

EASYBOARD

First Steps

Status: up to and including version 2.1.9.x

easyBoard – First steps and creation of a first planogram

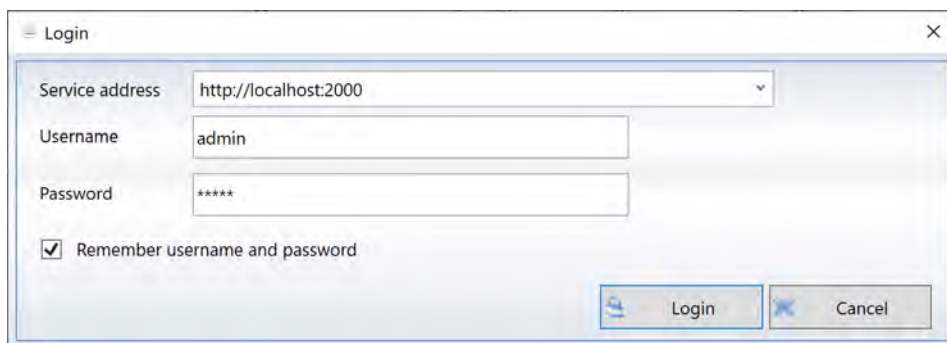
Start and Login

On your screen you should see a small icon named easyBoard.



Double-click on this icon and easyBoard starts.

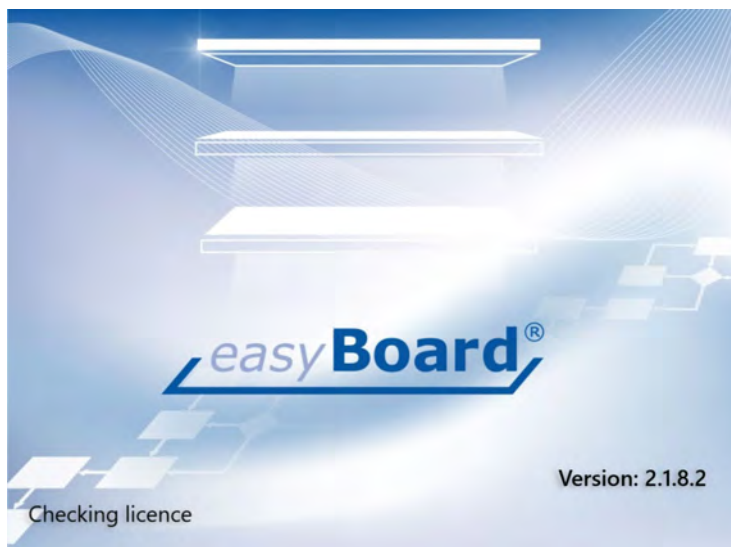
You will then see the login dialog.

A standard Windows-style dialog box titled "Login". It contains a "Service address" dropdown menu with "http://localhost:2000" selected. Below it are text input fields for "Username" (containing "admin") and "Password" (containing "*****"). A checkbox labeled "Remember username and password" is checked. At the bottom right, there are two buttons: "Login" and "Cancel".

Here the connection to the internal service and to the database is already preset (line service address). For user name and password, you will be given predefined entries or they will already be predefined. The check mark at Remember user name and password ensures that you do not have to make these entries again the next time you start the program.

Then click on the Login button and easyBoard will start.

You will briefly see the start screen.....



....and shortly afterwards you are already in easyBoard.

Main window with individual work areas

After easyBoard has started, you are in the main window of easyBoard. This is divided into six main areas, which are described in the following screen.

Menu bar:

It contains the individual work areas with the respective functions and shows the corresponding buttons (toolbar for DeepL access) of the functions.

Search window:

This is where you search for products or product carriers / shelf parts in order to always have the right one available from your article master in a matter of seconds.

Libraries:

