Fitting, Energy Saver Only 3 Watt Power Consumption, 2400 Lumens Output, 45 LED,s Super Bright, Aluminium Di-Cast Body, Runs Cool IP54		1	£35.40	
4	Rectangular Bulkhead light ht	tp://www	1		
5	3 mtrs of 2 Way Lighting Cable, 4 mtrs of Round Cable Flex for Lighting, 13 Amp Plug, Metal Gland Box, Exterior PIR (Passive Infra Red)		5		£53.6
6	13 Amp Plug, Twin Light with PIR (Price estimated), 4 mtrs of Round Cable Flex for Lighting		3	£32.00	
	Consumables :-				
7	Examples :- htt	tp://www.	1	£5.00	£5.0
	Labour :-				
8	Fitting of standard 500W PIR unit		1		£30.
9	Fitting of LED (equivalent to 80W) Floodlight with a separate PIR		1	£40.00	
10	Fitting of LED (equivalent to 60W) Floodlight with integral PIR		1	£30.00	
11	For the Garage : Rectangular Bulhead light with separate PIR		1		£30.
12	For the Garage : All in one jobbie (with Twin Lamps and incorporating PIR)		1	£25.00	
	Electrical Certification :-	0			
13	Electrical Inspection and Testing & Issuing of Certificate / Report		0	£30.00	£
14	Notification to Building Control as per Part P of the Building Regulations - Domestic Installer Scheme		0	£12.50	£
	Total			Ţ	£133.9







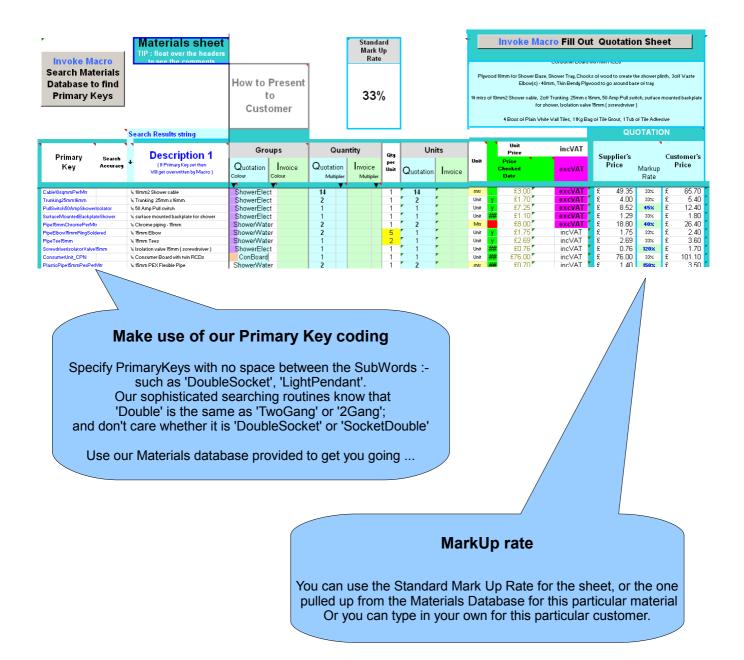
1 – Behind the scenes Labour Analysis Sheet

Allerton- 729 0095 07944 296130 Contact : GregMcCormack 184 Mather Avenue, Allerto	Plumbir 6 Servi @Allerton-EP	ces S.co.uk		our Analys 20080906	is	Label everything board in the sam the consumer b there are some	e location, ens oard, Push al	suring good a I the wires thr	ccess to ough th	o the rear of e holes, If
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L						Tiling and Groutir (used from t	he old installa	tion), Siliconi	e scree ng and	n and doors Sealing
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					_	sho	wer and testin	g for water in	tegrity	
							26th Septe	ember 2008		
						Р	redicted / (Quotation		
	Choose Print	ting Mode for this pa	00							
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Quotation	Both	Invoice		Done	,	് Quotation	Rate	33.75		
a					0%		Engineer1		£	-
Task0302 - New Electric Shower					0% 0%	ShowerElec	Engineer1		£	-
Running the cable					0%	ShowerElec		4	£	80.00
Wiring Up the Pull Switch and Show	wer				0%	ShowerElec		2	£	40.00
Tapping into rising main and plumb	oing in shower				0%	ShowerWate	Engineer1	2	£	40.00
Mounting the shower and testing fo					0%	ShowerWate			£	150.00
Cabling up shower : including isola	tor opposite do	or, trunking in the bed	room and hallw	vay	0%	ShowerElec		1	£	20.00
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Make use of the Task database

Use the existing Tasks in our database (as supplied) or make up your own tasks and store them in the Task database, then call them up to populate the Labour Analysis Sheet and the Materials Sheet

1 – Behind the scenes Materials Sheet



1 – What the software delivers :-Electrical Certificates

					if	his certificate is not va the serial number has een defaced or altered	DCP4/	20081002
		is an important and valua Id be retained for future re	eference	DOMESTIC ELI Issued in accordance with B enrolled with NICEIC, Warw	ritish Standard 7671 - Rec	uirements for Electrical Ins	stallationsby a Domestic	
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indicated by my / ou and care when carr	ur signature adjacent), particular rying out the design, construction	rs of which are described above, havi n, inspecting and testing, hereby CER	ing excerised reasonable RTIFY that the said work	certificate. For the D		ION and the INSPECTION	AND TESTING of the	installation.
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RTICULARS	OF THE DOMESTIC	INSTALLER		NEXT INSPE			rms of years, months or	r weeks, as appropriate
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NIC E	nrolment No 1	Postcode	L18 7HD				attached schedule	
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	ertificate should be accompanied he model Electrical Installation C				Please see the	e 'Notes for Recipients	5'	Page 1 of 4
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Type 'T' for ✔, 'C' for , 'L' for LIM , 'N' for n/a _Note the Font change and the Colour change_

Any combination of Colour of the form, whether it is an Electrical Certificate OR an Domestic Electrical Certificate can be accommodated.

1 – What the software delivers :-Electrical Certificates

CIRCUIT DETAILS Circuit Designation (For Distribution Circuits, insert 'D') (For Distribution Circuits, insert 'D')														OTIO	er é	been defac			LATI		DTIC	
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5 A3 Alarm , Doorbell 2 1.5	1 0.4 BS EN 60898	8 B	6	6		7.67																
6 A4 Downstairs Lights 1.5	1 0.4 BS EN 6089	8 B	6	6		7.67																
7 B4 Upstairs Lights 1.5	1 0.4 BS EN 6089	8 B	6	6		7.67					LIM	LIM	2.12	2.17								
8 B3 Immersion Heater 1 2.5	.5 0.4 BS EN 6089	8 B	20	6		2.30					>199	>199	>199	>199								
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This form is based on the model shown in Appendix 6 of BS7671 (as amended) - As laid out by the Electrical	afety Council (Jan 2008)																					
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Green forms are for Non-Registered Electrical Contractors AND yet this software can issue a 'Green' Domestic Electrical Certificate OR

(as below) a Domestic Installer can issue an Electrical Certificate.

You can move the appropriate logo into the top left hand corner

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1 – What the software delivers :-Electrical Certificates

Can be easily modified for more complicated three-phase installations – such as this church $\dots \,$ (wired using the old colours)

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This form hasn't been filled in completely ...

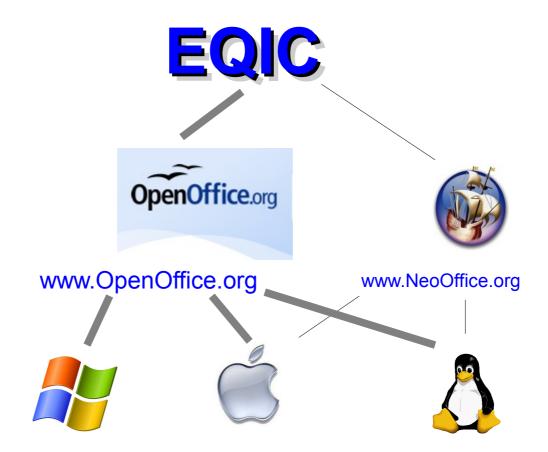
Software Platform

The EQIC Software sits on the OpenOffice.org platform; freely available from www.OpenOffice.org

This makes the software very easy to operate and modify. Using a spreadsheet package means that you don't have such a steep learning curve for the software as all the basics are already there and we can make use of all the functionality of the package. For example if you would like to change the look and perhaps the wording that appears on one of the sheets particularly the Quotation or the Invoice, then with a little bit of familiarity with a spreadsheet program; you will have no difficulty in making changes.

It allows you to create your own logo and use that on your Quotation or Invoice – or just use the standard text to get you started.

OpenOffice is available as an Office environment sitting on Windows, Mac and Linus platforms and thus this software can sit on all these platforms ...



Thus the EQIC Software is compliant with Windows7 and the latest MacOS.

Both **OpenOffice** and **NeoOffice** are freely available to download from the link above – our software sits on Calc which is the spreadsheet application, but also contained in the suite is the Draw, Writer (and others) - this software also has an accompanying technical drawing which uses Draw as it's editor.

NeoOffice is a spin off from Open Office and thus always lags behind the capabilities of Open Office – over time the reasons for Neo Office have diminished as Open Office addresses the issues that gave a reason for Neo Office's creation. And now our recommendation is to use Open Office for all platforms.

Software Platform (contd)

Calc has many other advantages over Microsoft's Excel :-

• Because it is **free** it means that all users can be using the most up-to-date version of the software – and that means that we only have to provide one version of the software to run on the latest version of Calc, we can notify when a later version of Open Office is released..

• The PDF generator allows you to select only part of the sheet to be converted to PDF format.

• The macros aren't tied to the sheets in the same way as Excel – so when you export a sheet – to give a customer a mini spreadsheet of the 'Light Saving Calculator' (for example) you can easily copy the sheet to a new spreadsheet. (Not only are the macros not copied but the way our software operates we have made sure that you don't end up with links back to the original spreadsheet.). Also you can have multiple Minor Works Sheets (or other sheets) all within the same spreadsheet (which would be very difficult to accomplish in Excel).

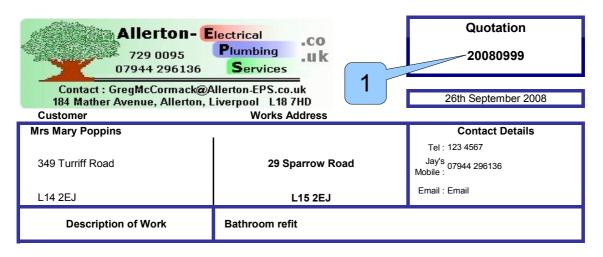
• Open Office's Calc file is a lot smaller than the equivalent Excel file, and there isn't a limit on the number of conditional formats which hampered the software when on Excel.

• Calc is a more flexible, integrated platform than Excel and doesn't exhibit the restrictions that Microsoft impose on it's Excel. The platform is structurally much newer than Excel and it shows – it's implementation is fresher and consequently better in all sorts of subtle ways.

• It has an inbuilt spell checker which highlights bad spellings to you as you type.

For users on a platform any spreadsheets from which you are trying to extract information when a macro is operating need to be opened manually. The main occasion when this needs to be remembered is for the SearchDatabase Macro – the MandT - MaterialsAndTasks database needs to be opened up within Calc at the same time as the Template / Customer file – otherwise the SearchDatabase macro will fail. Within the Mac environment the macro(s) cannot open up the MaterialsAndTasks database but can access it once it is already open. This is a slight inconvenience for Mac users which is just a case of remembering to manually open up the MaterialsAndTasks database before invoking the macros that access the MandT database.

The Quotation Sheet



Thank you for inviting Allerton-EPS.co.uk to quote for the work that you are considering.

Please find below our Quotation, we hope that this meets with your approval.

Feel free to contact us for any clarifications or slight changes in the scope of the job.

Item	Description	ource / Price Check	Qty / Count	Unit Price	Price
5	Materials :-				
1	Consumer Board with twin RCDs		1	£ 101.10	£ 101.10
2	Plywood 18mm for Shower Base, Shower Tray, Chocks of wood to create the shower plinth, 3off Waste Elbow(s) - 40mm, Thin Bendy Plywood to go around base of tray		5		
3	14 mtrs of 10mm2 Shower cable, 2off Trunking 25mm x 16mm, 50 Amp Pull switch, surface mounted backplate for shower, Isolation valve 15mm (screwdrviver)		5		£ 327.40
4	4 Boxs of Plain White Wall Tiles, 11Kg Bag of Tile Grout, 1 Tub of Tile Adhesive		2		
5	2 Mtrs of Chrome piping - 15mm, 15mm Elbow, 15mm Tees, 2 mtrs of 15mm PEX Flexible Pipe, 3 mtrs of Pipe Lagging, Shower Waste Trap - 40mm				
6	Man With A Van = Brodas Rubbish Removals, 148 Upper Parliament Street, Tel 708 5739		1	£ 40.00	
		-			
7	Consumables :-	_	3 🗆	£ 20.00	£ 20.00
	Labour :-			£ 20.00	£ 20.00
8	Running the cable, Wiring Up the Pull Switch and Shower, Cabling up shower : including isolator opposite door, trunking in the bedroom and hallway		3		£ 330.00
9	Tapping into rising main and plumbing in shower, Mounting the shower and test water integrity	ting for	2		
	Electrical Certification :-				
10	Electrical Inspection and Testing & Issuing of Certificate / Report		1	£ 30.00	£ 30.00
11	Notification to Building Control as per Part P of the Building Regulations - Domestic Installer Scheme		1	£ 8.50	£ 8.50
	Total				£ 817.00

4

By placing an order for work, you agree to our Terms and Conditions. General Terms and Conditions are available on our website, or can be requested from us at the time of ordering the work.



Please visit us at http://www.Allerton-EPS.co.uk 184 Mather Avenue, Liverpool L18 7HD Contact :- GregMcCormack@Allerton-EPS.co.uk Tel : 0151 729 0095 Mobile : 07944 296136

The Quotation Sheet

Numbers refer to the previous slide

20091199 – This is job number – unique within your filing system. Year Month JobNumber within the month – This is flexible and could extend to three characters if you wish – in which case you should call the first job 001 (This format is ISO 8601 compliant)

The number is extracted from the first section of the filename (the numbers or characters before the first '_' (underline) character)

Our preferred way to sort out the numbering is from the Windows Explorer – COPY and PASTE and then change the name of the file to the appropriate information – providing you use an '_' underscore to separate the numbers from the text – the unique number will be used within your spreadsheet.

Providing the number is unique within your filing system – then it complies with BS7671 – for the Electrical Certification.

If you prefer you can always download certificate numbers from the NICEIC - www.niceicdirect.com

(we retain the Rev Number at the end of the filename - but that isn't necessary for you)

A Supergroup of materials has been specified, and so the customer is presented with the total cost of the groups but is denied the breakdown of the cost of the individual groups.

2

- 3 One of the groups has been specified with a first character of the group name being a lowercase character, such as 'man_with_van' and is thus an optional group and is not included in the final sum. This allows multiple optional extras to be included on the quotation sheet.
- As part of your tailoring your template to your needs your terms and conditions (if you have them available online) can be linked to from here.
 - As part of your tailoring your template to your needs an extra logo in this position is quite acceptable.
- 6 This is the end of the 'Getting Started' section. The remaining sections go into more detail – but if you haven't tried the software up to this point – now would be a very good time to try ...

2 - Getting Started

As a customer you will receive either a CD or an email containing the Template file. This is the core file that you will need but you will also need another few files which you download from either the website link that you will receive OR on the CD – although the most bang up-to-date version will be those via the web link.

Don't worry if you lose the weblink – the Overview Page of the Template file contains the link.

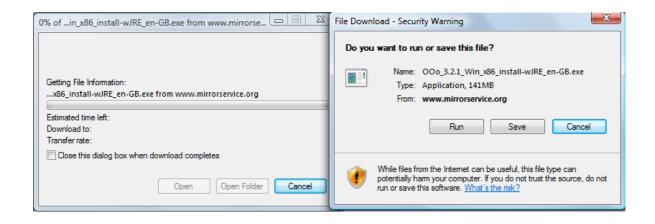
The first thing that you ought do – is to download Open Office – from www.openoffice.org - This is frequently being up-dated and it is always a good idea to visit this site and download the latest version.



As with any software being installed it is a good idea to download it onto a freshly powered up machine – without too many unnecessary windows having been opened.

As you can see from below Rev 3.2.1 was 141MB – so depending on your machine and your download rate this could take 10minutes, and then once it is downloaded it will take a while while it configures itself on your machine. So be patient.

Perhaps you can continue to read this guide while it downloads.



Getting Started - Pg2

Once it is downloaded and installed the only thing to do to tailor the software is to specify that the macro Security should be set to Normal rather than High. Setting the Macro security to Normal will mean that the software will treat all macros on your machine as vetted and thus suitable for running by Open Office. We recommend that you use a good firewall and virus software and scan your machine regularly for viruses. Our software will be seen as being clean and thus you can have the added confidence of your virus software considering that this software is genuine.



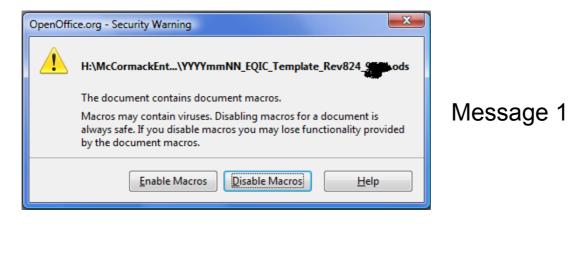
Macro Security		x
Security Level	Trusted Sources	
		e locations are allowed to run. All other macros, not, are disabled.
H <u>ig</u> h. ⊚ Only sign are disabl		sted sources are allowed to run. Unsigned macros
Medium. Confirma	tion required befor	e executing macros from untrusted sources.
All macro		vithout confirmation. Use this setting only if you are at will be opened are safe.
		OK Cancel <u>H</u> elp <u>R</u> eset

When Open Office starts up – by default it sets the ENTER key to move down to the next cell on the spreadsheet – this automatic moving of the focus to another cell was to be disabled – as shown below ...

 OpenOffice.org User Data General Memory View Print Paths Colors Fonts 	Metrics Updating Measurement unit Centimeter Iab stops 1.25cm Image: Construction of the stops Image: Centimeter of the stops Image: Construction of the stops Image: Centimeter of the stops Image: Construction of the stops Image: Centimeter of the stops Image: Construction of the stops Image: Centimeter of the stops Image: Construction of the stops Image: Centimeter of the stops Image: Construction of the stops Image: Centimeter of the stops Image: Construction of the stops Image: Centimeter of the stops Image: Construction of the stops Image: Centimeter of the stops Image: Construction of the stops Image: Centimeter of the stops Image: Construction of the stops Image: Centimeter of the stops Image: Construction of the stops Image: Centimeter of the stops Image: Construction of the stops Image: Centimeter of the stops Image: Construction of the stops Image: Centimeter of the stops Image: Construction of the stops Image: Centimeter of the stops Image: Construction of the stops Image: Centimeter of the stops Image: Construction of the stops Image: Centimeter of the stops <t< th=""></t<>
Security Appearance Accessibility Java Online Update Improvement Program Load/Save Language Settings OpenOffice.org Calc General View Calculate Sort Lists Changes Grid	Input settings Press Enter to move selection Press Enter to switch to edit mode Expand formatting Expand references when new columns/rows are inserted Highlight selection in column/row headers Use printer metrics for text formatting Show overwrite warning when pasting data
Print ⊕ OpenOffice.org Base	OK Cancel <u>H</u> elp <u>B</u> ack

Getting Started - Pg4

Then when you open the spreadsheet – you should get the following messages ... If you don't then the macros won't work ... and you will lose most of the sophistication of the spreadsheet.



This message advises that the Overview sheet's listeners have started. If when the spreadsheet was last saved you were looking at another sheet – then the message would advise you about the other sheet's listeners – For Example 'All Quotation Listeners started'.

1	soffice	
	'ThisWorkbook' Listener Running	Message

Without these messages the software's macros won't operate – and the software will have very limited functionality ...

3

If you are still having difficulties with getting the macros to start then please have a look at Section 12 of this manual.

A Typical Directory

Before you start opening and tailoring your template – we recommend that you create a directory for your customer files – we use CustomerYYYY and then put the following files into your directory :-

- Template file
- MaterialsAndTasksDatabase file (available from the website link)
- Drawing Template file (for Electrical Schematics)

😋 🔍 🛛 🚺 🕨 Computer	▶ Local D	Disk (H:) → AllertonEPS → Customers2011		✓ 4y Search		<u>×</u> ا _
File Edit View Tools mywebsearch ↓ ↓ Organize ↓ ↓ Views ↓			🕽 Smiley Central 🛛 💻	Screensavers 🔻 🕨 Cursor Mania	🎝 MyFunCards	•
Folders	~	Name	Date modified	Туре	Size	Tags
Customers2009		MaterialsAndTasksDatabase.ods	09/08/2010 17:32	OpenDocument Spreadsheet	217 KB	
Lustomers2010		TYYYYmmNN_DrawingTemplate_Rev305.odg	22/07/2010 16:47	OpenDocument Drawing	62 KB	
Customers2011		WYYYmmNN_EQIC_Template_Rev823d27.ods	25/07/2010 22:56	OpenDocument Spreadsheet	996 KB	
CustomersExtras	-					

FREEBIE

If you want to download the mini spreadsheet - click

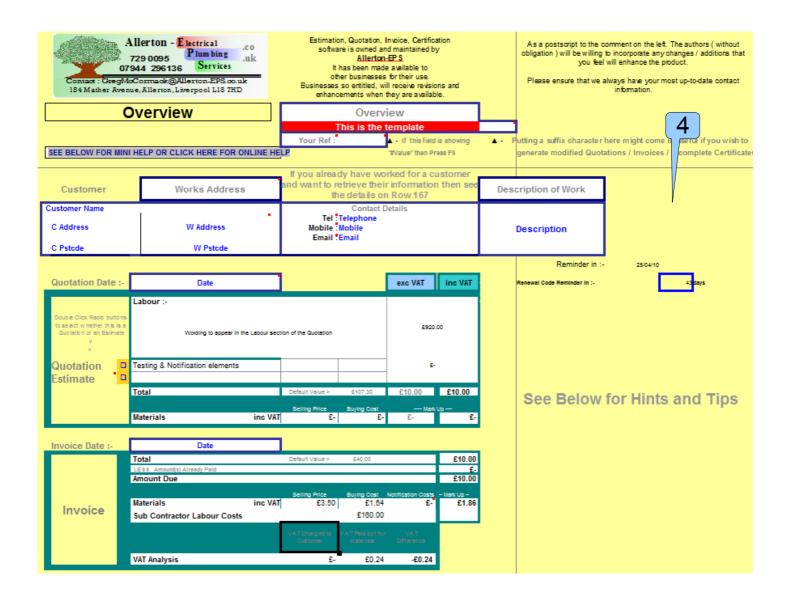
http://www.allerton.uwclub.net/EPS/EQIC_Instructions

and choose the 20091106_LightSavingCalc.ods

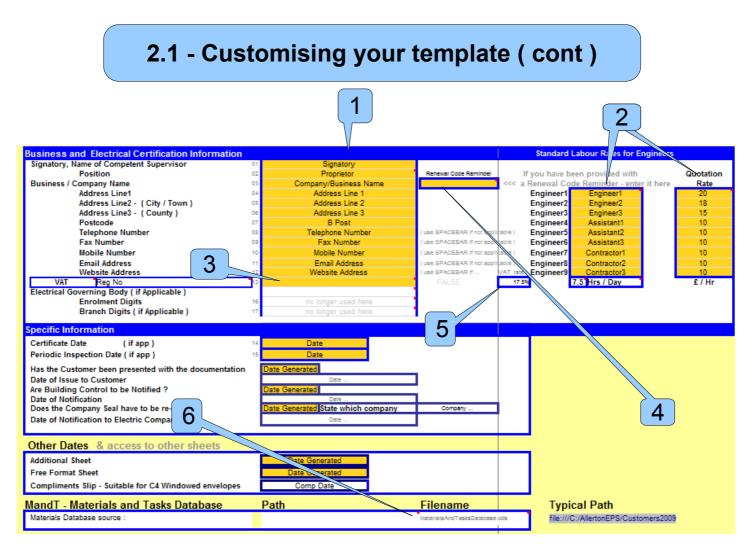
We encourage you to download this spreadsheet and have a look how we have included the daylight saving calculation for the year and the flexibility of setting the lights to stay on longer over the weekend nights. This is a taster - we are giving away for free – you can download this file without purchasing the software, the complexity of this little taster will convince you that we take our commitment to you very seriously.

2.1 - Customising your template

Open the Template file and start customising it to suit your needs - Below is the introduction to the Overiew sheet as well as introducing the customisable items - There is a further list of customisable items in Section 13 of this guide.



Continued on the next page



12

Fill In your business information

including your Engineers and rates at which they work.

If you are VAT registered then put in your VAT Registration number in here.
 You will need to set the VAT registered status in the
 MandT - MaterialsAndTask database as well - see later in this guide.

4

3

Renewal code reminder - use it as a memory aid – once this date expires updates and the support from AllertonEPS will no longer be available (unless you have paid a small amount at the end of each anniversary of the purchase of the software).



You must type in the new VAT_Rate here if it were to change. (The only other location is in MaterialsAndTasksDatabase.Materials.T3)

6

Type in the path to the MandT -MaterialsAndTasks Database (if you are just starting out – we recommended that you download the template and the MaterialsAndTasks database to the same directory, so you can just leave this as is)

2.1 - Customising your template



Create your logo and place it here. It must be of a similar shape and size to our logo (as seen at the top of the Overview Page). If you want to: you can place the logo on the pages that the customer will see directly which is more accurate than using this macro. The sheets that the customer will see are the :-

- Quotation sheet,
- Invoice sheet,
- FreeFormat sheet,
- CompSlip sheet.
- The logo can also be used on the Drawing Template file.

The Electrical Sheets need to have the logos suitable for your business placed in the correct places – and if you have the space then you can put your business logo in suitable places on the electrical sheets. You will also need to manually enter your Registration numbers on all the relevant sheets (if you are a Registered Electrician)

Don't worry about logos when you are trying out this software for the first time. It is mentioned here only because it is part of tailoring your template to your own needs.

2.1 - Customising your template



You're done : **Save the template** as your own customised template.

There are one or two other customisations that you might want to consider. On the Quotation and the Invoice sheets : -The link to the 'Consumables' points to AllertonEPS's website.* The link to the 'Terms and Conditions' points to AllertonEPS's website* There is a section at the back of this User Guide which clarifies customisation of the template.

(* - because we don't have any where else to point the link to. When you purchase the software you are provided with the templates for these two aspects – should you need any further help – See the FAQ section of this guide.)

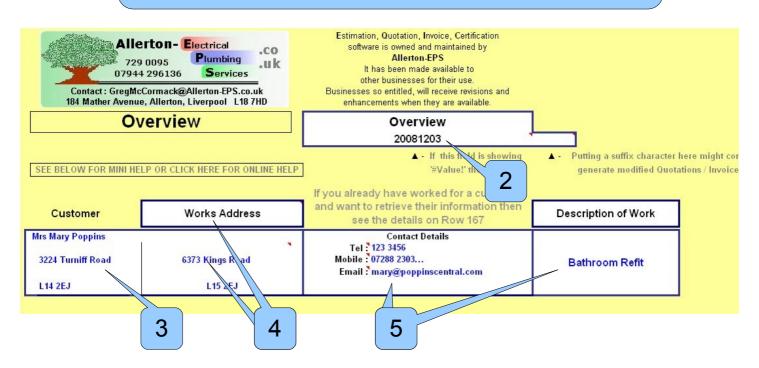
(Please notify us of any others that we might have missed)

You're then ready to create your first customer file, and if you do it the same way as we – then you would end up with a directory similar to the one below.

We suggest that from the Windows Explorer you COPY the template file (CTRL-C) and then PASTE (CTRL-V) and then you can rename the file before double clicking on it to open it and tailor it to your customer ...

Name	Date modified	Туре	^
a20091101_SpringwoodHouse_Camera_Rev820f81.ods	06/11/2009 20:29	OpenDocument Spreadsheet	
🔁 20091101inv.pdf	06/11/2009 20:22	Adobe Acrobat Document	
a 20091102_EricGoodwin_PipeLeak_Rev820f85.ods	06/11/2009 16:34	OpenDocument Spreadsheet	
🔁 20091102inv.pdf	06/11/2009 16:22	Adobe Acrobat Document	
a 20091103_HawthorneGardens_Rev820f86.ods	09/11/2009 00:50	OpenDocument Spreadsheet	
20091104_Mauree 2007 Managements Rev820f86.ods	06/11/2009 20:36	OpenDocument Spreadsheet	
20091105_DaleyToiletLeak_Rev820f86.ods	07/11/2009 19:02	OpenDocument Spreadsheet	
🔁 20091105inv.pdf	07/11/2009 18:35	Adobe Acrobat Document	
🗃 20091106_2LivingstoneDriveOutsideLights_Rev820f97b	13/11/2009 10:59	OpenDocument Spreadsheet	
acoustic content and the content of	13/11/2009 10:27	OpenDocument Spreadsheet	
🔁 20091106_LightSavingCalc.pdf	13/11/2009 10:28	Adobe Acrobat Document	
🗃 MaterialsAndTasksDatabase.ods	06/11/2009 17:23	OpenDocument Spreadsheet	
YYYYmmNN_DovedaleBaptist_Wiring.odg	17/05/2009 22:56	OpenDocument Drawing	
YYYYmmNN_DrawingTemplate_Rev302.odg	23/05/2009 20:48	OpenDocument Drawing	

2.2 – Typing in your first customer information



- From Windows Explorer. Copy and Paste the Template File, creating a copy. Rename it to be relevant to the specific customer. For example : 20110902_JonesKitchenRing.ods (Second job in September)
- 2 Open it in Calc, and notice that the number section of the filename has become the reference for the document and is the reference for the electrical certificates. (which complies with BS7671 because it is unique to your business)
 - 3 Type in the Customer's name, their address and postcode.
- 4 Then type in the Work's address. If the Work's address is the same as the Customer's address then you can make use of one of the many little macros that exist to make life a bit easier Use the top right hand corner pull down of the title to select to copy the contents. (Floating over the title will reveal a comment which will help you).
- 5 Then complete that section, with the customer's contact information and finally the description of work. (The titles of the contact information can be changed and so you can introduce Fax numbers or being a little more adventurous specify 'Adam M :' for Adam's Mobile number which can be typed in next to it.)
- 6 A sophisticated aspect of this software is that the information is transferred to other sheets by a macro. You will notice a slight delay each time you are entering information because the macro is being invoked to transfer the information. This is done to allow you to type the information into any sheet and the information then gets broadcast to the other sheets. This allows you great flexibility but without the macro would introduce circular references. It means also that you can type the information into any sheet and all the other sheets are updated with the new information.

2.2 – If you are typing in information from an established customer

Your Logo has been broadcast to the other sheets Your Logo Links & Hyperlinks	< Del Thi	se Select ete this logo and replace with your logo ensuri is is achieved by changing it's NAME from som 'NAME' is to be found under 'Insert,Name,Defi
to your own website (or just use AllertonEPS's) General Website reference Consumables (on Quotation and Invoice sheets) Other Paths	http://allerton.uwclub.net/EPS/index.http://allerton.uwclub.net/EPS/Consu Path	
Retrieve Customer information from another spreadsheet		20080906_MrsRodgersShower_Rev809g.

If you already have customer information available because you have already worked for a particular customer then you can save time by typing the name of the spreadsheet into this section of the Overview sheet.

The Path again is optional because the chances are high that the file from which you want to extract the information is a customer file stored in the same directory as the one in which the current file resides.

The macro is triggered when you move away from the cell from which you have typed in the information. The macro will prompt you whether it can overwrite a particular aspect of the customer's details if it finds that information is already stored on your spreadsheet.

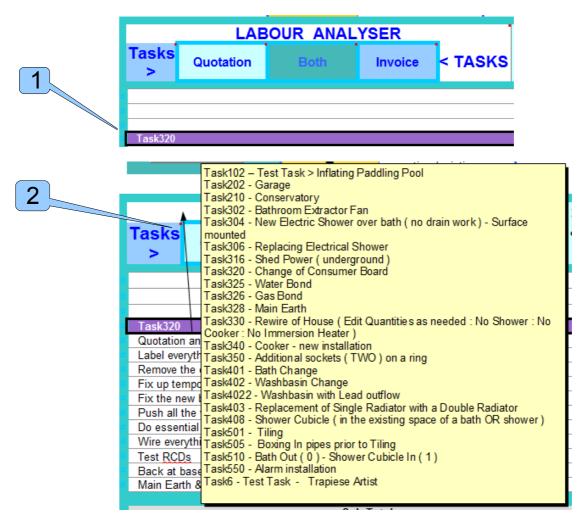
[This macro used to be available in the Excel version of EQIC – but hasn't yet been translated to Open Office. Although we are looking into alternative ways of storing customer information – in the form of a database – which might negate the use of this macro.]

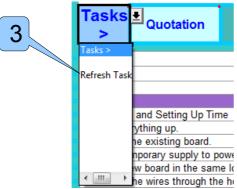
2

1

In the next section we are going to have an initial look at the **Labour Analysis** sheet.

2.3 – The Labour Analysis sheet





1

To best explain things, we recommend that you call up a Task from the **MandT** - MaterialsAndTasks database. This is a single database with two sheets – a Materials sheet and a Tasks sheet.

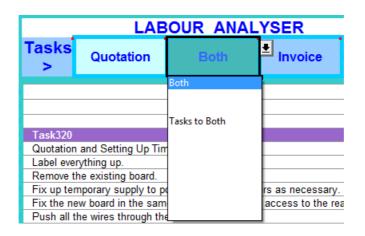
If you don't know the number of the task – then just float over the Task header (2) and the 'current' task list will show up for you.

2.3 – The Labour Analysis sheet

Just type in the Task's Header – such as 'Task550'; when the macro executes it completes the rest of the line of the header 'Task550 – Alarm installation' this has the added benefit that when you ask the Task macro to execute for a second time the tasks with completed headers are ignored.

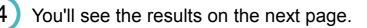
So if you want to pull the information from the task database for a second time for a particular task then you must restore the task header to it is shorter version (you might have to delete duplicate rows of entries on the Labour and Material sheets)

3 If you want to 'Refresh the Task List' then select the Pull Down from the same cell – and the macro will open the MandT database and go the Tasks sheet and find all the task headers and populate the comment of this cell – if you do this for your template file then you will have all your Tasks headers available without having to refresh the list every time you wish to discover a task's number.

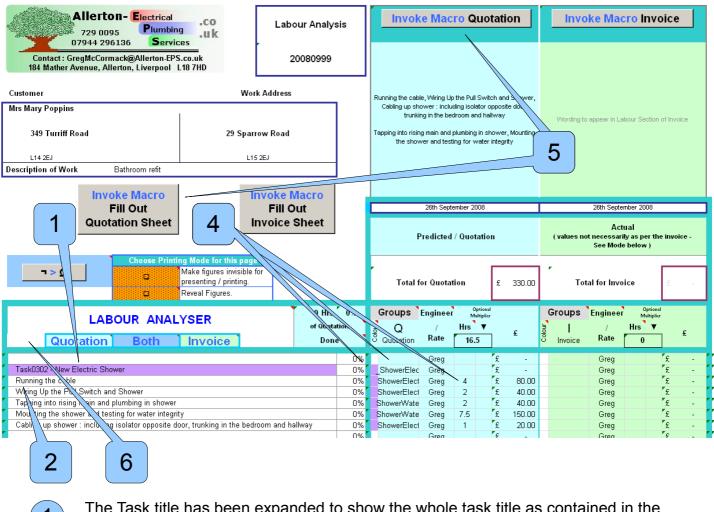


Decide whether you want to populate this spreadsheet with

Task information to the Quotation, Invoice or Both. Don't worry at this stage which to choose. It depends on how you want to show your Invoice information. We prefer the wording 'As per Quotation' – in which case we just want to populate the Quotation with the task information. Just use the pull down menu of the Quotation wording. (Hovering over the cell with your mouse will reveal a comment which will help you – just like context sensitive help).



2.3 – The Labour Analysis sheet



The Task title has been expanded to show the whole task title as contained in the MandT - MaterialsAndTask database.

The Labour aspects of the Task have been put in the rows following the title

On the Materials sheet, the Materials for the Task have been put in. (You'll see that later $\ensuremath{\mathsf{later}}$)

The Colour, Group and Hours have been typed in.

3

4

5

6

Before you click on the macro button – go and have a look at what is currently being shown on the Quotation.

Then come back here and click on the macro button. (There are two sets of buttons – both do the same thing) Then go back and have a look at the results (The materials section will look a bit sparse – we need to do a bit more work on the materials sheet first)

New to the software is the introduction of the Task list in the comment associated with the cell indicated. The cell has a Pull Down option so that you can refresh the Task list whenever you want need to do so. Just another example of the software being made as simple to operate as possible.

2.4 – Groups and Groupings

Ľ			GROUPINGS for Presentation to Customer
	Total for	Qu	There are Three group types :-
H	Groups	End	Eg. Description
Ľ.	O	Eng	1 'Socket' or 'A' a standard group name.
Colour	≺ Quotation	F	2 'bath' if you want to make a group optional meaning that it is not included in the financial aspect of the Quotation \ Invoice.
		Eng	Start the group name with a lowercase character.
		Eng Eng	3a '_Socket' you might want to not reveal an element of a group to the customer - in which case precede it with an '_' underscore.
	ShowerElect ShowerElect ShowerElect	Eng Eng Eng Eng	3b '_bath' you might want to not reveal an element of an optional group to the customer - in which case precede it with an '_' underscore and leave the first character in lowercase.
	ShowerWater ShowerWater ShowerElect	Eng Eng Eng Eng	 Groups (max of 20) are shown to the customer alphabetically. If the first FIVE characters of the Group are the same as another Group's first five characters, then the values of the groups are merged
		Eng Eng Eng	 The colour assigned to the first element of a group is shown as the colour of the whole group on the Quotation / Invoice. If the text contains the word - 'Note' - such as 'Bath_Note' then this can be used to identify 'Notes' to the customer.
			 If the text contains the word – 'Hdr' – as in 'Bath_Hdr' then the description is treated like a Header on the Quotation sheet. In the current version of OpenOffice 3.2 – it is difficult to create a group called 'Bath' and another called 'bath' – because the first entry is assumed to be the format that the text automatically adjust to. There are a number of solutions, including adding a space to the end of the Group Name, or just choosing a different group name (they needn't be the same name)

Groups are one of the main sophistications of this software. They apply exactly the same to the Labour details as they do to the Materials.

The details are listed below but you can always hover over the Group header and look at the comment when working just with the spreadsheet.

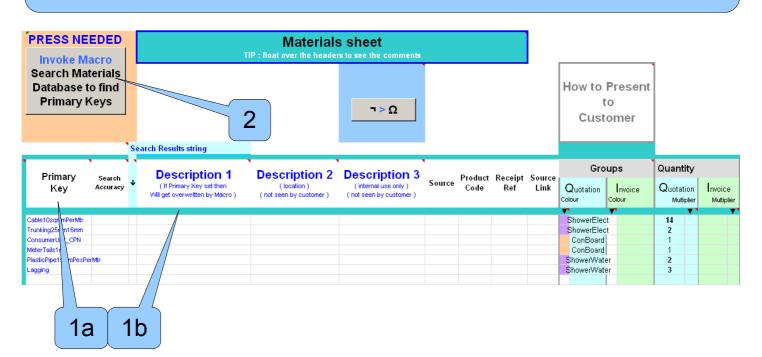
The title for example (the first entry) has a similar name to the rest of the group but is preceded by the '_' underscore character, and because of that the wording 'Task title' does not appear on the Quotation, but is included in the financial aspect of the group.

There isn't an example of it above – but it is best to mention it here. If the group name starts with a lowercase letter (such as 'bath') - the group is an optional group and is not financially included in the final sum.

You can combine the two – so that an entry with a group name of '_bath' is financially a member of an optional group but the text does not appear on the destination sheet (either the Quotation or the Invoice. Examples later ...)

If you look above you'll notice **Showe**rElect and **Showe**rWater, because the first five letters are the same they form a **Supergroup**, resulting in the financial values of the separate groups being combined on the destination sheet. In this way the customer sees them as separate aspects of the job but is not provided with the financial breakdown of each part of the job.

2.5 – Material Sheet



The Materials Sheet is where the materials for the project are identified.

Continuing the example of populating details from Task302.

Task 302 – like most tasks contains labour elements and material elements. The Labour elements as you have already seen have been put into the Labour sheet when you invoked the macro. Whilst you did that the Material Sheet was also populated with the materials that would be needed for the job.

1a 1b

2

1

All the materials in this example were specified as Primary Keys. But they could equally have included a material such as an "off-cut of plywood" that is difficult to price – and this can included as a Description with an associated price.

The advantage of specifying the materials as Primary Keys is that the detail of the price and a full description are extracted from the Materials database when you click the macro.

Click on the macro button and see the fields being populated.

2.5 – Material Sheet – after Materials Macro has been pressed



(1)

The 'Search Database' macro button has just been pressed and information from the Materials Database has now been placed in the following locations :-

Description fields	(1,2&3)
Source	(your source for the material item)
Product Code	
Receipt Reference	
Unit	(Kgs , Pack , Tonnes)
Price	(your purchase price)
VAT	(whether the price is including VAT or not) *
Quantity per Unit	(normally 1)
Date the price was	last checked
Mark Up Rate	

If you specify the material without using the Primary Key then all this information cannot be extracted from the Materials database and has to be typed in manually.

So for example a shower trap was added to the material's list (after Task302 was expanded) and it was added as a Primary Key (more on the structure of Primary Keys later on) and it was then searched for using the 'Search Database' macro. It isn't necessary to put the colour in the group, because the colour of the group on the destination sheet is that of the first element of the group. (NOTE : Even if that element is hidden)

* The VAT Column is to show whether your purchase price has VAT included or not, it does not reflect the VAT status of your business.

3 – Groups in Detail

	LABOUR ANALYSER Quotation Both Invoice		Hrs _{Quotat} Done	· ·	Colour	Groups Q Quotation	Engineer / Rate	^{Optio} Multip Hrs ▼ 19.5		£
#				0%			James		£	-
#	Task0302 - New Electric Shower	\frown		0%		_ShowerElect	James		£	-
#	Running the cable	้า		070	_	ShowerElect	James	4	£	80.00
#	Wiring Up the Pull Switch and Shower	2		0%		_ShowerElect	Anthony	2	£	30.00
#	Tapping into rising main and plumbing in shower			0%		ShowerWater	James	2	£	40.00
#	Mounting the shower and testing for water integrity			0%		ShowerWater	James	7.5	£	150.00
#	Cabling up shower : including isolator opposite door, trunking in the bedroom a			0%		ShowerElect	James	1	£	20.00
#	Cabling up shower : including isolator opposite door, trunking in the			0%		ShowerElect	Anthony	3	£	45.00
#	Shower Tiling			0%		showerTiler	Anthony	8		120.00
#	Shower Tiling			0%		showerTiler	John	8	£	-
#				0%			James		£	-
	As on Quotation		5			3				

Sheet

	Labour :-			
2	Running the cable, Cabling up shower : including isolator opposite door, trunking in the bedroom and hallway	2		£ 365.00
4	Tapping into rising main and plumbing in shower, Mounting the shower and testing for water integrity	2		z 303.00
3	Shower Tiling	1	£ 120.00	

We have used the groups on this Labour sheet as an example – but these notes apply equally to the groups on the Material sheet. The group names have no significance between the Labour and Material sheets – although it is sensible to have similar (if not the same) names for the groups on both sheets.

These tasks have been collected together under one group which has been called 'ShowerElect'. This means that the tasks will all be collated together with a comma separating the individual tasks within the group when presented on the Quotation sheet [Invoice Sheet if you had happened to enter information in the columns associated with the Invoice]. The name of the group is arbitrary and is not shown to the customer, though to be included in the final price it must start with a capital letter. The group name doesn't have to marry up with the materials associated with doing the work nor with a group name for the Invoice, but you might find it helpful if they do.



4

The engineer 'John' has **not** been specified as an engineer in a section of this spreadsheet further down and thus his name appears in **red** because the rate at which he works has not been defined (you must specify his name and his rate in the Engineering Analysis section - which is to be found at the bottom of the current sheet.) - This is pretty important because the Quotation sheet currently shows £120 for the whole of the tiling job and thus is inaccurate unless this rate is specified.

This is 'Electric Shower' installation has been modified to show you various effects. The third task of the group has a preceding '_' underscore and is therefore not to be displayed to the customer - although as you can see is still included in the financial aspect of the group.

There are two people doing the 'Shower Tiling' but the customer doesn't want to see multiples of the same text, so if the text is the same as the preceding line – it is not included in the wording on the destination sheet (either the Quotation or Invoice – depending on which one you are working)



If you want to show a group to the customer but don't want it included in the final price presented to the customer - ie. an alternative approach to something - then specify it with a leading lowercase letter. This is termed an optional group.

The groups are presented to the customer alphabetically no matter in which order they are typed into the Labour sheet (or the Materials Sheet).

LABOUR ANALYSER	rs 0% lotation	u	Groups Q	Engineer /	М	Optional ultiplier	
Quotation Both Invoice D	one	Colour	Quotation	Rate	23.	5	£
#	0%			James			£ -
# Task0302 - New Electric Shower	0%		_ShowerElect	James			£ -
# Running the cable	0%		ShowerElect	James	4		£ 80.00
# Wiring Up the Pull Switch and Shower	0%		_ShowerElect	Anthony	2	3	£ 90.00
# Tapping into rising main and plumbing in shower	0%		ShowerWater	James	2	/	£ 40.00
# Mounting the shower and testing for water integrity	0%		ShowerWater	James	7.5/		£ 150.00
# Cabling up shower : including isolator opposite door, trunking in the bedroom and hallway	0%		ShowerElect	James	1/		£ 20.00
# Cabling up shower : including isolator opposite door, trunking in the bedroom and hallway	0%		ShowerElect	Anthony	В		£ 45.00
# Shower Tiling	0%		showerTiler	Anthony	8		£ 120.00
# Shower Tiling	0%		showerTiler	James	8		£ 160.00
As on Quotation sheet							_
2 Running the cable, Cabling up shower : including isolator opposite door, t bedroom and hallway	runking in	he	2		£	2	35.00
3 Shower Tiling	1		2 £	280.00			
4 Tapping into rising main and plumbing in shower, Mounting the shower and water integrity	nd te		2		£	1	90.00

Above you can see that the first element of the group has been assigned the colour purple - this is useful when you want to associate the Labour group with a Material group. You will also find it useful when you want to better identify optional groups. The colour seen on the Destination sheet is taken from the **first** element of the group and thus it isn't necessary to fill out all the boxes with the colour (but it helps visually on the Labour Analysis sheet).

The third task has a value in the Optional multiplier column. This is useful when you are assigning an hourly rate to a task and then counting the number of repeats of this particular task. A good example would be the case when there are a number of sockets that are to be installed and you can say that the task takes 2 hours to complete and there are three sockets to be installed. The Optional multiplier column is normally left untouched and remains at unity.

There are two group names that have significance...

2

3

If the first four letters of the group are **Free** as in **Free**Issue or just **Free** (or free – with a leading lowercase letter) - then the item is listed in the description but the software accepts that there is not a price associated with this item

If '**Note**' or '**note**' appears in the group name then it is considered a note and again no financial value is expected to be associated with this item. (More details on the next page) ...

Free is a special word for the Materials SheetwhilstNote is a special word for the Labour Analysis Sheet

The 'Note' can appear in any portion of the group name - for example - 'ShowerNote'

(The Material sheet group name :- 'Free' has not been fully implemented).

3 – Group Headers

ltem		Link Qty	Unit	Price
		fapp) Count	Price	
5				
	Materials :-			
	Distribution Board 2a			
1	Metal CPN 6 way Consumer Board, 3off RCD 30mA 80 Amp, CPN Breaker, CPN Breaker, 6 mtrs of 10mm2 Shower cable	5	£-	£148.60
	Earthing Equipment			£67.90
2	3off Earthing Terminal, 2off Earth strap	2		£67.90
	Items purchased through eBay			
3	5 x C50 20A Crabtree Breakers from eBay	1	£20.20	£20.20
4	CRABTREE C50 TRIPLE POLE MCB 15A	1	£14.98	£14.98
5	C50 breakers in ex-board condition set of 6. 2 x 5A, 1 x 10A, 2 x 20A, 1 x 30A	1	£14.49	£14.49
	Office Ring			
6	3off Socket Switched 2 Gang – Double Pole, 2off Double Surface mounted box, Metal Double Back Box, 15 mtrs of Power Cable	4		£24.60

Groups							
Quotation Colour Colour							
	Ebay Hdr Ebay 1 Ebay 2 Ebay 3 Earthing Hdr						
	Earthing Earthing _Earthing						
	O_Lights_Hdr O_Lights O_Lights O_Lights O_Lights O_Lights O_Lights O_Lights						
	O_Lights O_Lights DB2_Hdr						
	DB2 DB2 DB2 DB2 DB2 DB2						

If the text '**Hdr**' is included in the Group name then a Header is created for the group on the Destination sheet – be that the Quotation or Invoice Sheet.

The graphic on the left shows the Group names that clumped the groups together.

(The font colour automatically changes to white when the software considers that the colour of the background that you have chosen to highlight a particular group is too dark for black to be the best font colour – as seen in the second header – 'Earthing Equipment'.)

(Note also that the order of the groups is alphabetical rather than the order in which you have typed the groups, if you want to move a group then put an Z at the beginning of the group to move it to the bottom of the list OR A to move it to the beginning.)

Earthing Equipment					Earthing Hdr
Earthing Terminal	4 way	Toolstation	62785		Earthing
Earth strap		MersElec			Earthing
Equipotential Bonding (10sqmm) £ / mtr	over the counter for Gas / Wa	Smithdown	Electrics		_Earthing

The header is also identified on the Materials sheet.

3 - Groups (Don't pay too much attention until you experience this yourself)

#	Re Hanging the door is not something the	hat we would want to undertake		0%	XHangNot	e James		£	-
#	Nor would we want to paint the garden g	nome		0%	XHangNot	e James		£	-
		As on Quotation sheet							
	5 Re Hanging the door is want to paint the garder	not something that we would want to gnome	o undertake, Nor wou	uld we	2		£		

'Note' within Labour Analysis Group

If the group name contains the word '**Note**' then this group will presented as a Note on the Quotation / Invoice sheet, without any financial value being attributed to the group. This is most applicable to groups in the Labour section. If you want the Note to immediately follow a group called 'Loft' (for example) then you could call the note group 'LoftNote'. If you just had called the second group 'Note' then you might have named a group 'Motor' which because it lies alphabetically between the two groups would have appeared before the note and thus the note would appear visually to be attached to the 'Motor' group. [Please see the next bullet point about supergroups which has a bearing on the two group names 'Loft' and 'LoftNote']

Supergoup code has already been demonstrated in the 'Getting Started' section of this guide. But to recap :- If the first three letters of a group match up with the first three letters of the previous group, then the financial aspects of the groups are merged and a Supergroup is created.

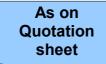
Note that Supergroup coding is case-sensitive and the groups 'Shower_elect' & 'shower_tiling' wouldn't be combined into the same supergroup as the second group is an optional group.

	_igthing in th		0%	Loft	James	4	£	80.00
#_L	_oft Hatch ei	nlarging is not part of this quotation	0%	LoftNoteQuote	James		£	-
		As on Quotation sheet						
	2	Ligthing in the loft		1		£	80.00	`
	3	Loft Hatch enlarging is not part of this quotation		1		2	30.00	,

[Just for clarification :- this supergroup coding would mean that groups 'Loft' and 'LoftNote' in the previous bullet point **would be** included in the same supergroup and thus the value associated with 'LoftNote' is not of significance.]

3 – Groups (Don't pay too much attention until you experience this yourself)

#	Tapping into rising main and plumbing in shower	0%	ShowerWater	James	2		£	40.00
#	Mounting the shower and testing for water integrity	0%	ShowerWater	James	7.5		£	150.00
#	Task0302 - New Electric Shower	0%	_ShowerElect	James			£	-
#	Running the cable	0%	ShowerElect	James	4		£	80.00
#	Wiring Up the Pull Switch and Shower	0%	_ShowerElect	Anthony	2	3	£	90.00
#	Shower Tiling	0%	showerXTiler	Anthony	8			120.00
#	Shower Tiling	0%	showerXTiler	James	8			160.00
#	Tapping into rising main and plumbing in shower	0%	ShowerWater	James	2		£	40.00
#	Mounting the shower and testing for water integrity	0%	ShowerWater	James	7.5		£	150.00
#	Cabling up shower : including isolator opposite door, trunking in the bedroom and hallway	0%	ShowerElect	James	1		£	20.00
#	Cabling up shower : including isolator opposite door, trunking in the bedroom and hallway	0%	ShowerElect	Anthony	3		£	45.00
#	Re Hanging the door is not something that we would want to undertake	0%	XHangNote	James			£	-
#	Nor would we want to paint the garden gnome	0%	XHangNote	James			£	-



	Labour :-					
2	Running the cable, Cabling up shower : including isolator opposite door, trunking in the bedroom and hallway	2				
3	Tapping into rising main and plumbing in shower, Mounting the shower and testing for water integrity, Tapping into rising main and plumbing in shower, Mounting the shower and testing for water integrity	4			£	615.00
4	Shower Tiling	1	£	280.00		
5	Re Hanging the door is not something that we would want to undertake, Nor would we want to paint the garden gnome	2			£	-

Technical Detail - (don't read this until you need to)

The sorting of the groups is AlphaNumeric , but is not case sensitive – this is to allow you to put lowercase group names with their associated main group. But there is a drawback :- the SuperGroup code does not operate. It is much easier to understand by example :-

If the following group names are used in the following order :-

ShowerWater ShowerElect showerTiler XHangNote

then they get put in the following order :-

ShowerElect showerTiler ShowerWater XHangNote

This means that because the optional group 'showerTiler' comes between the 'ShowerElect' and the 'ShowerWater' group then the SuperGroup code that would normally combine the two groups (Elect and Water) does not operate.

The way around this problem would be to call the optional group 'shower**X**Tiler' to make sure it doesn't get put between the 'Shower**E**lect' and the 'Shower**W**ater' groups, then the optional group is put into the correct position on the Quotation, and consequently the Supergroup code can operate..

(Otherwise every optional group would be at the end of the list without any facility to re-arrange them - which is probably not what you would want)

Don't worry about this ... It becomes obvious when you want to put comments in the correct places and then you could just work it out yourself using trial and error.

4 – Colours and Nomenclature



Information to be typed in

Information not applicable OR obtained elsewhere in the spreadsheet - frequently on the Overview Sheet. You can break the link - but we suggest that you find the original location and enter information into there.



Normally 'Warnings' of unusual occurrences (close to being errors). There are other indications of unusual occurrences such as Bolding and other highlighting just to bring something to your attention. (These are not specified in this table - but should be obvious when you are using the software)



Errors or Very Unusual Situations. (If you don't want to print the sheets out with these colours then you can always change the 'Conditional Formatting' yourself - see below for more details).

Used on occasions when there is a need to press a macro button

Price Checking

On the Materials Sheet and in the MandT - MaterialsAndTasks Database there are fields associated with the quality of the price that is shown. A RED background indicates that the price of a commodity has not been checked. You can continue on regardless - and no further warnings of the lack of price verification will be issued.

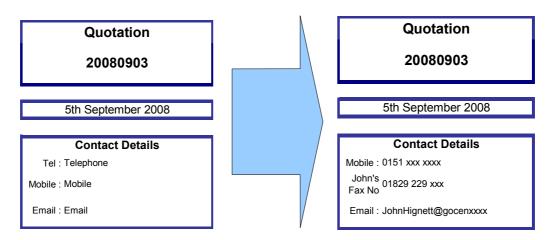


Price Checking has been performed on this commodity and the information in the box - such as 'April2012' shows when the price was last checked. It is advisable to get all the materials Price Checked before commencing with a Quotation or an Invoice.

Nomenclature



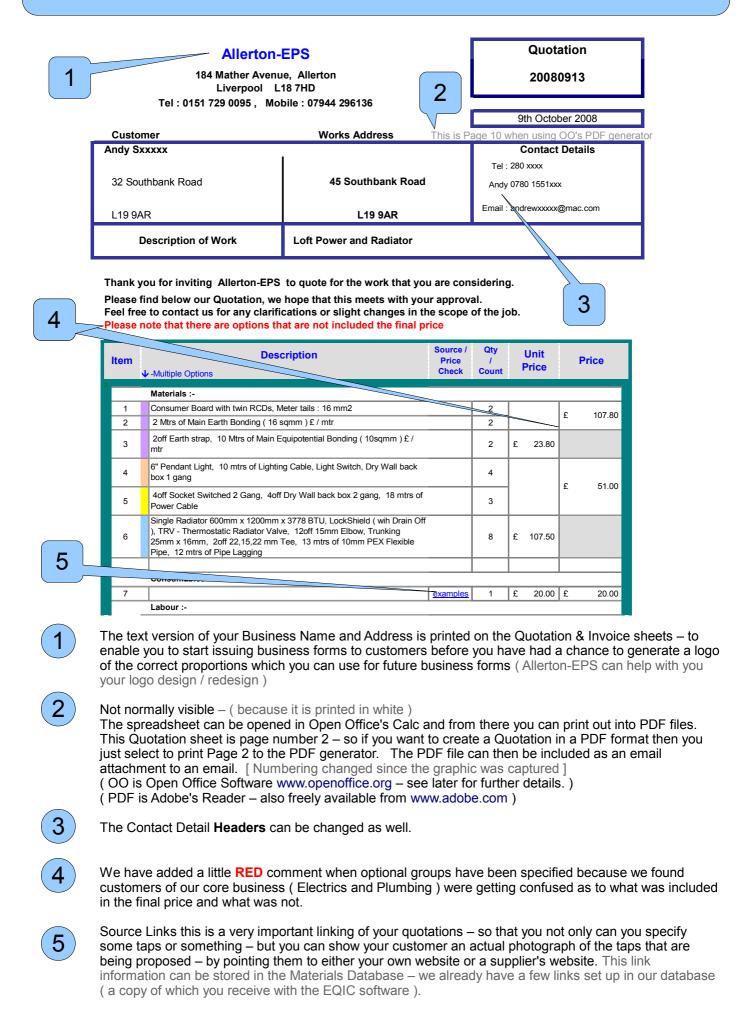
Floating over a little red dot in the corner of a cell will produce a comment that is very pertinent to the location in which it is positioned. [Don't worry about the 'Macro' at this stage it is described later]



Information can be typed into any field, for example there are six separate fields for the **Contact Details** – and any information can be typed in, this is then replicated to the other sheets.

People familiar with spreadsheet applications will not expect this versatility within a spreadsheet – a macro is operating tying fields together across various sheets. This will restrict you adding rows or columns before these fields – if you have a specific need to do that then contact us and we will probably change the software to accommodate your needs.

5 – Quotation | Invoice Sheet(s) in Detail



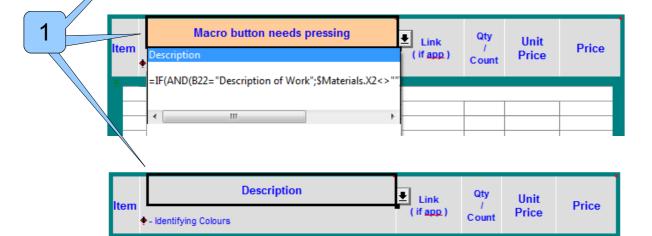
Suppressing Warning Message

Mrs Goodchild Annes Road St Michaels Aigburth	St <u>Annes</u> Road St Michaels <u>Aigburth</u>	Contact Details Tel : 0151 Anno 1999 Mobile : Mobile Email : Email
L17 6BN	L17 6BN	
Description of Work	Doorbell and RCD	

2

Thank you for inviting Allerton-EPS.co.uk to quote for the work that you are considering. Please find below our Quotation, we hope that this meets with your approval. Feel free to contact us for any clarifications or slight changes in the scope of the job.

	Macro button needs pressing	Ł Link	Qty	Unit	Price
netz		(if <u>app</u>)	Count	Price	Price



1

2

Normally when the SearchMaterialsDatabase macro is needing to be pressed the software alerts you when you are looking at the Quotation or Invoice sheets by the Salmon pink message. The software is alerting you to the need to sort out the problem on the Materials sheet (or Labour Sheet).

However this can occur whilst working on the Invoice sheet – and the Quotation sheet can show the problem (that is in fact only relating to the Invoice sheet)

The solution is to suppress the warning message on the Quotation page : This is done by using the Pull down selection for the 'Description' – this prevents the warning message appearing : The text changes as per the final graphic of the three above.

A similar locking occurs for the 'Price'

If you use the Pull down to make this text into Capitals 'PRICE' – then it locks the Quotation. It only locks the Quotation as far as the macros are concerned – stopping them automatically updating the Quotation

– This is useful when the Quotation has been accepted by the customer and you don't want to accidentally press the wrong button when you are working on the generation of the Invoice. The Text changes to capitals 'PRICE' – just to remind you that the <u>Quotation's macros</u> are locked.

5 – VAT Registered businesses & PrePaid Amounts

Item	Description	Source / Price Check	Qty / Count	Unit Price		Price
5	Materials :-					
1	15 mtrs of Lighting Cable, 2off Light ; gang, 2off Single Surface mounted bo mtrs of 2 Way Lighting Cable, ChocBox junction box				£	
2	5off Double Surface mounted box, 5off Socket Switched 2 Gang, 18 mtrs of Power Cable		3			
3	Contactum RCD - B6303/2, Split Load for Contactum Consumer Board		2		£	
4	20ff Mains / Battery Smoke Alarm 240v with 9v Backup		2	£ 16.45	£	32.90
5	Consumables :-		4	£ 20.00	£	
5	Labour :-	xamples	1	£ 20.00	Ł	20.00
6	Labour costs as per the Quotation		1		£	293.00
					~	200.00
	Electrical Certification :-					
7	Electrical Inspection and Testing & Issuing of Certificate / Report		1	£ 30.00	£	30.00
8	Notification to Building Control as per Part P of the Building Regulations - Domestic Installer Scheme		0	£ 8.50	£	-
	Total				£	456.50
	LESS Amount Already Paid - 22nd November				£	30.00
	LESS Amount Already Paid - 23rd November				£	40.00
	Amount Due				£	386.50

ltem	Description	ource / Price Check	Qty / Count	Unit Price		Price
5	Materials :-					
1	15 mtrs of Lighting Cable, 2off Light Swi gang, 2off Single Surface mounted box, mtrs of 2 Way Lighting Cable, ChocBox junction box		7		£	68.90
2	5off Double Surface mounted box, 5off Socket Switched 2 Gang, 18 mtrs of Power Cable		3			
3	Contactum RCD - B6303/2, Split Load for Contactum Consumer Board		2		£	-
4	2off Mains / Battery Smoke Alarm 240v with 9v Backup		2	£ 14.00	£	28.00
	Consumables :-					
5		amples	1	£ 20.00	£	20.00
	Labour :-					
6	Labour costs as per the Quotation		1		£	293.00
	Electrical Certification :-					
7	Electrical Inspection and Testing & Issuing of Certificate / Report		1	£ 30.00	£	30.00
8	Notification to Building Control as per Part P of the Building Regulations - Domestic Installer Scheme		0	£ 8.50	£	-
	Sub Total				£	439.90
	VAT Reg No. 123 123 12				£	76.98
	Total				£	516.88
	LESS Amount Already Paid - 22nd November				£	30.00 -
	LESS Amount Already Paid - 23rd November				£	40.00
	Amount Due				£	446.88

3

The first graphic is produced when the business / company is not VAT registered and

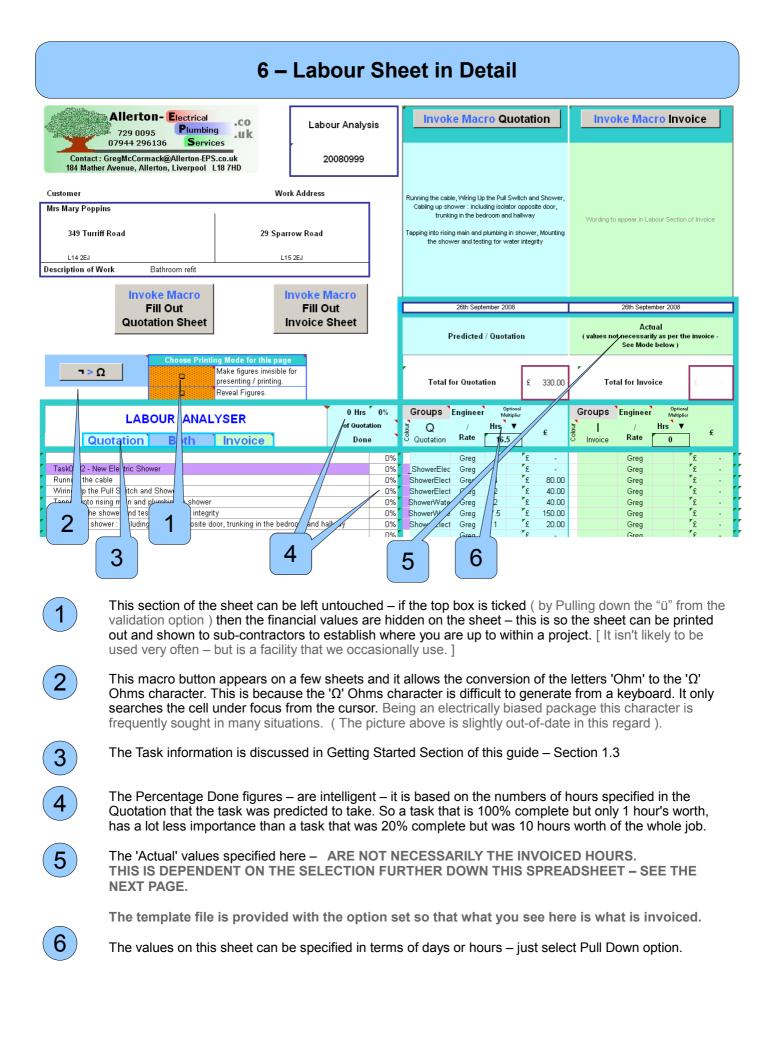
the **second** is produced when the business / company **is** VAT registered [Notice that the Material costs vary but not the Labour and other elements]

1

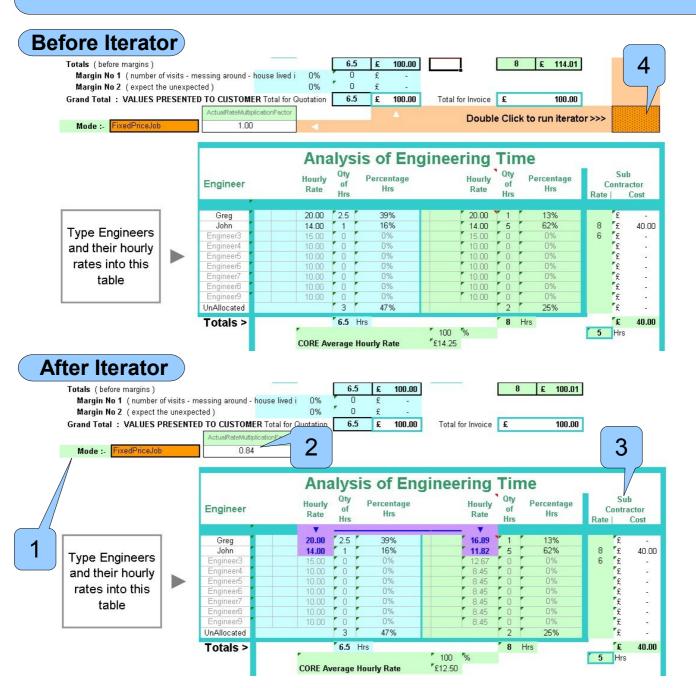
2

3

You can also see the Amounts already paid (and the dates of those payments) can be included in the $\ensuremath{\mathsf{Invoice}}$



6.2 – Analysis of Engineering Time



At the bottom of the Labour Analysis sheet is the 'Analysis of the Engineering Time' this compares the hours and price for the Quotation with the reality of the Invoice. The tweaking of the actual rates is only applicable to the situation where the job has to be completed within a fixed price. The Mode is selected on a Pull Down List where it says 'Mode' 1. When the option to present the customer with the actual costs is selected no tweaking of rates occurs.

The two pictures are a 'before' and 'after' the invocation of the macro. The macro is started from the pull down selection under the mode.

In second picture, the salmon pink background has been removed and the Engineering Rates have been tweaked for the Invoice. The £ 114 from the Invoice has now been dropped to £100 to match up with the Quotation. The 'tweaking' is an iterative process adjusting the value in the 'ActualRateMultiplicationFactor' box **2** so that the Invoice matches the Quotation. In this example 8 hours were spent doing the job rather than the projected 6.5 hours specified in the Quotation. This means the engineers didn't actually earn their expected £20 and £14/Hour respectively, but rather the multiplication factor of 0.84 was applied to the values and the corrected values were actually £16.89 and £11.82 respectively. Because the rate values differ from the Quotation to the Invoice they are shown on a purple background.

As described above - The method of invoking the macro has changed slightly since this first picture. And thus this orange box is not the way to invoke to the macro

4

3

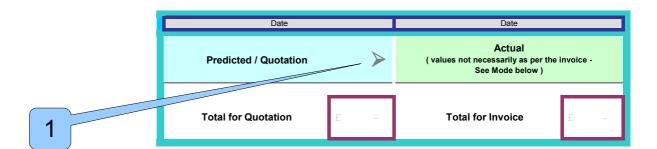
The columns on the right show what the subcontractors were actually paid, for example John was actually paid £8/hour for the 5 hours he worked, which is £40 and this is deducted from the Main Engineering Rate further down the spreadsheet. (not shown). The spreadsheet calculates the Main Engineering Rate, by subtracting the £40 from the Invoiced value and then dividing the remainder by the number of hours that were not attributable to the subcontractors. So this truer rate (should) improve the actual rate at which the Main Engineer has operated.

All these figures that are generated are there to assist in the generation of future quotations and act as a sophisticated post job analysis of the distribution of labour and the resulting contribution that sub contractors make to the profit margins of the business.

Greg	0.75		£	15.00
Greg	0.25		£	5.00
Greg	0.5	10	£	100.00
Greg	1		£	20.00
30	1		£	30.00
James	0.25		£	-

This mini graphic above shows :-

- These are Decimal units (if they are hours as above) then 0.25hr = 15minutes
- You can type in multipliers if you wish (for repeated tasks) (as shown '10' for the third row)
 You can type in an actual rate (£30 / Hr as above) but if you do that the 'Engineering Analysis' as per the previous slide cannot operate.
- You must type in names of Engineers that appear in the 'Engineering Analysis' section otherwise the software won't know at what rate 'James' is to be charged out and his name is highlighted in red.



1

If you were to Select three ' $\emptyset \emptyset \emptyset$ ' from the Pull Down validation options - then the Labour and Materials contents of the Quotation are transferred over to the Invoice.

(The macro will **not** overwrite information that is already specified in the Invoice sections – so it is best done earlier in the process – if you want to specifically have the wording for the labour section to say 'As per the Quotation' then delete the contents of the Labour sheet that has just been populated by this macro. [This might seem a bit of a hack handed way of doing this – but doing it this way will populate the material elements of the Invoice and then you can just revert back to the 'As Per Quotation' for the Labour elements with an easy selection and deletion.]

(This arrow affects the contents of the Materials sheet as well – but there isn't an equivalent arrow on the Materials sheet - you would have to come over to the Labour Sheet to invoke this macro)

6 – Labour Sheet in Detail

	0%		Greg		£	-		Greg		£	-
Tap into the central heating pipes.	0%	radiator	Greg	2	2			Greg		£	-
Fit lagging where necessary	0%	/radiator	Greg	3	1			Greg		£	-
Commission the radiator	0%	/ radiator	Greg	4	E			Greg		£	-
	0%	1	Greg		£	20		Greg		£	2
Sub Total	//	/		14.6	5 £	293.00			14.65	£	293.00
Variations to be included on the Invoice (after Quotation)											
								Greg		″£	-
								Greg		£	-
Radiator							 Radiator 	Greg	9	£	180.00
Extra Socket work and Extra Switch for lighting work							ExtraElec	Greg	0.75	£	15.00
Mounting of Smoke Alarms	-]						ExtraElec	Greg	0.75	£	15.00
· · · · · · · · · · · · · · · · · · ·	U%							Greg		£	-
Sub Total of Additional Work									10.5	£	210.00
Totals (before margins) Margin No 1 (number of visits - messing around - house lived in - furniture and carpets Margin No 2 (expect the unexpected) Grand Total : VALUES PRESENTED TO CUSTOM 2)	Total for C	- 0% 0% Quotation	14.6 0 0 14.6	£	293.00 - - 293.00	Total fo	or Invoice	25.15 £	£	503.00 503.00
When the Quotation was generated the radia with a lowercase first letter of the group name chose to have the radiator installed and thus generated the group was moved into the Varia	e ' <mark>r</mark> adia it becar	tor'). T me part	he cu of the	stom e job.	ier a So	ccepte when	ed the qu the Invoi	uotatio ce wa	on and as	ł	

It doesn't make much sense to have optional items in the Invoice section but the software is able to do it – should the unusual need arise.

The Margins 1 and 2 can be added to the Quotation for such things as :-

- A house full of furniture, number of extra visits anticipated.

In truth though the author no longer uses these margins and thus their influence on other factors and the Engineering Analysis has yet to be established.

Pred	icted / Q	uotatio	n	A	(va		necessar	tual ily as per le below)		roice -										-		
r Total fe	or Quota	ion	£	293.00				ton need Ir elemei		563.00	ſ	Ľ	.abour			values	ple Tin must b onto m	e manu	ally			
Groups	Engineei	Op Mul	otional Itiplier		Gro	ups E	Enginee	Opti Multi	ional plier			A	nalysis			copied	onto m	ani tabi	-)	Text Change	в	
Jon Q	/	Hrs	•	£	Colour_	1	/	Hrs	▼	£		1	Hours		Start	Lu	nch	End	Decima	Quotation Inv	oice	
O Quotation	Rate	14.6	5		ວ Inv	voice	Rate	17.65		~			3	x	Time	Start	Finish	Time	Hours	4	1	
	Greg		£	-			Greg		"£	-									0.00	0	• 0	^ 0
	Greg		£	-			Greg		£	-					08:00	12:00	13:00	17:00	8.00		0	0
ElectSocket ElectSocket	Greg	2	£	40.00	Elect	tSocket	Greg	- 3	£	60.00	-		. 1	1.					0.00	Moui 1 Mo	ui 1	3
3	GIRA	0.15	*	3.00			Greg				4	$\overline{)}$					5	<u>}</u>				

3 To the rig

5

2

To the right of the Labour Analysis sheet are extra columns.

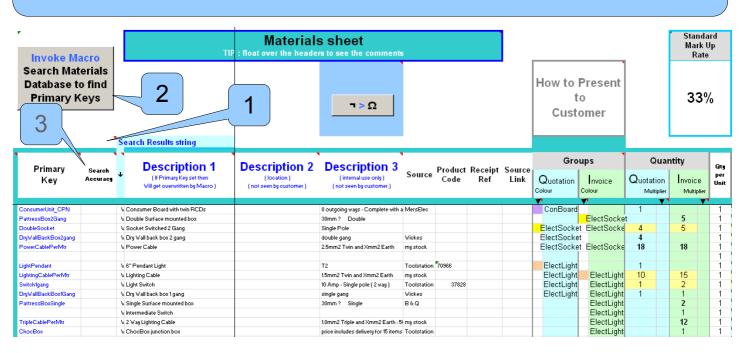
The first section is the Labour Analysis Hours – showing which tasks overran and which were within time.

The Second section is an independent Time Calculator – typing in the start time and end times with lunches produces the final column which is expressed in decimal hours. The entries here are completely independent of all other information on the row.

The Third section is the way that the software detects changes to the spreadsheet between subsequent presses of the 'Populate Destination' macro (either populating the Quotation or the Invoice). This can be ignored as it is part of an internal mechanism.

As the macro operates it puts copies of the text etc ... into these store columns. When the contents of these columns differ from the originals it can be assumed that it is the originals that have changed. And thus the user can be prompted to 'Press the Macro' again.

7 – Materials Sheet in Detail



This the left hand section of the Materials Spreadsheet.

When the spreadsheet opens up for the first time – it gives you some hints – if you want to see them again them put the value 4 into this cell.

You can either specify materials that you know are in the Materials Database – or you can type in the fields yourself.

Using the Primary Key entry system

1

2

3

- You need to type in the Primary Key,
 - Group,
 - Group Colour (optional) and the
 - Quantity (with an optional Multiplier)

You then can press the Search Materials Database Macro

 Using the Direct entry system
 (as in the third to last entry – Intermediate Switch)

 You need to type in the
 - Group,

 - Group Colour (optional)
 - Quantity (with an optional Multiplier)

 - Qty Per Unit (normally one – probably don't have to change this)
 - Units (whether it be Bags, Packs, Kgs or just Units (ie No Units))

 - Unit Price
 - Unit Price

- Has the price that you have specified Included VAT or not.
- MarkUp Rate (are you going to use the standard Mark Up Rate Or Another)

So you can see that it is much easier to use the Primary Key system of data entry – you just need to get used the nomenclature of the Primary Key

PRESS NE	1		TIP	Materials : float over the heade	
Search Ma Database Primary	to find				Ω < Γ
		Se	arch Results string		
Primary Key	Search Accuracy	÷	Description 1 (If Primary Key set then Will get overwritten by Maoro.)	Description 2 (location) (not seen by customer)	Description 3 (internal use only) (not seen by customer)
ConsumerUnit			QtuPossibilities-23, 474-ConsumerUnit100A		

Quantity Of Possibilities – QtyPossibilities

When a Primary Key is not sufficiently precise the searching macro – changes the colour of the Primary to **RED** and gives you a list of possible matches (starting with the most likely matches) - all you then have to do is select the number associated with the correct match and re-invoke the Macro.

Search Accuracy is an obsolete field - that is no longer used

7.1 – How to Define a Primary Key

HOW TO DEFINE A PRIMARY KEY

It is made up of SubWords, in software writing often termed 'Camel Text' - due to the humps in the middle of the word :-

- Each Sub Word MUST start with a Capital.
- You can't start a Primary Key with a Number even though you might be tempted ... 13AmpPlug has to become Plug13Amp.
- It makes no difference the order in which the SubWords are placed. (LightPendant and PendantLight are handled in exactly the same way and no preference is given to either)
- It has sophisticated search comparisons it knows that 2gang = Double and that Exterior = Outside etc. (for a full list of comparisons have a look at the bottom of the Materials sheet in the MaterialsAndTasksDatabase)
- If you know the row number of the item in the database you can specify it directly but only use this as a short term method as the materials database could be added to / deleted from and the numbering would change. This is useful after you have been presented with a list of near misses - and you can then just type in the number associated with the material that you want to select.

ConsumerUnit_CPN PattressBox2Gang best to look down the Materials sheet of the DoubleSocket MaterialsAndTasks Database DryWallBackBox2gang PowerCablePerMtr LightPendant LightingCablePerMtr Switch1gang DryWallBackBox1Gang PattressBoxSingle software TripleCablePerMtr **ChocBox** RadiatorSingle600mm12 RadiatorLockShieldWithE preceding number as one SubWord TRV PipeElbow15mmEndFee - The format for Tees :-Trunking25mm16mm Tee221522 PEXPipe12mmPerMtr composition. Lagging MainsSmokeAlarmDetec

You can include '_' (underscores) to make your Primary Key more humanly legible they are ignored by the software. BUT Don't use two or more consecutive ones.

LightingCable PerMtr LightingCable_Per_Mtr 🗸 LightingCable PerMtr *

To best get a feel for the way of describing Primary Keys it is

On the left (here) are some examples of PrimaryKeys

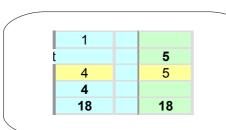
- There are some combinations of Capitals that are permitted - but these are special words - such as CPN (a manufacturer) OR GU10 (a type of light fitting) - If you want to include others you'll have to tell us - and we can incorporate them into future releases of the

(Again these are listed at the bottom of the Materials Database)

- 600mm and 15m are treated as single SubWords the search macro has a list of units which it recognises and then treats the units and the
- When we define Tee221522 we imply that the branch is the 15mm (With Tees don't be tempted to type in Tee22mm15mm22mm - as it treats each 22mm as a SubWord and gives double the importance to (a lot of unnecessary weight) to SubWords with '22mm' in their

7 – Materials Sheet in Detail – Left Hand Side





The Quantities are shown :-

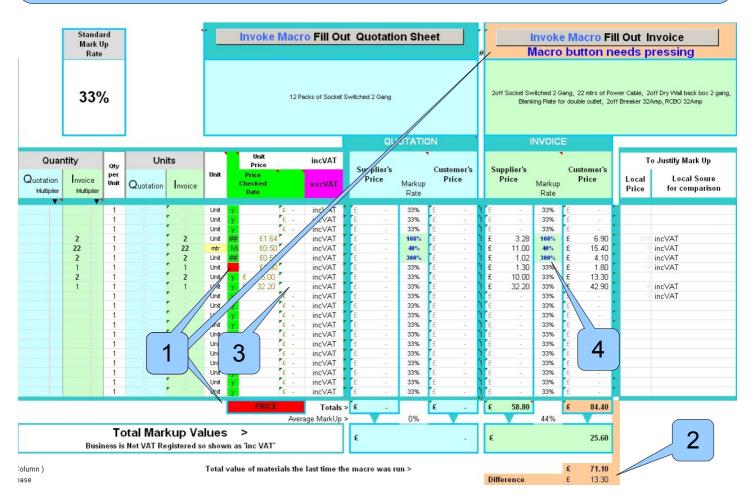
- In Bold when there are greater than 1

- With a Yellow background when there are different on the Invoice to the Quotation

Description 1		Gro	oup	s	Quantity					
(If Primary Key set then Will get overwritten by Macro)		Quotation		nvoice _{lour}	Quota ^{Mul}	tion tiplier	Invoid Multi			
Socket Switched 2 Gang	+	Sockets			4	5				
Material 1							8			
Material 2		Ring								
Material 3								2		
Material 4				Box		2	3			

Some examples of Orange shading because the software has detected that some information is missing





This is the right hand side of the Materials Sheet

1

It shows the materials required for the generation of an Invoice, the fourth item hasn't been 'Price Checked' and thus it shows in **Red** and makes the bottom '**PRICE**' appear in **Red** as well. Your choice is to either guestimate the price, or to obtain the correct price and type some detail in the little red box. If you look at the other entries there are of the form 'Feb09 - The text is best entered with a leading Apostrophe otherwise the spreadsheet will try and determine the entry as a date and prompt you to correct the entry.

[The omission of a ' Price Checked' affects the colour of the background behind the macro button and is also filtered through to the Quotation and Invoice sheets.

- The values **or** the wording that the customer sees on the Invoice sheet have changed 2 since the Macro (at the top of the screen - the one populating the Invoice sheet) was last run (if it has been run at all). From the bottom of the screen - you can see that it is the values that have changed and the financial difference between the two runs of the macro is £13.30. There is a way of blocking these warning messages on the Destination sheet - please have a look at those sheets for more detail.
- If the price has jumped between the time of the Quotation and time of the generation of 3 the Invoice – then this column can be used to show the Invoice-able price. This is an unusual situation – but the Search Materials Database will populate this field if it considers it appropriate. Or the value can be typed in manually.

(If it is left blank then the value of the previous column is used)

7 – Materials Sheet in Detail – MarkUp Rate

MarkUp Rate

If you are using the Primary key way of specifying materials then when the material is pulled up from the Materials database the Mark-Up value is assessed.

If the Mark-Up rate in the Material's Database is not the Standard Mark-Up rate (as specified in the Material's Database) then the Mark-Up rate is copied from the Materials Database.

If the mark-up rate of the item is the same as the Standard Mark-Up rate as specified in the Material's Database, then the Standard Mark-Up rate is applied to the item. But it is the standard Mark-Up rate as specified in the EQIC Spreadsheet. So effectively the rate could have changed – if the Standard Mark-Up rates differs. The Material's Database versus the EQIC Spreadsheet.

As is mentioned in more detail in the MandT database documentation (in the following pages) the MarkUp can exceed 100% - as in the case here – where we have purchased stock in bulk and in advance and managed to obtain it at a vastly reduced price compared to going out and purchasing it locally as a single item for this invoice. So we feel justified in putting a 300% on some items – and can justify this (should we need to) by comparison with locally obtainable stock – which can be specified in the fields to the right of the main section - this (unusually) hasn't been done in this case.

We will now look at the Materials Sheet within the MandT (Materials and Tasks) Database. You will notice the similarity of the format of the two sheets – this is no accident – once you have understood the format of one the sheets then the operation of the other sheet is easier to understand.

Not shown on the main graphic (but shown below) is the individual comments that are generated each time a macro is changed. The comments show the individual pricing components including how the Mark Up rate affects the details of the pricing. So when you have a quantity specified greater than unity and a VAT rate – it shows the mark up rate at each juncture. The values don't marry up precisely because of the way the rounding up is calculated – (so the Supplier's Price is sometimes shown slightly higher) – the Customer's Price values are always rounded up the nearest 10p. (or in other currencies they round up the nearest $1/10^{th}$ of a unit – Another example of the completeness of the software to deliver as much information to you as possible at every stage of the process).

1	NVOICE	E			-	
Supplier's Price	Markup Rate	Customer's Price	To . Local Price	Justify Mark Up Local Source for comparison	Recommended	Deduc fron Stoc
£-	33%	£-				
£-	33%	£-				
£-	33%	£-	£ 1.64	* VAT = £1.89		
£-	33%	£-	C 4 00 1	* MarkUpRate = £ 3.9		
£-	33%	£-		2		
£3.77	108%	£7.90		$arkUp = \pounds 2.04$)		
£-	108%	£-	£ 3.92	* Qtv (2) = £ 7.85		
£-	33%	£-	(Ma	*Qty(2) = £7.85 arkUp = £4.07)		
£-	33%	£-	L			_



The MaterialsAndTasks Database is a separate Workbook that acts as a database of information for the EQIC Customer workbook. Some customers have reported finding it useful in it's own right. There are two sheets in the workbook. First of all we'll look at the Materials Sheet ...

Primary key Use (see below for rules on how to specify) • WashbasinOvalAltas Ov WashbasinTap VK WashbasinTapSMonoblock VK WashbasinTapSMonoblock VK WashbasinTapSMonoblock VK WashbasinTapSMonoblock VK WashbasinTapInserts VK WashbasinTapInserts VK WastbasinPlugWaste&Overflow VK WasteStraight32mm VK WasteElbow32mm 32 WasteElbow32mm 32	vision 9 - November 2008 these "greged out" columns as you wish Description 1 (as seen by customer) val wash basin - Attas Vanity Basin from Fro ashbasin Taps ashbasin Taps ashbasin pilog , waste & overflow aste Strajoth Coupler - 32mm aste Strajoth Coupler - 32mm	Column B Colours (DoubleClick Cell 'F2' to invoke revis Description 3 (not seen by customer) (internal use only) oinset into worktop similar tops to the Bath ones McApine Bottle	Source York & Yo Toolstation YorkYoun	Code ung 47155 74608	original Receipt Ref	Sto ReOrder Level	ck	low for more d Source Link / Price Check	Qty Bequired More than one 1 1	Qty per Unit	1	Unit Unit Unit	Unit Price Price Checked D/e y 75.00 £ 42.58 £ 35.41 U.£ 8.00	8 in 1 in
(see below for rules on how to specify) View WashbasinTap View WashbasinTap View WashbasinTapSMonoblock View WashbasinTapInserts Wiew WashbasinTapInserts Wiew WashbasinTapInserts Wiew WashbasinTapInserts Wiew WashbasinTapInserts Wiew WashbasinTapInserts Wiew WasteStraight32mm Wiew WasteStraight32mm Wiew WasteElbow32mm 32 WasteElbow32mm 32	Description 1 (as seen by customer) val wash basin - Altas Vanity Basin from Fro ashbasin Taps ashbasin Tap Inserts ashbasin Tap Inserts ashbasin Tap Inserts ashbasin plug , waste & overflow aste Trap - 32mm	Description 3 (not seen by customer) (internal use only)	Source York & Yo Toolstatior Toolstatior YorkYoun	Code ung 47155 74608		ReOrder Level	Actual 0 0	1.1	Required More than one	per Unit 1	of Units	Unit Unit Unit	Price Price Check 0 y 75.00 £ 42.56 £ \$5.41	in ev 0 in 8 in 1 in
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WashbasinTap WW WashbasinTapsMonoblock WW WashbasinTapinserts WW WashbasinTug/VasteSOverflow WW WasteTrap32mm WW WasteStrap132mm WW WasteStrap132mm WW WasteStrap132mm WW WasteStrap132mm WW WasteStrap132mm WW Stellbow32mm 32 WasteStrap160w32mm WK	ashbasin Taps ashbasin Mono Block Tap ashbasin Tap Inserts ashbasin plug, waste & overflow aste Trap - 32mm	similar tops to the Bath ones	Toolstation Toolstation YorkYoun	47155 74608		0	0		1	1	1	Unit Unit	€ 42.58 € 35.41	B in 1 in
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WashbasinPlugWaste&Overflow Wit WasteTrap32nm Wit WasteStraight32mm Wit Waste35Bend32mm 32 WasteBlow32mm Wit SweepedTep 22mm 32	ashbasin plug , waste & overflow aste Trap - 32mm	· · ·		g		1							/	
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WasteStraight32mm W/w Waste135Bend32mm 32 WasteElbow32mm W/w SweepedTep22mm 32		McAnine Hottle			L	0	0		1			¥/		in
Waste135Bend32mm 32 WasteElbow32mm Wa SweepedTep-22mm 32	aste Straight Coupler - 32mm		York & Yo		L	1	1		1	1		/ /it	y£ 4.00	
WasteElbow32mm Wa SweepedTep22mm 32		Black , Grey , White	Wickes	431-921		4	4		1	1		Anit		in
SweepedTee 20mm 32	mm 135 Deg Bend	Black , Grey , White	Wickes			4	4		1	1		Unit		in
	aste Elbow(s) - 32mm	Black , Grey , White	Wickes	431-922		4	4		1	1	+1 $+$	Unit	y £ 0.58	
	mm Sweeped Tee 3		Wickes			2	2		1	1		Unit	£ 1.00	
Pipeszniniz	this pipeling 2.11	2 mtr lengths	Wickes	431-901		0	0		1	1	/ 1		<mark>l∉y</mark> £ 0.89	
	mm piping - 3m	3 mtr lengths	Wickes	431-981		2	2		1	/	$\int 1$	3mtr	£ 4.28	
	mm Pipe Brackets		Wickes	431-920		10	10				1	The second secon	y £ 0.58	
	tendible P Shaper Naste Water Trap 32mm		Wickes	431-981		2	2			A	4	Unit	£ 6.20	
	ashbasin Securing Bolts		YorkYoun	431-922		4	4			4	[1	Unit	£ 4.00) in
	th & Kitchen Sink (40 mm)													
đath Ba						0					\nearrow	Unit	£ 140.00	
	th Tap Inserts	similar tops to the Washbasin ones	YorkYoun			1	1		1	1		Nt	£ 8.00	
	p Flexi 22mm	250mm ?	Wickes	420-902		2	2		2	1			V £ 4.79	
	p Flexi 22mm - 500mm		York & Yo	ung		0	2		2	1	2	//**	£ 3.50	
	p Flexi 22mm - 1m	White nylon braiding	B&Q			0			1		V	Unit	y 6.98	
	th plug , waste & overflow					0			1	5	(Unit	£ 3.00	
	aste Trap - 40mm		York & Yo			1	1		1	-5	1	Unit	£ 3.00) in
	aste Trap - 40mm Shallow type		Wickes	431-914		1	1		1		1	Unit	y£ 4.99	S inc
	aste convertor 40mm > 32mm mm 135 Deg Bend					3	3		1	<u> </u>	1	Unit	M £ 0.74	4 exe

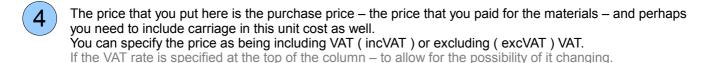
The Search Materials Macro from the template searches for matches (or near matches) of the Primary key.



3

If the macro suggested a near match then the number associated with it is the row number from this spreadsheet – so you don't have to type in 'BathTapInserts' you just have to type in the number 52. But don't rely on it being the same number for too long – Don't start remembering particular numbers for particular products – because as you add or delete rows in this workbook then specific number will change. So only use it as a short term quick reference.

By leaving the Primary Key empty and putting text in the Description1 you can create a Title.





Either put a 'Y' or a 'Date when the price was last checked' in the Price Checked column. If you leave it blank the price appears in Red in this spreadsheet and Red in the EQIC Workbook. Use a leading (') character so that the spreadsheet treats the entry as Text rather than a date.

Database Version :	Revision 9 - November 2008	Column B Colours > (DoubleClick Cell 'F2' to invoke revisio		original		See below for more de	etails of code	3S			
Primary key (see below for rules on how to specify)	Use these 'greged out' columns as you wish Description 1 (as seen by customer) 	Description 3 not seen by customer) use only)	Source Produc Code	t Receipt Ref	Stock ReOrder Level	Source Link I Actual Price Check	Qty Bequired More than one	Qty per Unit	Qty of Units	Unit	F P Che D
			4	. Nº	4						
SplitBoardConversionKit	Split Load Conversion Kit for Consumer Board		Smithdown Electric:		0	0	1	1		Unit	£
leterTails16sqmm1m	Meter tails : 16 mm2	Don't rorger to toouble this : Brown / B			0	0	2	1		Unit	J€ €
leterTails25sqmm	Meter tails : 25 mm2	Don't forget to double this : Brown / B			0	0	2	1		Mtr	J€ €
1eterTails25sqmm1m	Meter tails : 25 mm2	One meter lengths : Twin pack	Toolstation 82458		0	0	2	1		Unit	0 £
onnectorBlockSingle	Connector Block	100 Amp Single (must be in pairs)			0	//	1	1		Unit	JL £
ConnectorBlockDouble60Amp	Connector Block	60 Amp Double			0		1	1		Unit	Jt £
onnectorBlockDouble100Amp	Connector Block	100 Amp Double				0	1	1		Unit	0 £
CensumerUnit_CPN	Consumer Board with twin RCDs	8 outgoing ways - Complete with a se			$ \rightarrow \langle $	1	1	1		Unit	Sr £
CTI_RCD	Extra RCD for Lighting Circuit		Toolstation 90500			1	1	1		Unit	A.£
CTI_RCBO_6Amp ConsumerUnit40Amp2slotRCD	CTLRCBO 6 Amp for Liekting circuit RCDs Shower Protection	MCB and Isolator	Harbord		4	0	1	1		Unit	
RCD30mA25Amp	RCD 30mA 25 Am	INCD and Isolator	Smithdown EB2530		0	0	1	1		Unit	y x
RCD30mA40AmpContactum	RCD 30mA 40 Amp	Contactum	SmithdowrCMB4003		0	0	1	1		Unit	O E
RCD30mA40AmpContactum	RCD 30mA 40 Amp	Type ?	Wickes	972	0	0	1	1		Unit	U E
RCD30mA63Amp	RCD 30mA 63 Amp	Type :	Smithdowr EB2633	0	0	0	1	1		Unit	S. F.
RCD30mA63AmpContactum	RCD 30mA 63 Amp	Contactum	SmithdowrDMB6303		0	0	1	1		Unit	0.6
RCD30mA80AmpWickes	RCD 30mA 80 Amp	Type ?	Wickes	912	0	0	1	1		Unit	U 8
RCD30mA80AmpWylex	RCD 30mA 80 Amp Wylex	For rail mounted board	SmithdownElectrica	1	0	N (1)	1	1		Unit	Fee
RCD30mA80AmpSquareD	RCD 30mA 80 Amp SquareD	i of fairmounce board	Toolstation 26773			0	1	1		Unit	0.6
		Contactum			-7×1	6	1				O.F.
RCD30mA80AmpContactum	RCD 30mA 80 Amp SquareD RCD 30mA 80 Amp RCCB's RCCB 30mA 80 Amp	Contactum	Smithdowr2MB8003		3			1	1	Unit Unit Unit	

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The colour of the first column identifies whether they have been any significant changes to this entry since the last revision of the database.

You thus know that the row identified has had some changes made to it – it could be the :- **Price**, **Description**, **PrimaryKey** OR **MarkUp rate** (to be discussed later) The precise changes are identified further to the right of the sheet (See next page) (only the important changes are highlighted – the source for example is not considered significant.)

The number of **yellowed** rows this gives you a head ups on how many changes there are in the database – you may decide that it is time to UpRev (Up Revise) the database.



UpRev – Up Revise the Database.

The textual aspect of this process is completely manual – you type in the details of the date and the Revision number into cell F2.

You then invoke the Macro. It then goes down the database and re-stores the information in the stored area which in turn changes each Yellow blob back to a Cyan blob. (information is stored in columns to the right – viewable on the next pages)

UpRev'ing does both sheets of the MandT (Materials and Tasks) database, invoking the macro on either the Materials Sheet or the Tasks Sheet affects both sheets – it is just two places to invoke the same macro. Prior to UpREVing in would be a good idea to SAVE AS a version of the database, then when you as soon as you UpRev the software you could resave using the SAVE AS option to say it back to the original filename. This is just good housekeeping.

[The macros of the EQIC software are normally password protected for the security of our intellectual property – but the macros contained in this spreadsheet have been left open to allow you to see how they operate.]



This Stock Control hasn't been implemented – when you use materials it was intended they are drawn from Stock and are highlighted when the stock level drops below a ReOrder limit. [If you think this would be a great feature then please tell us and depending on feedback we'll judge as to whether we will incorporate it.]



The Link system is really good way of having weblinks set up in the Materials Database that first get copied over to the Materials sheet, and then subsequently onto the Destination sheet (either the Quotation or the Invoice Sheet). Section 10 of this guide refers to Open Office's PDF setup – to ensure that you produce PDF's with active links.

			Busine	ess i	s	not V	AT Re	gistered	VAT Rate	Sta				p Rate		FALSE		
or more c	letails of	codes							15.0%	28.00%								
Stock		Qty Required					Unit Price	incVAT							Local Sourc	e for comparison		
ReOrder Level	Actual	Source Link <i>I</i> Price Check	More than one	Qty per U	6	df ts	Unit	Price Checked Date	excVAT		plier's rice	Mark up Rate		Price To ustomer	Price to trim mark-u		Reco Source Details	mmended Markup
4	4		1		1	1	Unit	£ 4.00	incVAT	£	4.00	50%	£	6.00	£-	incVAT		
0	-		1	8	1	1	Unit	€ 140.00	incVAT	£	140.00	28%	£	179.20	£ -	incVAT		-
1	1		1	6	1	1	Unit	JL £ 8.00	incVAT	£	8.00	28%	£	10.30	£ -	incVAT		
2	2		7	_	1		it	4.79	T	£	9.58	28%	£	12.30	£	VAT		
0	2	1	2	2		3	it	4 50	5	£	7.00	28%	£		£			
0	0			2		U		5.98	J	£	13.96	28%	£		£	- JVAI		
0			1	<u>.</u>	1	1	Fit	£ 3.00	Inc ST	£	3.00	28%	£		£ -	VAT		
1	1		1	2	1	V	UNY	£ _ 90	incVA	£	3.00	28%	£		£ -			
1	1				1	1	Unit	y € 4.9⊾	IncVAT	∕€	4.99	28%	£		£ -			
3	3		1		1	1	Unit	M.€ 0.74	excVAT	£	0.85	50%	£	1.30	£ -			
3	3		1		1	1	Unit		INSVAT	£	-	28%	£		£ -			-
4	4		1	-	1	1	Unit	1.00	incVAT	£	-	28%	£	-	£ -			-
2	2		1		1	1	Unit	£ 1.00	IncVAT	£	1.00	40%	£	1.40	£ -	incVAT		

Normally this Qty is set to unity – but occasionally things are sold in multiples and it is impossible to buy the single item – for example :- Taps (2), Cable Clips (10), Gland Locknut kit (5)

If the Units are set to 'Unit', then it doesn't mention the units – it would say 5 screws rather than 5 packs of screws.

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If the price is unchecked then leave this field blank – making it show RED – and highlighting the checking status of the material in the Materials sheet of the customer's file. Alternatively if you put something in this field such as 'Aug09 – Including the apostrophe so that the

spreadsheet knows it is left as a text entry, then it will be shown in GREEN and is not highlighted as needing attention when it is sucked up into the Materials sheet of a customer file.

Use the Pull Down Menu to select Inc or Exc Vat and this will change the VAT status to being IncVAT or ExcVAT. This is the status of the price that you have specified in the previous column. This is independent of whether your business is VAT registered or not.

- This column shows the raw price to you. This depends on whether your business is VAT registered
- Business is not VAT Registered and IncVAT is specified then it is just a copy of the previous value.
- Business is not VAT Registered and ExcVAT is specified
- Business is VAT Registered and IncVAT is specified
- Business is VAT Registered and ExcVAT is specified
- then value is including VAT. then value is excluding VAT
- then it is just a copy of the previous value.

[THIS FIELD IS FOR YOUR INFORMATION ONLY - It is here mainly to keep the format the same as the EQIC Customer file. It has no bearing on the price being copied over to the Materials sheet.]

For the above field to show the correct value this spreadsheet has to be told whether the business is VAT registered or not. Use the Pull down selection on this cell to change the information.

It is not really advised that you print out the Materials Sheet, but if you really want to then only print out Column A to AB

The other columns of this sheet are provided so that you can demonstrate (to yourself) that the price you have charged (with the MarkUp that you have charged) are reasonable compared to a local source – where your customer could reasonably be shopping in the local area. For example; we (AllertonEPS Electrical Plumbing Services) buy stuff from <u>Toolstation.com</u> – and keep it in stock – so that sometimes our MarkUp rate can jump up to 100% and beyond - as we can reasonably expect that our customers would be price matching against local shops. This justifies our stocking costs.

Other columns that are not shown – monitor the changes of the key elements of the row to indicate whether a row should be highlighted as having been changed between revisions of the software.



Adding a Material

The easiest way to do this is to find a blank material row – you might need to select a row from elsewhere in the database and then paste it in and around the area of similar elements.

You need to create a unique Primary Key (the word 'need' – isn't an absolute 'need' – if you were to specify the same primary key twice then the macro would give you two options – with different row numbers for you to select which of the row numbers to use – this would alert you to the duplication of the primary key – so basically don't get too hung up about specifying the primary key)

Then you need to specify the rest of the information for the material that you are specifying...

We recommend that you save the MaterialsAndTasks workbook before doing this – just so that you can return to a pre-addition status – in case things get mucked up.

You might decide that this is a good time to up-rev the MaterialsAndTasks database – as the first column (which is shown in cyan – will be showing in yellow – showing that you have made changes to that particular row since the macro was last run).

8 – MaterialsAndTasks Database – Tasks Sheet

			columi ell 'F2' to invoke	n B Colours > revision macro		origina
Type of Entry	Primary Key is Specified	Primary key Description OR Labour Element	Groups	Engineer / Qty	Time Units (Hrs) / Price	Comment for this database only
100 - Leis	ure \ P	leasure Assignments				
200 - Con	structi	on Assignments				
		Assignments				
Task301 - Bath	room Ex		_Fan	Total Hours	5	
LabourElement		Quotation and Settir 2	_Fan		1	Group starting with a '_' are not included in the text but are included financially.
LabourEle, ent		Remove existing vent and create a rectangular hole in the plaster.	Fan		0.5	
LabourElement	\searrow	Open up the hole in the brick work to accommodate	Fan		0.25	
LabourElement		3 up the wall for the electric cable and locate it if.	Fan		0.5	
LabourElement		he back plate for the Fan Isolator Switch and again chase up the wall for the cable	Fan		0.25	
LabourElement		Shape the supporting plywood for the fan and secure it to the wall.	Fan		0.5	
LabourElement		Mount the plywood and the fan	Fan		0.25	
LabourElement		rs 4 tot 5 her 6 othe fan	Fan		0.25	
LabourElement		installation partic arly the upstairs lighting circuit)	Fan		0.25	
LabourElement		Tap inter the light g circuit and perform live tests	Fan		0.5	
LabourElement	/	Ensive that the the fan's automatic operation is as arricipated, argust as necessary.	Fan		0.5	
LabourElement		Tidy up and create invoice	_Fan		0.25	
Material Material	1	ExtractorFan12V TripleCablePerMtr	Fan Fan	1		7 8
Material	1	Fanlsolator	Fan			0
Material	1	DryWallBackBox1gang	Fan	1	-	
Material		Plywood Thin	Fan	1	£8	
Material	1	LightingCablePerMtr	Fan	3		From Transformer to Fan
Task302 - New LabourElement	Electric	Shower over bath (no drain work) - Surface moun Quotation and Setting Up Time	_ShowerElect	Total Hours	17	

(1)

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The Database Revision system works as described in the 'MandT Database – Materials Sheet' a few pages back in this guide. It operates on both the Materials sheet and the Tasks sheet at the same time. The Revision number refers to the MandT Database rather than the individual sheets within the database.

We have separated our tasks into groups separated by hundreds. This is a nominal separation of the tasks – and you are at liberty to create your own boundaries and names for those boundaries. The only thing to remember is that when specifying a task in the EQIC spreadsheet is to provide the word 'Task' with no space before the number of the task (such as Task302, or indeed Task932032). The quantity and the number allocations are entirely up to you.

There is a \boxtimes or a symbol in the first column – you can type "E" for expand and "C" for contract..

The row is either going to be a LabourElement (again no space) or a Material
(The author can't think of any other category - please advise us - if feel you differently)
This effects the colour of the row.

If it is a Material then the next field is either a \checkmark for a PrimaryKey being specified in the next field or to remain blank for a Description that is a bespoke item. (Such as a 'piece of Plywood' – that isn't specified in the Materials Database – in which case you provide a Quantity and the Price for that item.

The Group name you would think would all be the same for a given task – but they needn't. There are some items specified with a leading underscore – to signify that they are not to appear on a destination sheet (Quotation or Invoice).

There is another column (Added recently) – 'Optional Multiplier' just as the Labour and Material sheets within the template.

8 – MaterialsAndTasks Database – Tasks Sheet



Labour items are specified with an associated number of decimal hours.

Note that the software is not set up with sensitivity to whether there is a difference between the EQIC sheet and this MandT Database. The EQIC Labour Analysis sheet might be set up as DAYS rather than HOURS – yet the software will just populate 8hrs into the same location -making look like 8 days – if the EQIC Labour sheet is set to DAYS.

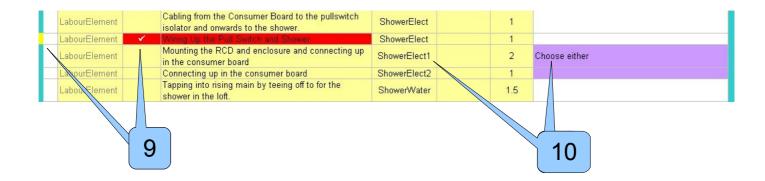
Please let us know if this is a problem as we can adjust the software to be aware of this difference if our users find it a problem.

Material items are either specified with an associated quantity (when they are specified using a Primary Key or when they are specified as a one-off material they are given a price and quantity.

There is no facility to include a Mark-Up rate for these one-offs and it the Standard Mark Up as specified on the EQIC Material Sheet will be applied.



Finally the last column is for 'Comments' – See below for options ...





Just to show the effect of accidentally typing in a Tick in an incorrect location.

Notice also that any changes are identified by the changing of the colour of the left hand border. (Exactly as happens in the Materials sheet). (This border gets restored to the CYAN colour when the Revision is upgraded).

We described earlier the unlikely occasion that different group names would be specified – but this shows just such an occasion. You must choose which option – depending upon the particular requirements that prevail.

You must delete the non-selected options to leave just the correct option. This deletion ought to occur in EQIC sheet.

(As from Rev 812 - not shown) - The Colours of the little boxes are shown to the left of the group.



To Add a new Task

The easiest way to do this is to find an existing task that best matches the new task that you are wishing to introduce and : -

- 'expand it' (so that you see all the elements of the task)
- select all the (whole) rows
- then paste the rows into an appropriate position on the sheet.
- Change the Task number and the details of the task and you'll be able to refer to it when you call up the task from the labour sheet of the customer spreadsheet.

We recommend that you save the MaterialsAndTasks workbook before doing this – just so that you can return to a pre-addition status – in case things get mucked up.

You might decide that this is a good time to up-rev the MaterialsAndTasks database – as the first column (which is shown in cyan – will be showing in yellow – showing that you have made changes to that particular row since the macro was last run).

8 – MaterialsAndTasks Database and DropBox



DropBox for MaterialsAndTasksDatabase

DropBox is available from www.DropBox.com (but please see later - for a personalised link)

It is a method of sharing files between computers / people around the world, and always having the most upto-date version to hand. Each computer / person has their own copy of the file and DropBox ties these various copies together – so that if one copy gets updated (saved) then all copies get updated (providing the computers are online). So every user has the benefit of the most up-to-date pricing etc ... as everybody is aiming for the same goal of improving the information for everybody else using the software.

If you don't want to join DropBox and just want to take a snapshot version of the MaterialsAndTasks Database then follow this link ...

http://dl.dropbox.com/u/13225507/MaterialsAndTasksDatabase.ods

And save the file in a directory on your harddrive – or preferably save a copy on your harddisk.

DropBox for an interface between you and your customers.

For bigger jobs: DropBox works really well as an interface between you and your customers – so that you can create directories for individual customers and put logs in each of them. I have a template log that I use (which you can have a copy of ...)

http://dl.dropbox.com/u/13225507/AllertonEPS_Log.rtf

Whilst I am recommending DropBox – I'll also mention Jarte a clever RTF editor file – with bags of facilites which makes keeping these RTF files up-to-date a doddle. <u>Www.jarte.com</u>



Your DropBox space increases because of your recommendations.

Initially you are allocated 2G of space – but each time you recommend DropBox to another user – they reward you by increasing your space allocation. - So if you could use the link below then I will get the benefit of an increase in my space allocation.

http://db.tt/mff9H6w

9 - Overview Sheet in Detail

Specific Information		<u></u>	
Certificate Date (if app)	14 Date		
Periodic Inspection Date (if app)	15 Date		
Has the Customer been presented with the documentation	Date Generated	641	
Date of Issue to Customer	Date		
Are Building Control to be Notified ?	Date Generated		
Date of Notification	Date		
Does the Company Seal have to be re-instated	Date Generated State which	company	Company
Date of Notification to Electric Company	Date		
Other Dates & access to other sheets			
Physical Layout	Date Generated	This sheet is avail	able in the Add-On workbook
BTU_Calculations	Date Generated	This sheet is avail	able in the Add-On workbook
Status Report	Date Generated		
Free Format Sheet	Date Generated		
Compliments Slip - Suitable for C4 Windowed envelopes	Date Generated		
MandT - Materials and Tasks Database	Path		Filename
Materials Database source :			MaterialsAndTasksDatabase.xls
Instrumentation Used			
Choose just one meter OR separates :	- Composite Meter.		
Manufacturer :	Beha		When specifying separates
Model Name :	Unitest Telaris 0100 Plus		use comma to separate
Serial No :	DT E0196XJ		Manufacturer, Model, Serial No

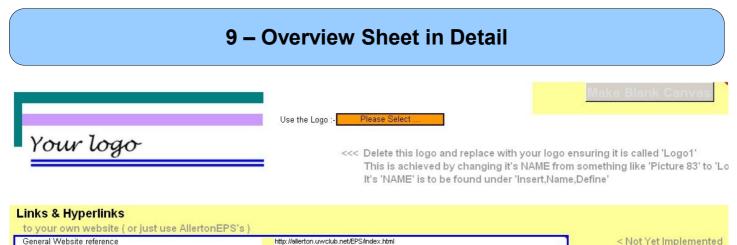
This section of the Overview sheet contains Dates and Instrument Used information.

The most important entry in this section is the 'Materials Database Source'. You must specify the filename and the path of the file (if it isn't in the same directory as the EQIC software). It is recommended when starting out to leave the MandT - Materials and Task Database in the same location as the EQIC software – thus avoiding the need to specify a path.)

Instrumentation Used section

This section is no longer used as the Instrument Information is specifically formatted for the locations on the ScheduleOfTestResults sheet.

You will have to type in the information into these locations and re-save your template file.



General Website reference Consumables (on Quotation and Invoice sheets)	http://allerton.uwclub.net/EPS/in http://allerton.uwclub.net/EPS/C	
Other Paths	Path	Filename
Retrieve Customer information from another spreadsheet		20080904_Darren_BathPanel_Rev809.
Once you enter the information for the filename it immediately a	a arabaa far tha anraadahaat anaa	ified. It then enone the other enreadehaet

if the macro licence has expired for that spreadsheet you will get a warning message relating to that other spreadsheet - just ignore this message

The logo software is more for our benefit as we want to be maintain the EQIC software without our logo being on every sheet – however when we are using the software for our customers for jobs, we want a quick way to broadcast our logo onto the necessary pages. This is the reasoning behind the logo macro – but you will find much better precision when placing your logo on the page yourself so circumventing the need for this software. Basically it will work for your logo – but we recommend that you don't use it AND instead place your individual logos on the necessary sheets yourself. You will need to re-save the template file once you have correctly positioned your logo on all the sheets that your customer see (and the Labour Analysis sheet – if you wish).

< Not Yet Implemented

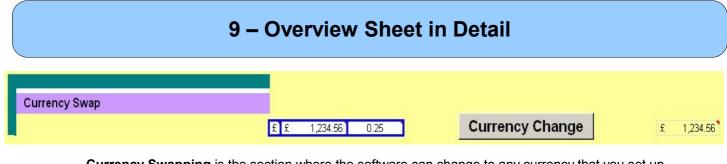
Links and Hyperlinks

As you can see from the comment to the right of the entries above - this aspect of the software has yet to be implemented. It is low down on our priority list of items on which to attend – but it hasn't been removed – to remind us of the need to address the issue.

The Retrieve Customer Information

This is a powerful way for collecting information from other customer files. As is so often the case; customers want more than one job, and this allows you to pre-populate the customer information from a previous customer file that you have available.

It also copies the Description of the job – which obviously is necessary to change. [As you open the previous customer file – the spreadsheet realises that there are macros contained within that spreadsheet – and gives you a warning about restricting the operation of those macros - (It doesn't matter whether you select 'Enable' or 'Disable') but it is just a bit confusing the first time this message appears – we haven't worked out a way of suppressing this message - [Any suggestions would be appreciated]]



Currency Swapping is the section where the software can change to any currency that you set up within the spreadsheetl. These are the steps :-

- 1 Put the new currency symbol into the first box. Your currency symbol should be on your keyboard as a key press OR a combination of key presses, otherwise you might need to use the Character Map to find your currency symbol.
- 2 Select the new currency : From the top menu Select Format, Cells, Number, Accounting, Symbol. The numbers in this cell are completely arbitrary and there just to present the format of the cell. (leaving the format unchanged just change the currency.)
- 3 Select a conversion rate it is the multiplication factor that is performed on every cell that contains a currency value (rather than a formula). When you hit the macro button – you are prompted as to whether or not you want to perform the multiplication factor.

Once all three aspects have been changed – the Macro button can be hit, and the spreadsheet entries are converted to the new currency.

[The cell to the right of the Macro button is a copy of the original format – this is needed so that the macro can rule out other cell formats when making the changes. Do not alter this cell's contents] A similar button is situated at the top of the MaterialsAndTasks database – the operation of that button is exactly the same, and the Currency Swapping needs to be done on that database at the same time.



4 – The VAT name changes for other currencies :- CT for the Japan etc ... So this needs to be typed in to the Overview sheet (higher up in the Business Details section) if you want to change from wording "VAT". [This change only happens on the Quotation and Invoice sheets – the sheets that your customer will see. It is too deeply embedded in other text on other sheets to 'bother' changing. (The word choice is careful here – because it is necessary to restrict the complexity of some of the sheets – and making these texts active would be unnecessarily burdening the operation of the sheets.]

If the VAT rate were to be needed to be changed then it needs to be changed in both the Overview sheet of the customer spreadsheet (the template spreadsheet) AND in the header section of the MaterialsAndTasks database. Failure to change both would mean that the pricing being dragged up from the Materials database would be at odds with the pricing shown within the Materials database itself.

9 – Overview Sheet in Detail

Page Numbering			P	age Numbers			
	Overview	1					
	Quotation	2					
	Invoice	3					
	Labour Analysis	4					
	Materials	5					
	Electrical Certificate	6	7	8	9		
	Schedule of Test Results	10					
	Reference Sheet	11	19				
	Minor Works	20	21	22			
	Schedule of Individual Test Results	23	24				
	Periodic Inspection Report	25	26	27	28	29	
	PAT_Testing	30					
	Free Format Sheet	31					
	Comp Slip	32					
	Additional Sheet	33					
	Fire Certificate	34	35	0			

The Page Numbering is to assess the page number of each of the sheets within the workbook. This is useful when assessing which number to output to a printer OR generate a PDF from within OpenOffice.

If you just remember Page 2 for Quotation and Page 3 for Invoice – that'll help you. Although if you have a really big Quotation then it will extend onto two pages and thus all the page numbers will be out.

So this is only a guide -

It is much easier to just highlight the area that you want to use and then either :-

'Print the selected area' OR generate a 'PDF from the selected area'.

(We have restricted the print area of the Overview sheet – so that the Overview sheet only prints out the first few rows and columns of the sheet – this means that the Quotation will always start on Page 2 (rather than Page 10 as it was previously))

10 – Electrical Sheets in Detail

The electrical certification sheets are largely self explanatory and little guidance is needed in the operation or the completion of the forms that comprise the Electrical Certificates. Knowledge of the contents of the forms is part of other training and thus anybody suitably qualified should have little problem with understanding the layout and the mechanisms behind the sheets.

The Type of the Earthing, Ze and Ze+ and Zpn (the latter two used to calculate the Prospective Fault Current) are truly global values - these will be broadcast to other sheets even multiple copies of the Electrical sheets – see 'Duplication' section later on in this document)

These are the Electrical Certificate / Reporting sheets :-

- Electrical Installation Certificate	(three pages	+1)
 Schedule of Test Results 	(one page)
 Minor Works Certificate 	(two pages	+1)
 Periodic Inspection Report 	(three pages	+1)
- PAT Testing	(one page)

where ...

+1 - If there is additional information or results, then the user might want to print the extra sheet at the end of the form (the user has to be aware that to economise on paper only the necessary pages need printing out.)

Non-standard entries are highlighted to the user. If you do not want to highlight these situations to your customer then you will need to go into the Conditional Formatting and delete the pertinent settings that are causing the formatting that want to remove.

On opening the 'ScheduleOfTestResults' sheet the first few times you get the message telling you how to handle some of the fields of the sheet. This will disappear after the third viewing of the sheet.

We are aware that the **Periodic Inspection Report** format is changing format (and name) in January 2012 – if you have paid the annual membership fee then you are entitled to free upgrade of the software to incorporate the changes that are to be announced in more detail in the near future.

10 – Electrical Sheets in Detail

IT IS GOING TO BE LABOURIOUS TO SHOW YOU ALL THE FEATURES AND SELECTIONS THAT ARE AVAILABLE ON ALL THE SCREENS

Instead we plan to show you a selection of the options available.

Other selections are able to guessed at – and there is always a comment available to be floated over with the mouse – that would advise how to proceed.

	This certificate is not valid if the serial number has been defaced or aftered	Advice / Options
This safety certificate is an important and valuable document which should be retained for future reference	ELECTRICAL INSTALLATION CERTIFICATE Issued in accordance with British Standard 7671 - Requirements for Electrical Installationsby a Domestic Installer enrolled with NICEC, Narwick House, Houghton Halp Fark, Houghton Regis, Dunstable LUS 52X	Ready for Editing Ready for cen input
DETAILS OF THE CLIENT Client and address Hattons Model Railway 364 Smithdown Road Liverpool Postcode L15 5AN	ADDRESS OF THE INSTALLATION Installation Hattons Model Railway address 364 Smithdown Road Liverpool Postcode L15 5AM	Show Tel : Show Graham : Choose Contact Information Show Graham : Certificate Number to be extracted from Filename
DETAILS OF THE INSTALLATION Extent of the installation work covered by this certificate New Ring established for	The installation i New - Downstairs - Front of Shop An addition 🗸	Choose colour of Form <u>RED</u> <u>GREEN</u> <u>PURPLE</u> Choose <u>Domestic Certificate</u> Electrical Certificate
DESIGN, CONSTRUCTION, INSPECTION AND TESTING	An attension 🔹	a 2 with the Details of any departures
skill and care when carrying out the design, construction, inspecting and testing, hereby CERTIFY that the for which I/WE have been responsible is, to the best of my / our knowledge and belief, in accordance with BS7671, 2006 as amended except for the departures, if any, detailed as follows :	I reason certificate. For the DESIGN, the CONSTRUCTION and the INSPECTION AND TESTING of the installation said work	Choose How many signaturees
Details of departures from BS7671, as amended (Regulations 120-01-03, 120-02.) None	Signature (CAPITALS) Date 22/01/200	9 Ω < Γ
PARTICULARS OF THE DOMESTIC INSTALLER	NEXT INSPECTION S - Enter interval in terms of years, months or weeks, as ap I RECOMMEND that this installation is further inspected and tested after an interval of not mo	J
Address 184 Mather Avenue Allerton Tel 0151 729 0095 Liverpool Mobile 07944 296136 Postcode L18 7HD		
NIC Enrolment No (essential information) 1 0 5 6 7 5	SCHEDULE OF ADDITIONAL RECORDS	Please move this little Picture to the left over the white rectand
* Where the electrical work to which this certificate relates includes the installation of a fire alarm system and / or an enremency limiting system () or a part of such systems) this electrical safety certificate should be accompanied by the particulat certificate(s) for the system(s)		and choose your loop to the top comer of this sheet from one of the apps on the Reference Sheet
This form is based on the model Electrical Installation Certificate shown in Appendix 6 of BS7671. As published by NICEIC Group Limited NOTES FO	Please see the 'Notes for Recipients' Page 1 of 5 R RECIPIENT This certificate is not valid if the serial number has DCP4/ 20090105	
THIS SAFETY CERTIFICATE IS AN IMPORTANT AND VALUABLI	been defaced or altered E DOCUMENT WHICH SHOULD BE RETAINED FOR FUTURE REFERENCE	Font Size suitable for Excel
	HE Page 1 of this certificate provides details of the electrical installation, together with the name UDING and signatures of the persons certifying the installation work and reviewing the results of inspection and testing on behalf of the Domestic Installer responsible for the work, details or	Eant Size suitable for OO

You are required to move the correct logo in the correct places on the sheet above. The two rectangular placeholders to be overlaid with the correct graphics. There are two different sizes; the larger one for the top of the form and the smaller one is put next to the Installer's address.

You just put a "T" in one of these three boxes – and a tick will appear in the correct box. You can always put a "T" in another box and the tick will move.

[Just above the 2 you see another Tick selection – as to whether to you want to display a Domestic Installation Certificate OR an Electrical Installation Certificate.]

[And just above that is the colour selection :-

2

If you select **RED** then the not only does the certificate change to the **RED** colouring but the 'Particulars of the Installer' change accordingly.

Like wise if you select the **GREEN** – the software changes the wording of the 'Particulars of the Installer' to 'Particulars of the Electrical Contractor'

And finally the colour **Purple** changes the wording to 'Particulars of the Domestic Installer'.]

[Just below the **2** you see a selection as to whether you want to show two signatures or just one. Not yet fully implemented]

10 – Electrical Sheets in Detail



5

6

This macro button appears on a few sheets and it allows the conversion of the word 'Ohm' to the ' Ω ' Ohms character. This is because the ' Ω ' Ohms character is difficult to generate from a keyboard. It only searches the cell under focus from the cursor. (Graphic is slightly out of date in this regard)

[Below that is another Tick box to select whether you want to show the Customer's telephone number and other details - These options are selectable because if you want to be absolutely faithful to the NICEIC format, these fields don't exist on the NICEIC Certificates.]

Open Office Font Size of Headers

This option was made available when the software was being opened up in both Excel and Open Office – now that the software can be exclusively handled by Open Office – this macro has been removed.

The first selection of the Right Hand pane is the selection as to whether you want to print out this form with Blue Text entries (as shown) or do you want to print out the certificate to manually hand write out the details.

This used to be called 'White Out Mode' – which has hasn't been adopted for a long while and might not work entirely correctly.

Choosing the Certificate

- Choose the colour (Red, Green or Purple) that not only changes the colour but also changes every mention of the contractor.
 Approved Contractor ,
 Electrical Contractor or
 Domestic Installer .
 - Choose whether you are wanting to generate an Electrical Installation Certificate or
 - a Domestic Installation Certificate .
 - Choose whether you want the NICEIC wording on the certificate.
 (not shown use this option for any other scheme other than the NICEIC the logos can be collected from the Reference Sheet)
 - You also need to choose (obviously) whether you need an Electrical Installation Certificate or
 - a Minor Works Certificate.

So you can see that any combination is possible depending on your selections – an Approved Contractor can issue a Domestic Installation Certificate, or an Electrical Contractor can issue a Minor Works (non – Domestic) etc ...

The rest of this form is considered self explanatory – if you think that it is necessary to elaborate on other aspects of the form then please let us know.

CIF	CUI	T DETAILS							1						TEST	RESUL	rs		
(Circuit Designation Distribution Circuits, insert 'D')	ing (thod sren)	f		cuit uctors	rection SZ674		Overcu	irrent		RCD	n Zs 3S7671			Circuit edanc	es	
(us	e the	word "Ring" where appropriate)	Fype of Wiring (see code)	Reference Method	Number of oints Served	(c:	sa)	Max Disconnection Time	Pro	otective	e Devic	e	Operating Current	Maximum Zs bermitted by BS7671		Circuits ured end to		All Cir	cuits
Designation	Position	- counting from Isolator	Type	Refere (see App	Points	live mm²	cpc mm ²	-	BS(EN)	Туре	Rating Amps	Capacity kA	mA	Dern W	r ₁ phase Ω	r _n neutral Ω	r ₂ cpc Ω	R1 + R2 Ω	R₂ Ω
Des	đ		2	3	4	5	6	S 7	8	9	Amps 10	11	12		14				17
		Origin (meter , ils)				25	16												-
	1	Alarm and Fire Alarm	Α	3	3	1.5	1	5	BS EN 60898	В	6	6		8.00				0.29	-
	2 3	RCD 1		•					BS EN 61008		63	6	30						-
	4	Upstairs Lights		6	5	1.5	1	5	BS EN 60898	В	6	6	30	8.00				0.82	-
	8	Downstairs Ring	Α	6	9	2.5	1.5	0.4	BS EN 60898	в	32	6		1.50	0.23	0.23	0.38	0.26	-
	5	Downstairs Lights	Α	6	5	1.5	1	5	BS EN 60898	В	6	6		8.00				1.75	-
	6	not used		•					BS EN 60898	В	16	6		3.00					•
	7	Kitchen Ring	A	6	8	2.5	1.5	0.4	BS EN 60898	В	32	6		1.50	0.14	0.14	0.22	0.18	-
	9	Upstairs Ring	Α	6	7	2.5	1.5	0.4	BS EN 60898	В	32	6	30	1.50	0.28	0.28	0.47	0.28	-
	10	Shower	Α	6	1	10	4	0.4	BS EN 60898	В	40	6		1.20			N	0.13	-
-	11 12	RCD 2							BS EN 61008		80	6		/					-
7	2	Location of consumer unit(s)				In the	hallwa	y 3		4		6	6		nation of er unit(s)		7		

This the **LEFT HAND PART** of the **ScheduleOfTestResults** sheet. It shows the flexibility of Open Office as a means to modify a layout to suit your own needs. [As this is a slightly old certificate (Pre Summer '08) it shows the Alarm and Fire wiring not protected by an RCD].

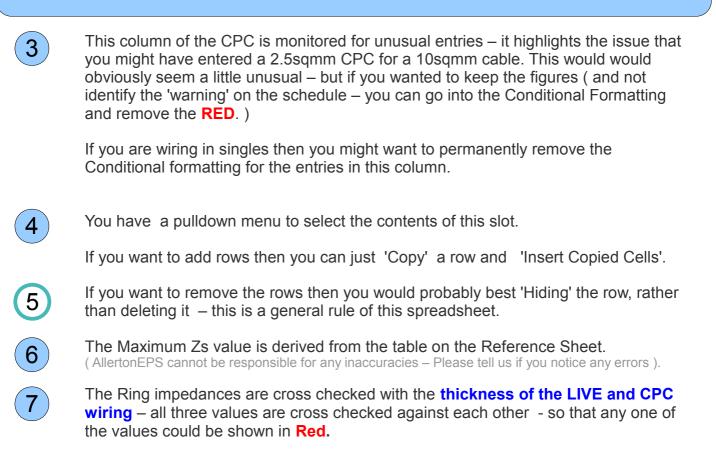


2

The wording of the Description is very useful. The word 'Ring' is demonstrated as needing to be mentioned in the Description – for the software to correctly shade out the cells horizontally across the row.

- If the word '**Ring**' is included in the description of a particular circuit then the Ring fields are not shaded (otherwise it is assumed to be a radial circuit and the Ring Fields are shaded out).
- If the word '<u>RCD</u>' or '<u>RCCB</u>' is included in the Description wording (such as 'RCD A') then the shading is intelligent, both the current row and the next row are shaded in the correct locations.
- If for example the word '**Spare**' or the word '**Empty**' is used then the slot is considered empty of any device (breaker or any other device).
- If the word '**Not Used**' is in the Description field then the slot is considered to have a breaker fitted BUT that there is no wiring downstream attached to the breaker.





										This certif if the seria been defa	al num	ber has	id	DC	P3/	20080207	
					8 _		DON	ESTI	CE	LECTR	CAL	INS	TALL	ATIC	N C	ERTIFICATE	
TEST	RESULT	S							_	Richard, Ha	atton M	odel Rai	lways,	Smithdo	wn Ros	ad, Liverpool L15	
		Circuit edanc	es		a	Insula Resist		2	Ŋ	.oop ince	F		nerati	on			
	Circuits of red end to	-	All Cire	cuits	Phase Neutral / Earth	Phase / Neutral	Phase /Earth	Neutral / Earth	Polarity	Earth Loop Impedance Z _S			Jorda		mumi	9 10	
r ₁ phase Ω	ř _n neutral Ω	r ₂ cpc	R1 + R2 Ω	R ₂ Ω	Ha MΩ	MΩ	MΩ	ΞΨ		α	1/2	x1 (30mA) rr	x5	Push butt	Den		
14	15	16		17	17122	19122	19122	18	19					22	23		24
																1	
			0.29	-	>200	>200	>200	>200	1	0.66						2	
											/					-	
			0.82	-	>200	>200	>200	>200	1	1.83	1	24	6	1			
0.23	0.23	0.38	0.26		>200	>200	>200	>200	1	0.58							

8

This is a deviation from the standard NICEIC form – it shows the customer's name and their address. We have found this a very useful identification – but there is a tick box so that you can remove this cross referencing to return the form to exactly the NICEIC form format. This selection is on the far right of the sheet.

9

Put a 'T' or a 'C' in the column and the software will convert this to a Tick (in blue) or a X (in Red).

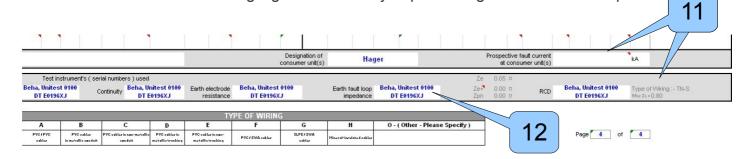
You have to manually select to merge the cells – this is the standard function of a spreadsheet look for the symbol on the top toolbar –

for more information on this please refer to the spreadsheet's Help file.



As you might expect ...

The software will highlight the value if you put too higher value in these position



The **Prospective Fault Current** is automatically generated; based on the Z_{e+} and Z_{pn} that you have entered in the the cells below it – these are also selected to be hidden – to make it a standard NICEIC form.

[This is because the meters that Allerton EPS uses more easily shows the Z_e values]

 Z_{e+} is the Z_e measured with multiple earths still attached – in other words it is used to calculate the PFC rather than the Z_e



11

Originally we had put the Meter information on the Overview page but because of the options available we have removed this automated method. Instead you must now type in the information about your meter(s) into the correct locations on this sheet.



To type a Carriage Return, providing you are editing in-cell :- Alt Gr & Return

(See more detail about this issue and other in Common Issues section later in this document)

9	B1	Shower		Α	100		10	4	0.4	BS EN 60898	В	40	6		1.1	5				
10		Not Used								BS EN 60898	в	32	6							
11		Kitchen Ring Sockets & Boiler	•	Α	100	:	2.5	1.5	0.4	BS EN 60898	в	32	6	30	1.4	4	U.45	0.45	0.78	
12		Sockets Ring Up		Α	100	:	2.5	1.5	0.4	BS EN 60898	в	32	6	30	1	4	0.45	0.45	0.81	
13	B5	Sockets Ring Down		Α	100		2.5	1.5	0.4	BS EN 60898	в	32	6		1.	4	0.50	0.59	0.82	
	-	0								•										
14	B6	Spare																		
14	В6	Spare																		
14	86	Spare																		
14	86	Spare	2.5	1.5	0.4	BS EN 608	398 B	32	6	1.44 0	.96 👱 .	88 1.50								
14	Be	Spare	2.5	1.5	0.4	BS EN 608 BS EN 608			6	1.44	_	88 1.50								
14	Be	Spare	2.5	1.5			398 B	32		1.44	.96 . 0.93	88 1.50								
14	Be	Spare	2.5	1.5	0.4	BS EN 608	398 B 398 B	32 32	6	1.44 <=	_	88 1.50								

There is conditional formatting for all the test result columns, entering a value that the software considers inappropriate would generate a Red background as shown above.



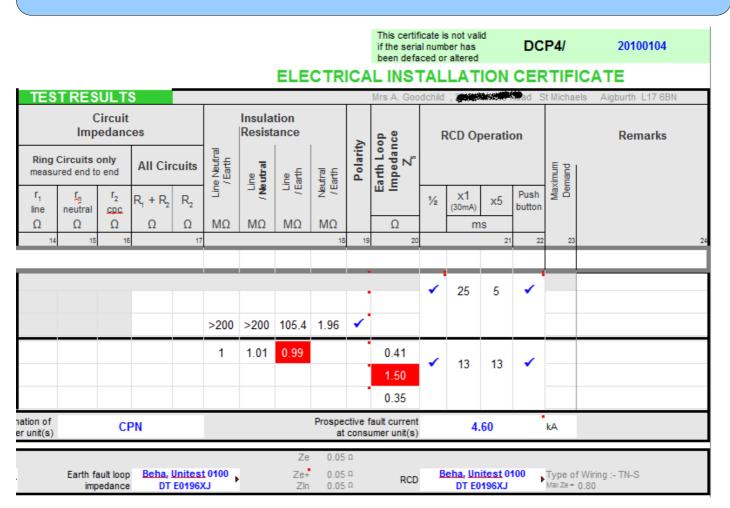
The range of acceptable values is visible on the pull down selection (the Validation Pull Down).

		Use the word 'RING' for Ring drcuits to stop the greying out of fields.
CIRCUIT DETAILS		Type 'Empty' or 'Spare' if there the slot is Empty as in 'Spare Slot'.
Circuit Designation	- 0	Type 'N ot U sed' if there is a breaker but no wiring connected.
(For Distribution Circuits, insert 'D')	Virin	Typing 'Spare (shower)' is perfectly acceptable.
Counting from Isolator	e of V	Adding '.' (Dot – creates a title.

	DB2b.		Origi	nal bo	ard in	the pa	ssagew	ay by the s	ide of t	he org	an		
1	R1 Kitchen Boiler	Н					0.4	BS EN 60898	В	10			4.60
2	R2 Toilet Heater	Н					0.4	BS EN 60898	В	10			4.60
3	R3 Kitchen Lights	Н					0.4	BS EN 60898	В	10		80	4.60

If a 'DOT' is found at the end of the Description then the software interprets this as a Header.

This is useful for complex installations where there are more than one board - but the user doesn't feel that is appropriate to have a whole separate sheet for each Consumer / Distribution board.

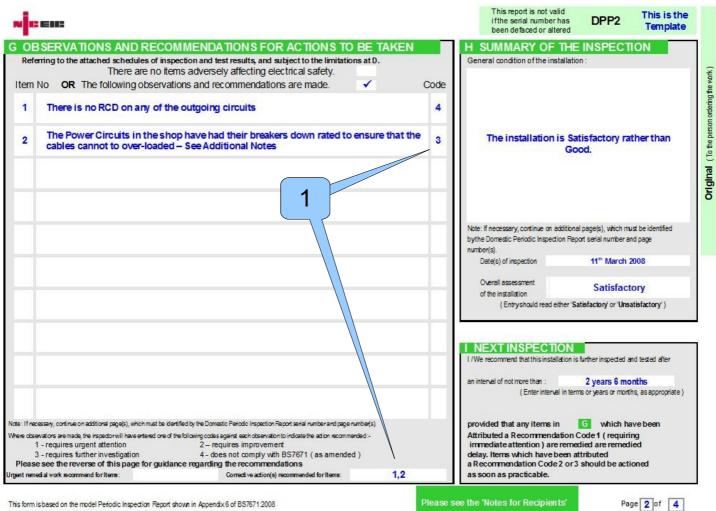


- This certificate is Green and this is an Electrical Installation Certificate, rather than a Domestic Installation Certificate. Both the colour and the wording are independently settable.

- The insulation resistance when it is lower than 1 ohm it shows up in RED
- The Zs value when it greater than the Zs max value it shows in RED
- The customer contact details are shown in grey at the top
- The Ze, Ze+ and the ZIn values are allowed to typed in and then from these figures the Prospective Fault Current can be calculated.
 NOTE : Depending on the location of the Consumer Board there can be a difference between Ze as measured at the Distributor's Electrical Cut-Out and the values measured at the Consumer Board the Prospective Fault Current is specified as being as AT THE CONSUMER BOARD, and thus a discrepancy between Ze and the PFC might want to identified in a particular installation. The automatic generation of the PFC is based on the Consumer Board being pretty close to the Distributor's cut-out.
- Also the Type of Wiring TN-S is also shown

(The last three can be selected to be invisible – if retaining the exact match to the standard format)

Periodic Inspection Report



As published by the NICEIC Group Limited Electrical Safety Council (Jan 2008)



Assigning Observations with Recommendation codes automatically populates the box(es) at the bottom of the sheet.

(If you leave a blank row and then add additional Observations then you are not prompted to fill out the Recommendation Code, and if the Recommendation Code remains unchanged (at zero) then it won't get included in the box at the bottom of the sheet. You can then use this form to add additional comments that are not specifically electrical in content. Such comments could be :-

- The boiler doesn't have bonding underneath
- The cold water tap is dripping in the sink
- The loft trap is missing

These are just examples – the facility has been made available to you – or you can choose not to use the facility.)

11 – Extras

11.0 - Sheet Details

Below is the list of the sheets and beside each is a description of whether or not it can be duplicated and exported cleanly (described later in this section) ...

Overview	×		Core
Quotation	\checkmark		Financial
Invoice	✓ □		Financial
Labour Analysis	✓ □		Essential for Financial
Materials			Essential for Financial
Elect Inst Cert	\checkmark	Electrical Installation Certificate	Certification
Schedule Of Test Results	\checkmark		Certification
Reference Sheet	×		Core
Minor Works Cert	✓		Certification
Periodic Inspection Report	✓		Certification
PAT Testing	✓	Portable Appliance Testing	Certification
Free Format Sheet	✓		Extra
Comp Slip	✓	Compliments Slip	Extra
Additional Sheet - Light Saving Calculator - BTU Rating - Areas and Volumes - Status Report - Distribution Board Layout Fire Cort	✓ ✓		Extra
Fire Cert	•	Fire Certificate (Not Yet Complete)	Extra

KEY

х

- These sheets are designed to be handled in the way described above.
- These sheets are core to the software and cannot be removed / duplicated issues will arise if handled in the manner described.
- □ − These sheets must be remain as sets − more on this later
- N/A These sheets have no links to other sheets in the software and
 - therefore by their very nature can be handled in the manner described above.

- The attribute at the end of the row describes the type of sheet – at the time of writing (Feb 2011) - the software would not work correctly if sheets were deleted – but in principle only those sheets described as 'core' would have to exist. Future development work on the software may make the software not susceptible to the deletion of sheets. This is certainly an area of development but might slow macros down to unacceptable speeds.

11.1 – Emailable Quotations. Invoices and Electrical Certificates

There are two ways to get information electronically transferred to customers. You can send an email attachment OR secondly if you only have a mobile number then you can send them an SMS message which includes a link to your website. The second option is rather harder work and probably best avoided if at all possible **BUT this first very easy** ...

Both methods rely on PDF file production – this is Adobe's Document production system that is secure and freely available. PDF (Portable Document Format) are (almost) unchangeable by the recipient – an important aspect of the integrity of the Quotation / Invoice or Electrical Certificate that is being sent to your customer.

Don't be tempted to send your customer the whole EQIC spreadsheet as all the details of your relationship with that customer would be laid bare, particularly your MarkUp values.

PDF Options	PDF Options
General Initial View User Interface Links Security	General Initial View User Interface Links Security
Range All Pages Selection 2 Images Lossless compression Quality 90%	Panes Page only Page Page only Page Page only Page Page Page Page Page Page Page Page
	C _pt in window C Fit width C Fit visible C Zoom factor Page layout C Default C gingle page C
Export automatically inserted blank pages Export Cancel Help	Export Cancel <u>H</u> elp

2 There are two ways to produce a PDF file – either by the Page (although identifying the page number is sometimes tricky – see below for a guide) OR by just selecting the area and then opening the PDF option and choosing 'Selection'. The second way is far easier in most cases. The only exception is the complicated multiple pages required for the Electrical Certificates and Schedules.

(At the bottom of the Overview sheet is a guide as to which pages are associated with which sheets – the problem is that this guide doesn't take into account the size of the preceding sheets, such as if the Quotation sheet were to extend onto two pages then the page numbering would be out. So the user must first generate the PDF and then check that the correct pages were translated into PDF format, and if necessary regenerate the PDF with the corrected pages numbers.

This is shown in detail in a Screen Cast www.allerton.uwclub.net/EPS/EQIC_Presentations/EQIC_S4.htm

(not yet implemented – May 2010)

11.1 – PDF Generation contd

PDF Options			×
General Initial View	User Interface	Links Secu	rity
Export bookmark	s as named destina	ations	
Convert documer	nt references to PD)F targets	
Export <u>U</u> RLs rela	tive to file system		
Cross-document links	5		
	reader application	1	
O Open with Inte			
	(3)		
		-	
	Export	Cancel	Help

For the PDF generator to work as you wish :-

 Tab1 (the General Tab)
 You need to type in Page 2 to select to generate a PDF of the Quotation. See details of the Overview Page for assistance with Page selection. Or you can just select an area and create the PDF from the 'selection' (the linking problem identified does not manifest itself).
 Tab2 (the Initial View Tab)
 You need to select 'Page Only'
 Make sure 'Convert document references to PDF targets' is ticked.

The last Tab is important so that the links work on your PDF documentation.

WARNING

We have identified a Hyperlinking issue that was present in Rev2 and is still present in Rev3 of Open Office.

On the Quotation and Invoice sheets – we have a hyperlink to '<u>examples</u>', but it only works when you request to convert all the sheets of the spreadsheet to a PDF file. If you are wanting just one sheet then it doesn't identify the hyperlink as a hyperlink.

It does if you give it the full address :- www.allerton.uwclub.net/EPS/index_consumables.htm - for example. But even then it is wrong because it specifies the 'seen' text as the hyperlink rather than the embedded address that is associated with the text.

So a word of warning really – just be aware of this issue that Open Office have yet to sort out, and if you do want to point to 'AllertonEPS Examples' then the only way to do it would be to specify the address :- www.allerton.uwclub.net/EPS/index_consumables.htm

11.2 – Additional Sheet

The additional sheet is where additional stuff such as Calculators are located. At the time of writing there are three calculators :-

- The BTU Calculator

- The Energy Saving Calculator (particularly in relation to light(s) being switched off in the early hours of the morning)

- The Areas and Volumes Calculator (for Tiling ...)

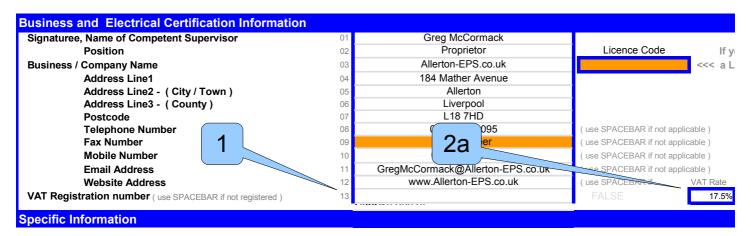
AND

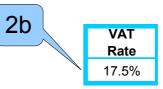
- The Status Report section

If you are wanting to present – say the Energy Calculator to a customer, then the procedure is to either hide or delete the other sections of the spreadsheet. Change the header (above the job number) using the pull down selector (or if necessary delete the validation and type in your own selection). You can select the section you want to make into a PDF file and then using the instructions associated with the PDF generation. This PDF file can then be sent to the customer by email.

If you have deleted the other sections of the spreadsheet then you could always **copy** this Additions sheet to a new workbook. (This is one of the very few times that we recommend deleting rows rather than hiding them). But the new workbook can then be saved and again sent as an attachment to your customer. The advantage is that the customer (provided that he / she has downloaded a copy of OpenOffice) can play around with your figures and trim the figures and see what difference their new figures make to the overall annual saving.

11.3 **–** VAT





On the Overview Sheet :

If your business / company is VAT Registered then put your registration number in this field here. If it is not VAT Registered then just put a space in here (to remove the orange background)

Whether your business / company is VAT Registered or not you are required to type in the prevailing VAT Rate.

In the MaterialsAndTasks Database :

In the header section of the Materials Sheet in the MaterialsAndTasks Database – you must type in the prevailing VAT Rate.

11.4 – Disseminating Information

This is background information ...

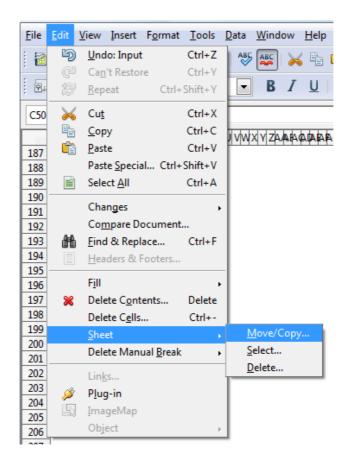
Disseminating information across the sheets of your workbook might seem like a very complicated way sharing information across all the worksheets of your workbook. But it has a number of advantages.

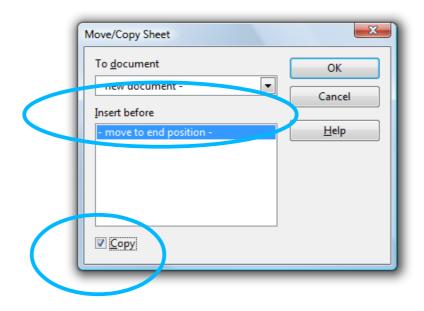
- Firstly you can edit any of the sheets, so for example if you were on the Quotation page and wanted to add a little bit to the Description field then you just have to edit there and the software will detect your changes and broadcast (disseminate) the information to all the other sheets where that information is stored. (You would otherwise have to go back to the central place and edit the source of the information in that one place which would throw your train of thought making a little change would take a lot effort)
- But secondly and perhaps most importantly most sheets don't have links to other sheets in the same workbook that means that you can copy out sheets to other workbooks and the information just transfers over to that other workbook. (Obviously editing the Description in one book doesn't change that information in the other workbook once it is exported out.) It really comes into it's own when you want to send a mini workbook to one of your customers say for example the Energy Light Saving calculation. You can export (copy and paste) the sheet into another workbook and then send that workbook to your customer. The new workbook contains all the details as per the original which would otherwise be generating linking errors.
- Thirdly it allows you to have multiple copies of the similar sheets so for example :- The Minor Works sheet in the same workbook (providing the first five characters of the sheet name are left unchanged)

PLEASE REMEMBER - This exporting of sheets is not to be confused with the PDF generation – which is treated as a form of printing.

11.5 – Copying and Exporting Sheets

Copying into the same spreadsheet (Duplicating) and Copying into another spreadsheet (Exporting) both are done from the same menu.





11.5 – Duplicating Sheets

It is possible to have multiple copies of different sheets in the same workbook. !!!

This functionality was introduced with, in particular, the Minor Works Sheet in mind. But you might also want to keep an original copy of the Quotation and then modify the spreadsheet to make big changes to the Quotation.

So you can copy the sheet and then paste it into the same workbook and the new sheet will be automatically named with a suffix at the end of the sheet name, so for example Quotation would become Quotation_1.

The software (macro) **monitors the first five characters of the sheet name** and will therefore associate all the functionality (ie Macros) to the sheet that matches up with the first five letters of the name.

So the Tick macro on the Minor Works Sheet would work providing the first five characters of the sheet name were still the same. If you were to generate a **MinorWorks_Power** circuit sheet and a **MinorWorks_Lighting** circuit, then the ticks macro would work for both sheets correctly.

The things that won't work are the macros that share information across the other sheets. So for example it wouldn't be a good idea to change the Customer Information or contact details (on any of the sheets) after you have created additional sheets. The macro will either fail to update those sheets with non-standard names – or worst throw up an error and terminate the macro.

Another consideration is the Certificate number – you shouldn't have the same certificate number for two separate certificates – so we suggest you manually add an extension to the certificate numbers – perhaps 'P' for Power and 'L' for lighting.

11.6 – The "Additional Sheet"

The Additional Sheet contains the following mini sheets

- 1 Light Saving Calculator on the basis of turning lights off during the middle night
- (would only need slight rejigging to change it's use) 2 - BTU (British Thermal Unit) - comparing a boiler's output with the load (or projected load)
- 3 Areas and Volumes Calculator
- 4 Status Report useful for reporting on the condition or progress of jobs
- 5 Distribution Board Layout can easily select between **NEW** colours and **OLD** colours

11.6 – Exporting Sheets : - ie... Light Saving Calculator

This first section on the Additional Sheet.

It is possible to export sheets to another workbook so that your customer can have a mini spreadsheet to have a look at **!!!**

This functionality was introduced with, in particular, the Light Saving Calculator in mind. But you might also want to export all sorts of sheets to other spreadsheets.

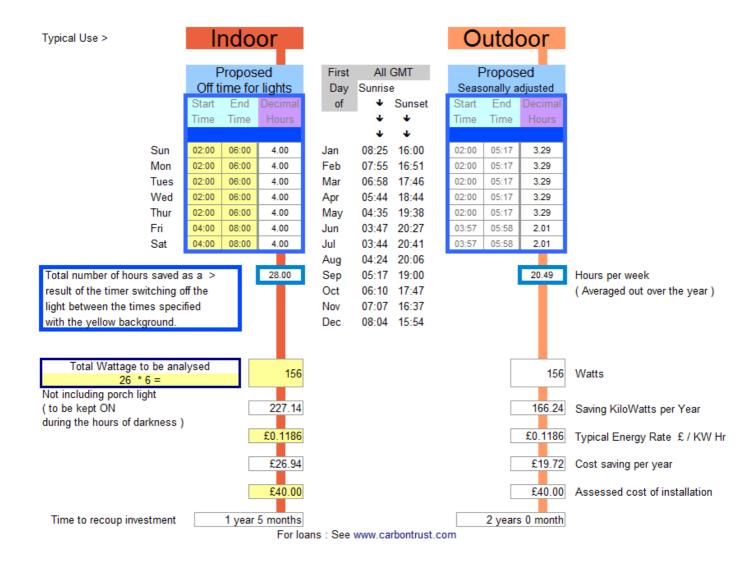
You can send the mini spreadsheet to your customer and then they will have the opportunity of tinkering with the values to see what the annual result will be. It is useful tool, for all sorts of occasions.

It is best to enter all the customer details and the description of the job into the spreadsheet before exporting the sheet(s), because the orphaned sheets will not update if contents of the parent workbook have been changed. A lot of work has gone into to permit the orphaning of spreadsheet without the linking nightmare that would otherwise ensue with lost links back to the original (parent) workbook.

For the **Light Saving calculator** – your customer could easily change the off time on a Saturday evening and see the extra economy on an annual basis. This particular spreadsheet has the daylight times built into the calculator so for outdoor lighting it takes into account that the outdoor lights wouldn't need to be on until 10pm in the summer, and that a timer coupled with a light sensor would provide the optimum benefit. This obviously doesn't apply to internal lighting – and the calculator also allows you to ignore the seasonal affects and just provides the savings on an annual basis for lighting controlled solely by time. (See graphic below)

So hopefully you can see the advantage of sending a mini spreadsheet over to your customer as well as the PDF that you have generated to show what you recommend as reasonable values. The Light Saving Calculator also includes a little pay-back calculator so that you can include a quotation for the work and a pay-back window in which the savings will 'pay for themselves'.

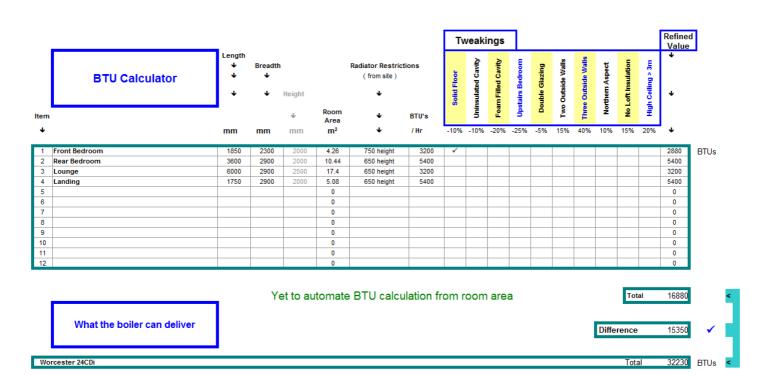
11.6 – Light Saving Calculator



11.6 – Exporting Sheets : - BTU Calculator

The Light Saving Calculator and the BTU Calculator are both mini sections of the Additions Sheet. There are other calculators planned for this sheet – as is better automation of the sheet – but for the time being you need to hide the rows that you don't need, so that the section you are using is directly below the header information and then you can generate a PDF or copy the sheet out to a second sheet as has been discussed previously.

It is hard to tell from the graphic below but the ticks in the tweakings section are for the adjustment of the BTU requirement on a per-room basis. They combine together, some are negative effects (no loft insulation over a bedroom) and some are positive effects – such as Double Glazing and all these effects are summed up in the righter-most cell on the row. The final row values are then added up and compared to the BTU output of the boiler.



Other mini-sheets contained within the Additions sheet are the Measurements Mini Sheet (for tiling, and carpeting) and the ly.

These are currently being worked on and will be developed as the need arises (they have been copied from older versions of the software and more columns have now been introduced since they were designed so they all look very squashed.

11.6 – Exporting Sheets : - Distribution board Layout

The fourth section on the Additional Sheet

If you want to use the OLD Colours and legend then just use the Pull-Down option

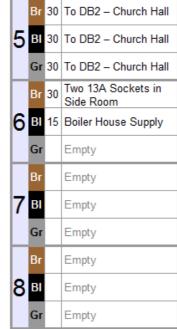
The following words, if included in the text, will cause the text to be shown in Grey

- Empty - Used (as in 'Not Used')

DB1

- Reserved.

10	_			-
	Br			
10	BI	1		
20	Gr			
10	Br			
10	BI	2		(
20	Gr			
10	Br			
	BI	3		1
	Gr			
	Br			
	BI	4		8
	Gr			
	20 10 10 20	20 Gr 10 Br 10 Bl 20 Gr 10 Br 6r 8r 8l	10 Br 10 Bl 2 20 Gr 10 Br Bl 3 Gr Br Bl 4	20 Gr 10 B1 10 B1 20 Gr 10 B1 20 Gr 10 B1 20 Gr 10 B1 30 Gr 31 Gr 31 B1 32 Gr



PullDown to Select
NEW COLOURS or OLD COLOURS
OLD COLOURS

The following words if included in the text will cause the text to be shown in GREY

- Empty
- -Used (as in Not Used)
- Reserved

Entrance & Main Classroom Lights	10	R	
Toilets & Side Room Lights	10	Y	1
Spot Lights (Church) & Socket 1 (musicians)	20	в	
Spot Lights (Church) & Socket 2	10	R	
Organ	10	Y	2
Organ	20	в	
Organ	10	R	
Empty		Y	3
Empty		в	
Empty		R	
Empty		Y	4
Empty		в	



12 – Hints & Common Issues

Guesstimate values

Guesstimate values are values which are estimated values that have been guessed at (with a degree of knowledge and confidence that they are reasonable)

When changing a consumer board it is almost impossible to verify every value of the outgoing circuits – and yet the regulatory bodies want values in all sections of the Schedule of Test Results.

We have found a neat way to represent these guesstimate values – and how you have arrived at these values.

AND you can still know which values are guesstimated and which are actually read – as you can see below – you can't initially tell.

		UIT DETAILS	TES	TRES	ULT	S							
	(Circuit Designation			Circuit Dedanc				Insula Resist			>	op
гC	ounti	ng from Isolator		Circuits ured end t		All Cir	cuits	Line Neutral / Earth	Line Ne utral	Line / Earth	Neutral / Earth	Polarity	Earth Loop Impedance Z _s
Position	Designation	Use the words 'Empty', 'Ring', 'Spare', 'not used'	r ₁ line	r _n neutral	r ₂ cpc O	R ₁ + R ₂	_		.⊐ <mark>₹</mark> MΩ		MΩ		<u>α</u> Ω
Ъ	Des	where appropriate	Ω 14	Ω 15		Ω	Ω 17	MΩ	IVIΩ	MΩ	1VIL2 18	19	20
	-	Origin (meter tails)											
1													
2		ISOLATOR											
3													
4		RCD A											
5	A1	Conservatory, Living Room, Hall, Landing, Bed2, Bed3 and 1 socket in Bed4 : Ring	0.73	0.76	1.28	0.53	-	199.9	199.9	199.9	199.9	~	1.00
6	A2	Cooker			/	0.07	-	199.9	199.9	199.9	199.9	1	0.65
7	A3	Utility, Kitchen and Dining Room Lights				1.20	-	199.9	199.9	199.9	199.9	1	1.58
8	A4	not used											
9	A5	Immersion Heater				0.24	-	199.9	199.9	199.9	199.9	1	0.82
10	A6	not used	X										
11	A7	not used			//								
12	A 8	Garage Light				1.20	-	199.9	199.9	199.9	199.9	1	.78

1(T22) and 2(AA22) are measured values and are entered as 0.07 and 0.65

Whereas other values such as 3 and 4 are entered as =0.24 and =0.82 and you can't tell the difference ...

Neat Hey !!! - Furthermore ...

For **4** (AA25) instead of entering =0.82 you could enter =T25+AA22-T22+0.01, which is the original guestimated value of the R1+R2 with the adjustment for Zs that you experienced for the Cooker circuit plus or minus a fudge factor so that an inspector wouldn't suspect.

And only you know all that hidden information.

Of course if you are a regulator reading this information – I will deny that I ever have used such underhand and deceitful methods.

12 – Common Issues (contd)

Macros will not operate unless the following things are in place ?

- Cell A1 on the Reference Sheet contains information pertaining the previous macro that did not complete. (Delete the contents of this cell and try again)
- Macro security level with the host environment (Calc) must be set to NORMAL. This is accessible from the Tools, Options, Security and then select the Macro Security button. You may have to restart Calc (or the entire Open Office suite) for you setting to take affect.
- Spreadsheet must be opened with 'Macros Enabled
- •' Sometimes people have managed to open the spreadsheet within a browser the macros obviously won't work when viewed from within a browser. SOLUTION > Is to download the file and then edit it locally.

If you have run out of ideas as to what might be the problem – then you call contact AllertonEPS-Software. Before doing please answer these questions, and have the following information available :-

- Are the macros enabled ? YES or NO
- Do you get the start up messages as per Section 2 of this User Guide. YES or NO

It is conceivable that you are experiencing a problem that hasn't yet been discovered and needs talking through with you - to that end we would need to contact you by telephone and you could do with having the following information available :

- What version of Open Office are you using ...
- What platform are you using
- Your telephone number and the best time to contact you

12 - Common Issues (contd)

Sometimes the 'Disseminate' Macro appears to stop working ...

SOLUTION :-

Type in the information, press the 'Enter' key, wait two seconds before selecting another cell (or sheet - with either the mouse or the cursor keys).

This is because the macro has to stop itself from calling itself and the best way is put a pause where the macro does not respond to information. For example if you are entering information into the Overview Page, then the macro should detect this and change information on the other sheets (such as the Quotation and Invoice sheets) - but if it didn't block the macro from triggering on those sheets then the data entering those sheets would also trigger the macro – and you end up in a race condition where the macro never stops triggering itself. So hence the pause – so if you were to enter the information too fast into the cells the macro won't detect the change to the cell and therefore won't Disseminate the information to the other sheets.

If you are wanting to change existing information in a cell then put a SPACE at the end of the contents of the cell – that way the contents has changed and the macro should trigger, but as far as viewing the contents of the cell – you can't tell that the cell's contents has changed.

This is triggering issue is a slight niggle with Open Office (and is consequently outside our control), we consider that is 'liveable with' and that all that is needed is 'restraint' when entering information and the software will work perfectly – providing the ENTER is used and then wait two seconds. This is the only area where Excel is superior to Open Office – this macro triggered better when the software was using the Excel platform, but in every other regard the Open Office platform is better than Excel.

Setting the Enter key not to move the selection.

To give the macros time to detect the cell changes you are making it is a good idea to change the default settings of Calc. Go Tools, Options, Calc, General Input Settings and de-select the 'Press Enter to move selection'

 OpenOffice.org User Data 	Metrics Updating
General Memory View Print Paths	Measurement unit Centimeter Update links when opening Iab stops 1.25cm Image: Additional stress of the stress of th
Colors Fonts Security Appearance Accessibility Java Online Update	Input settings Press Enter to move selection Press Enter to switch to edit mode
Improvement Program	 Expand <u>formatting</u> Expand <u>references when new columns/rows are inserted</u> Highlight selection in column/row headers Use printer metrics for text formatting Show overwrite <u>w</u>arning when pasting data

We are not certain whether this is necessary to permit the operation of the Disseminate macro, we are also not sure whether our settings have been carried over from previous installations of the Open Office software and that this may be the default option for this selection anyway. (Perhaps someone could advise us).

12 - Common Issues (contd)

Macros (without buttons) don't seem work :-

YOU MUST CHANGE THE CONTENTS OF THE CELL

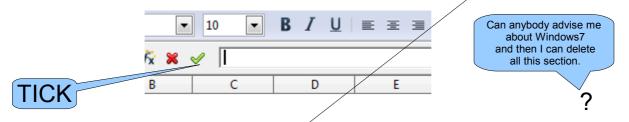
You must press ENTER after each entry that you want to be detected by the Disseminate Macro or the Tick Macro. If you accidentally just click away or use the arrows keys to move away from the cell in which you entered the information – you have go back to the cell then Press F2 to start editing the contents – you then have to add something to the contents of the cell, the simplest thing to add is a Space. (You can even add a space to a telephone number because telephone numbers are handled as strings.) Then you can Press ENTER afterwards.

[Like all these niggling operating platform niggles – the situation can only get better as new versions of the platform are released.]

with version 3.3.0

On Windows7 and MacOS the macros (without buttons) don't seem to work.

This is a fault with the implementation of the Open Office platform on these two Operating System platforms and whilst we are confident of a solution to this issue in future releases of the Open Office software, we can advise our customers of a work-around. Instead of pressing the ENTER key after each entry the TICK to the left of the Function Bar needs to be pressed instead. (Thanks to Paul (supra59uk@yahoo.co.uk) for finding the work around to this issue).-



On MacOS the situation seems a little bit more muddled – although Open Office is described as platform independent – when it came to finding out how to allow macros to run – the option from the menu bar to get to the set-up options for Open Office wasn't available.

It has come to our attention that some software called NEO Office has been written based on Open Office for the Mac environment – and there the TOOLS, OPTIONS are available to enable the selection of the Macro security level. And the ENTER Key issue is still an issue on this implementation of the platform. What is surprising is that someone has gone to the trouble of writing NEO for the MAC platform rather than just getting the Open Office guys to fix the issue with Open Office.

It is also surprising that a fault exists on Windows 7 and MAC, but does not exist on VISTA or XP.

Whilst getting familiar with the EQIC software – Make sure the MaterialsAndTasks Database is :-

Whilst getting familiar with the EQIC software make sure the MaterialsAndTasks database is stored in the same place (directory) as the customer files. Once you are more confident with the software you can select an alternative place to find the database by selecting it on the Overview sheet.

www.DropBox.com - we now store our MaterialsAndTasks Database in the public area of our DropBox – on the website – there is a link to the file – or (as would be preferable) you were to install DropBox on your computer any edits you made to your copy of the MaterialsAndTasks database would get transmitted to all other users of the database – so that everybody copy of the file stays in sync.

The Reference sheet – Cell A9 contains the Debug level.

When fault finding on your system you might want to change the Debug Level – so that more (or less) messages are revealed to you. The software is set to the optimum level of messaging that we think is suitable for your use of the software – but you may want to change this value to see more detail of the workings of the software. You must save the spreadsheet and re-open it to change the Debug level.

12 – Common Issues

Adding a row.

There is a special way to add a row that is the same as another.

Select the entire row you want to copy, right click the mouse and select 'Copy' Go to where you want to insert the row – right click your mouse again – but instead of choosing the standard Paste option, choose the 'Paste Special' option. This will then produce a little menu for you.

Paste Special		—
Selection Paste all	Operations	ок
√ Te <u>x</u> t	© <u>A</u> dd	Cancel
<u>N</u> umbers	© S <u>u</u> btract	Help
√ <u>D</u> ate & time	Multiply	
✓ Formulas	O Divide	
√ N <u>o</u> tes		
✓ For <u>m</u> ats		
√ O <u>bj</u> ects		
Options	Shift cells	
Skip empty cells	On't shift	
Transpose <u>T</u> ranspose	Down	
🔲 Link	© <u>R</u> ight	

The only thing that you need to change from the normal selections is the 'Shift Down' selection. (or if you are inserting a complete column then you would use the 'Shift Right' selection.)

[There are still some issues that Open Office need to resolve with regard to inserting - indexing other entries - but we have made sure that this software works around these limitations.]

12 – Common Issues (contd)

Deleting information.

Get into the habit of deleting stuff using the backspace key

It deletes more cleanly – although you need to be aware that it **deletes everything including any comment** that might be associated with the cell that you are deleting.



Once a cell's comment has been deleted – any macro trying to put information into that cell's comment will not succeed, the macros don't create comments they only substitute information within existing comments.

When merged cells won't allow you to paste something over something else !

This was an issue with Open Office 3.1 – Version 3.2 onwards has resolved this issue. Download a newer version of the Open Office software from www.OpenOffice.org

Tasks are specified in the Labour Section !

This deemed the most relevant place to specify tasks, particularly as Tasks and Labour are nearly the same thing and Materials just support you in your task / labour.

How do I force a Carriage Return within a section of text !!!

Do the following :- Alt Gr & Return or just Ctrl - Enter

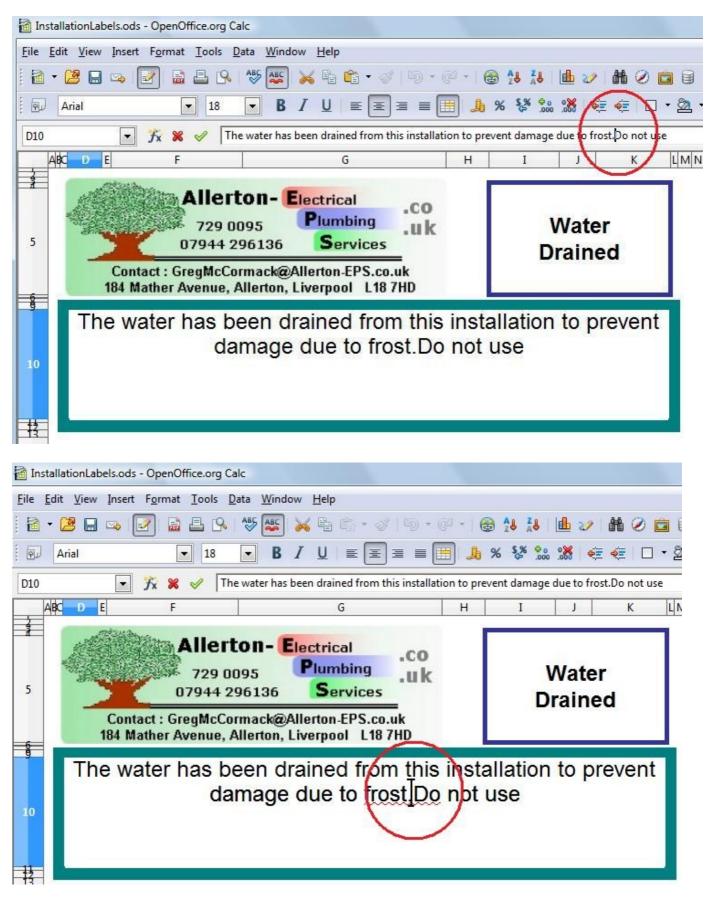
- (The cell must be edited rather than first time entry (press F2 to enter editing mode) AND the editing should be in cell rather than the formula bar at the top of the page -See next page for an example)
- (The "Alt Gr" key is generally to be found to the right of the Spacebar, it stands for "Alternate Graphic" and is used to access other language's characters on a standard QWERTY keyboard)
- ("Return" is Carriage Return OR "Enter" on Keyboard)



12 – Common Issues (contd)

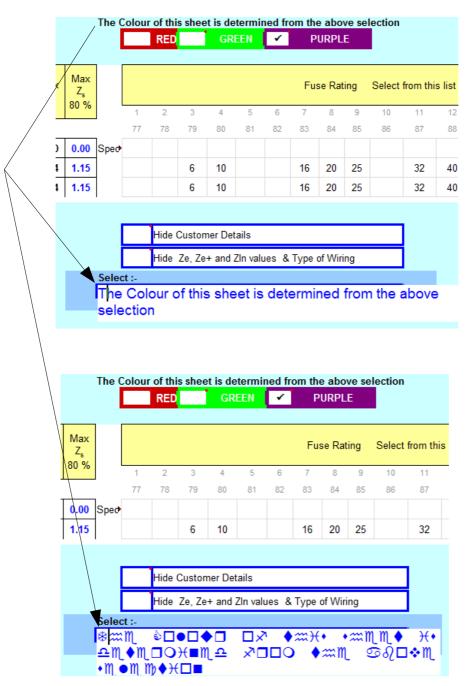
How do I force a Carriage Return within a section of text CONTINUED !!!

You must type the 'ALT GR' - RETURN or CTRL – ENTER when editing within the cell – The first picture below shows editing or entering the information on the formula bar, the second shows editing or entering information with in the cell. You need to use the 'ALT GR' – RETURN or CTRL - ENTER when editing as per the second picture ...



When typing a 'T' for a TICK - you sometimes get nonsense !

- When typing 'T' to get a Tick into a cell, sometimes the spreadsheet guesses that you want to change the contents of the cell to be the same another cell further up the spreadsheet. So for example if there is some text in a cell higher up on the spreadsheet, as the graphic below illustrates, this can get suggested to the user as a possible choice. It can look confusing but the software is only looking for the first character and will just see the 'T' of the cell contents and then change it to a '<'.
- It is even more confusing when the font of the cell is set to Wingdings as per the second graphic, but the same solution applies just ignore the suggestion and just type 'T' and enter, or 'X' for '*'.
- We don't expect that this will be resolved in future releases of the Open Office software, so it is just case of not getting confused and fore-armed with the knowledge is fore-warned.



12 – SMR Trials

SMR Trials have had some macros removed (and have the suffix smr) This is because we are unable to secure the software on OpenOffice's Calc.

smr version of the software has only the following macros available :-

- Macro The copying of the Customer's Address to the Work's Address field.
- Macro that changes wording 'Ohm' to the ' Ω ' (Ohms) character.

(The code that you are provided with at the time of your purchase is to be typed into the Renewal Code Reminder field. We (might) also send you an email and advise you of the need to renew your software on the anniversary of the purchase of the software. The software will continue to operate after the 12month window but the if you want to continue to get updates for the software and get discounted rates on other software then you must renew the software with us (we make a small administration charge for this renewal) - otherwise our commitment to supporting you will lapse – and you will have to support yourself with the use of the software.

13 – List of items that you need to address to tailor your template to your business

This is a more expansive list of the items that you need to address when tailoring the Template to suit your business.

The majority of them have already been covered in the initial section – but it wasn't appropriate in that section to list all the aspects that need tailoring.

- Type your business details into the Overview Sheet

- Type in your renewal code into the Overview Sheet

- If you are an Approved Contractor / Domestic Installer then you will want to put the correct logo (according to your approval body) onto your Electrical Certificate and your Minor Works Certificate. We have logos on the Reference Sheet for the main approval bodies. NOTE that sometimes there is a small logo needed next to the the business information on the Electrical Certificate and the Minor Works Certificate.

- If you have a business logo that you can use, then paste that into the appropriate positions on the :-

Quotation sheet Invoice sheet FreeFormat sheet CompSlip sheet StatusReport sheet Additional Sheet (BTU Calculator, Light Saving Calculator, Area and Volume

Calculator

(Pasting at the top of the sheet over the text is quite acceptable)

(Use the manual pasting method rather than the automated one (accessible from the Overview sheet) which can't accurately position the logo over the text)

- If you have other logos that you wish to use on the Quotation and Invoice Sheets then paste them onto the appropriate positions.

- If you can think of any other generic information that you might want to put on your customer facing sheets :- such as on the Invoices, we have the comment – 'Please make cheques payable to Greg McCormack, Thank you'

FINALLY – Save the file as your Template file.

Are you able to change your logo at top of page to represent my own name ?

You can put your own logo at the top of the page - it would help if it were of similar dimensions to the logo that we use.

How many sheets would generally print out for a quotation ?

A simple quotation would be on one page. Even complex quotations seem to only need 1¹/₂ pages.

Are there details regarding labour times for each job ie... wall chasing, fixing capping, wiring Junction boxes. Can this be hidden to the customer but available to you. ?

- We have found it more appropriate to estimate the time taken for each electrical point (whether that be a socket or a light switch) and then multiply out the appropriate number of times - so when we specify three hours for a socket - it takes into account capping, JB's etc... (you can tailor your estimating to any level of detail that you think appropriate).

- anything can be hidden - but obviously **not everything** - otherwise there would be nothing to which to attribute the time taken for the job. If everything was hidden then the customer would see no job items - but 3 hours of labour - so that is obviously not permitted.

Is this software only for domestic use ?

No - It is geared to the Domestic Installer - but has been used on Churches and other premises - you can change the colours to suit your requirements and the wording of the name of the form - from 'Domestic Installation Certificate' to 'Electrical Installation Certificate' so NO - there should be no reason why it is restricted to Domestic installers – In the early pages of this guide there is colouring of the Schedule of Test Results sheet for a three phase installation.

The 'Terms and Conditions' and the 'Consumables' links both point to AllertonEPS's website ?

They point to our website – but for the Consumables at least we have tired to remove any reference to AllertonEPS from the list of consumables. But if we weren't to point them somewhere they wouldn't work – so it is better to point them to something functional than allowing your customers to see a broken link (until you have set up your own website). AllertonEPS can help further in this regard and can even host the website for you although it would be necessary to make additional charges. Please email us for guidance / prices if you need assistance in this area.

So everything is included with all macros enabled - is it a fully working version ?

You are right - a bargain at double the price.

Some text missing on a Quotation or an Invoice ?

You have probably hit a limit of the number of characters in an individual cell, the solution is to use SuperGroups to break up the complex group – this is done by adding extra characters to some of the items of the group so that they are not all trying to get put into the same location on the Quotation or Invoice.

What about the future ?

That depends on what feedback we get from our customers – future development of the software is very subject to the financial return of the product in it's present form.

Copyright

AllertonEPS can prove that we are the authors of the software and all the little features of the software that are so beneficial. Any attempt to sell the software or to incorporate these ideas into other software will be explored and copyright law will be brought to bear on anybody / organisation trying to pass this software (or part of it) as their own.

15 – External Extras

This is the snapshot of the website that accompanies the software ...

)own	load	
	mplate - available from the link in the email you received OR on the CD	
	sAndTasksDatabase	<u>.ods</u> .zip .
Standard	TermsAndConditions - for you to your customers	.ods .zip .j
YYYYm	mNN_DrawingTemplate_Rev303	.ods .zip .t
Consuma	ables	.ods .zip .j
Installatio	on Labels	.ods .zip .
LightSav	ingCalculator	<u>.ods</u> .zip .
User Oue	estionnaire (Editable in any word package)	RTF

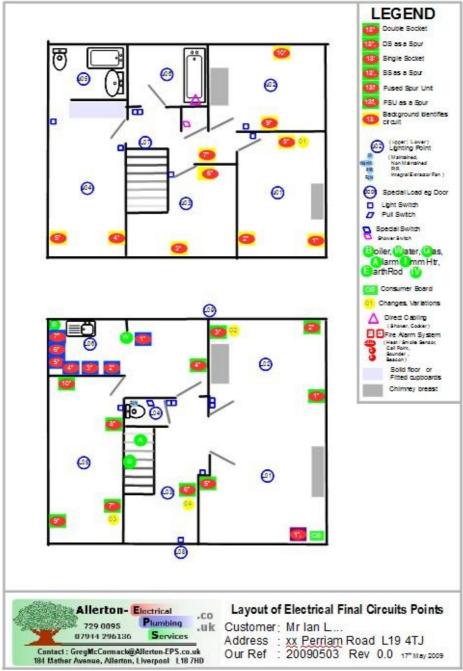
From here you can download the ancillary software, forms and extra information that we have found very useful as a Domestic Installer business, particularly the Drawing Template.

15 – Drawing Template

Electrical Schematic of the Location Final Circuit points !!!

When you purchase the software you receive our drawing template, which allows you to generate your own electrical schematics – the huge benefit of these schematics is that they show the location of the 'point' and not only that it exists somewhere in the house (as per the BS7671 schematics).

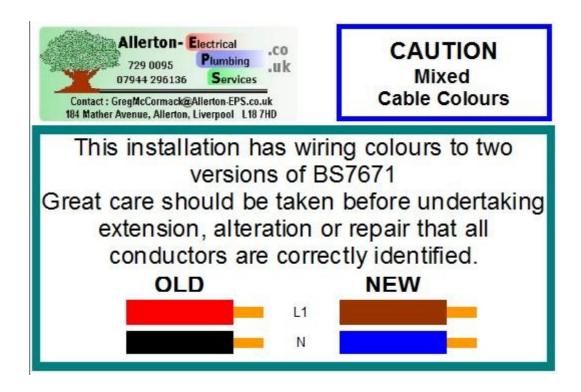
This drawing when generated at the time of the Quotation makes you look very professional and although there is some additional time spent early on in the life cycle of the project – they can be tinkered with and republished by you so that you can present them as part of the final documentation of the installation. They can also record the changes and variations – which reduces the chances of mis-understanding between you and your customer.



The second page of the template is where symbols are stored, before you give the file to your customer you can copy, use and then delete them. There are toilets, baths, wash-basins and sinks. There are also stairs with curling tops, going up and going down, only on three and more storeys do you need an arrow to tell you which way the stairs go (up or down) because the shading tell you that the stairs are leaving the floor that you looking at. Every symbol has it's counter-apart turned through 90°, so you are not fiddling around trying to rotate symbols through a precise angle.

The template is stored in the Public folder of www.DropBox.com - for more details about DropBox see the MandT section of this User Guide and DropBox's own website. Click for a snapshot of Version307

When you purchase the software – you get a lot of other stuff with it – including electrical installation labels !!!



You also get the source file for the consumables – when you receive the template file it is pointing to our AllertonEPS website and to the 'Consumables.htm' specifically !!!

So we provide the source file so that you can tinker with it to create your own tailored version, and publish it to your website and then point your template file to your version of the consumables.

Examples of Consumables

Electrical Work

Labelling Machine tape Earthing sleeving Brown and Blue sleeving Choc Boxes Choccy Blocks Ceramic Terminal Blocks Cable Clips Crimps (various sizes) Insulation Tape (every colour)

Cable (where not specified specifically) Warning Labels with Business logo on them

Contributions to Overheads

Public Liability Insurance £2 million Insurance for Tools and Vehicle Laminator pouches (for certificates etc...) Computer, Printer (Paper & ink)

Plumbing

Gas Solder (Lead & Lead Free) Solder Flux (Lead & Lead Free) PTFE tape Plumbers Mait Lead Washers Hemp White Boss Paste Pipe Clips Olives 15mm , 22mm and other sizes Rubber Seals 1.25" & 1.75"

General

Washers Raw Plugs Screws No Nails Glue

On bigger jobs these items

might be clumped in as consumables Joints, unions, bends, isolating valves etc ...

15 – External Extras (contd)

When you purchase the software – you also get the source file for the 'Terms And Conditions' !!!

You can edit the file and publish it onto your website so that instead of the Template file linking to AllertonEPS's Terms and Conditions, it can point to your version on your site.

Allerton-EPS

Type of Job : E - Electrical, P - Plumbing ▼

These **Terms and Conditions** are to protect both parties from misunderstandings that might otherwise arise in our relationship. Whilst these conditions are thorough; they are not exhaustive, there might also be Specific Conditions stated on correspondence to you.

Cond	nuon	13 310	aled on correspondence to you.
Any	1	a	Whilst every attempt will be made to retain fixtures and fittings around items that are to be fitted / replaced we can offer no guarantee pertaining to damage and sometimes alignment of existing fixtures and fittings.
		b	Where it is necessary to gain access to concealed pipework and cables, we endeavour to achieve this with the minimum of disruption to the décor, but it is must be borne in mind that subsequent re-decoration may be unavoidable.
		b	Carpets and laminate floors that are lifted in the process of our work cannot be guaranteed to be replaced perfectly. The customer may have to call on the services of Professional carpet fitters for the relaying of carpets, the same applies to laminate flooring.
		с	Whilst working in a property there is always the possibility of disturbing other services other than the one being worked upon, this includes Gas and other water carrying pipes other than those being worked upon as well as other electrical equipment and wires. We endeavour to repair electrical equipment and cabling and water pipes, but reserve the right to make a charge for this remedial work. But with regard to damage to the Gas installation - the onus is on customer to sort out the problem and effect repairs. We cannot be held liable fo any costs borne in relation to this work.
		d	 Where there is a necessity to remove tiles / wallpaper, the substrate can sometimes be inadequate (to support re-tiling etc and needs to be replaced). Typical examples of this :- - are where plasterboard has been used as a backing medium and is inadequate in it's strength compared to the strength of adhesive used to mount the tiles. - are where damp has penetrated behind the tiles and caused weakness. Costs associated with the extra work of rectifying the substrate are outside the quotation and also extend the length of the job.

When you purchase the software – you get a copy of our MaterialsAndTasks Database to act as a starting point for your version !!!

You can edit this file to tailor the Materials and the Tasks to suit your business, you can adjust the pricing – some of ours might be a little out of date, some items you might consider need significantly higher MarkUp values than we have specified. The database(s) are in the form of a spreadsheet that you can edit and any changes you do make are highlighted by the little yellow border on the left hand side of the row. This remains yellow until the next use of the 'UpRev' macro button. - more details are to be found in the section of this manual devoted to the use of the MaterialsAndTasks Database.

Database Version :	Rev 14 - Oct 2009 - 1st 00 version	Up Rev Column Colour		original				Busine	ss is	Not VAT R	egistered	VAT Rate
		Start Macros		See below	v for more de	tails of	codes					15.0%
Primary key	Use these 'greyed out' columns as you wish	Description 3			Stock	k	-	Qty Required	Qty	(2). (2).	Unit Price	incVAT
(see below for rules on how to specify)	◆ Description 1 ◆ (as seen by customer)	(not seen by customer) (internal use only)	Source Co	duct Receipt ode Ref	De Order	Actual	Link	More than one	per Unit	Qty of Units Unit	Price Checked Date	excVAT
WashbasinOvalAtlas	Oval wash basin - Altas Vanity Basin from F	Fro⊁inset into worktop	York & Young		0	0	York&Young	1	1	1 Unit	y £75.00	incVAT
WashbasinTap	Washbasin Taps		Toolstatior 4715	5	0	0		1	1	1 1 Unit	£42.58	incVAT
WashbasinTapsMonoblock	Washbasin Mono Block Tap		Toolstatior 7460		0	0		1	1	1 Unit	£35.41	incVAT
VashbasinTapInserts	Washbasin Tap Inserts	similar tops to the Bath ones	YorkYoung		1	1		1	1	1 Unit	J. £12.00	incVAT
VashbasinPlugWaste&Overflow	Washbasin plug , waste & overflow				0	0		1	1	1 Unit	£-	incVAT
Vaste an32mm	Waste Trap - 32mm	McApine Bottle	York & Young		1	1		1	1	1 Unit	y £4.00	incVAT
VasteStraig	Waste Straight Coupler - 32mm	Black , Grey , White	Wickes 431-	921	4	4		1	1	1 Unit	£-	incVAT
Waste135Bend32	32mm 135 Deg Bend	Black , Grey , White	Wickes		4	4		1	1	1 Unit	£-	incVAT
WasteElbow32mm	Waste Elbow(s) - 32mm	Black, Grey, White	Wickes 431-	922	4	4		1	1	1 Unit	¥ £0.58	incVAT

This row has been changed since the last time the UpRev macro was run.

Type of Entr	V is	Primary key Description	GROUP	Engineer	Time in Hrs	Non Prin valu		Optional Multiplier
or End	y Specified		Colour	/ Qty		Price	Unit	0 2
T 1400 5			V					
		of Single Radiator with a Double Radiator	_ChangeRad					
LabourElem	51.1.5. I.	Quotation and Setting Up Time.	ChangeRad		1			
LabourElem	ent	Part draining the central heating system.	ChangeRad		1			
LabourElem	ent	Mounting the plywood onto the Plasterboard with glue and nails.	ChangeRad					
LabourElem	ent	Positioning the brackets onto the plywood.	ChangeRad					
LabourElem	ent	Putting all the attachments on the radiator	ChangeRad					
LabourElem	ent	Drilling new holes in the floorboard.	ChangeRad					
LabourElem	ent	Remaking the pipes leading up to the radiator	ChangeRad					
LabourElem	ent	Radiator connections	ChangeRad					
LabourElem	ent	Tidy up and create invoice	ChangeRad					
Material	1	WashbasinSecuringBolts	ChangeRad	1				
Material	1	TapFlexi15mm	ChangeRad	2				
Material	1	WasteTrap32mm	ChangeRad	1				
Material	1	ScrewdriverIsolatorValve15mm	ChangeRad	2				
			ChangeRad			£8	Sheet	

16 – Inside the Software

Behind the scenes is a huge amount code that keeps everything running smoothly – this is accessed as shown below ...

YYYYmmNN_EQIC_Template_Re	v823.ods - OpenOffice.org Calc
<u>F</u> ile <u>E</u> dit <u>V</u> iew <u>I</u> nsert F <u>o</u> rmat	<u>Iools</u> Data Window Help
i 🗟 • 😫 🖬 👒 📝 🔒	^§ _ Spelling F7 👔 ▾ 🛷 ☜) ▾ (<) ▾ ⊕ 🐉 🕻 山 💓 🛍
Arial	Language Detective , ≡ ≡ ≡ ≡ 🦺 % 🐉 號 🧩 ∉ 🥶
CH44 💌 🏂 🗵	
	Solver Scenarios
3 A 4 Domestic 5 DOMESTIC 6 DOMESTIC 7 Issued in action	Share Document Merge Document Protect Document , USTALLATION PERIODIC INSPEC
10 A DETAILS OF THE CLIEN	Cell Contents B ADDRESS AND DETAILS OF THE INSTALLATION
Client / Customer Name Address C Address	III Media Player Date of prev
16 17 18	Macros Record Macro Records
19	Extension Manager Run Macro installation
23 C PURPOSE OF THE REPO	XML Filter Settings Organize Macros OpenOffice.org Basic AutoCorrect Options Digital Signature Python
26 for which 27 this report 28 is required	<u>C</u> ustomize <u>Options</u> <u>Options</u> <u>Incerverguest</u> <u>Discretory or poxes in in</u> <u>JavaScript</u> <u>JavaScript</u> <u>JavaScript</u>
30	this report the time – Thus the Power and testing

If we were to ask you to change a specific macro – we would send you a text file – and you could Cut and Paste this into the correct place. Choose your template file, and go to the macro in which you are interested.

We would send you a copy of a whole section – so you would be replacing both the 'Invoice_Sheet_Activate' and the 'Invoi_chartDataChanged' with the section that we would give you as a replacement.

Procedure :

- Open up the file that you have received from us using a text editor, Press CTRL-A to select All, and then CTRL-C to Copy.

- Go into the macro editing section and then type CRTL-A to select All (again) and then CTRL-V to Paste from your clipboard.

- Then save as your template file.

17 - Postscript

EQIC - Estimation, Quotation, Invoice, Certification software is owned and maintained by

www.AllertonEPS-Software.co.uk

It has been made available to other businesses for their use. Businesses so entitled, will receive revisions and enhancements when they are available, providing Allerton-EPS has a current email address available.

We cannot be held liable for any loss how-so-ever caused – our software is provided in good faith and the responsibility for the accuracy of the Quotations, Invoices and Electrical Certificates generated by this software lies wholly with the user of the software. Please make any errors, omissions and changes known to us as soon as possible and we will endeavour to rectify the issues raised.

The authors (without obligation) will be willing to incorporate any changes / additions that you feel will enhance the product.

Please ensure that we always have your most up-to-date contact information (Email Address)

Privacy Policy

AllertonEPS-Software is totally committed to the privacy of our customers and users. We take this commitment very seriously.

Personal Information

We do not give, sell or otherwise share any of your personal information with any third party unless we have your specific approval or unless we believe that the law requires us to do so. This personal information includes any data we collect in order to process an order for purchase of one of our products as well as non-purchase related data collected from our users such as email newsletters, surveys, or downloads of free software.

Advertising and Marketing

AllertonEPS-Software delivers promotional messages on behalf of third party advertisers targeted on the basis of collected user data, such as through banner ads and email newsletters. We believe these product and services offers will be of interest to our users, and in all cases your personal information is not provided to these parties.

We also communicate with our users through email product updates, promotions, and newsletters. In all cases, collection of your email address will occur with your full knowledge and consent. You also have the ability to opt-out of such communications at any time.

Cookies

AllertonEPS-Software does not use cookies

Please contact us if you have any questions regarding this policy.

www.AllertonEPS-Software.co.uk

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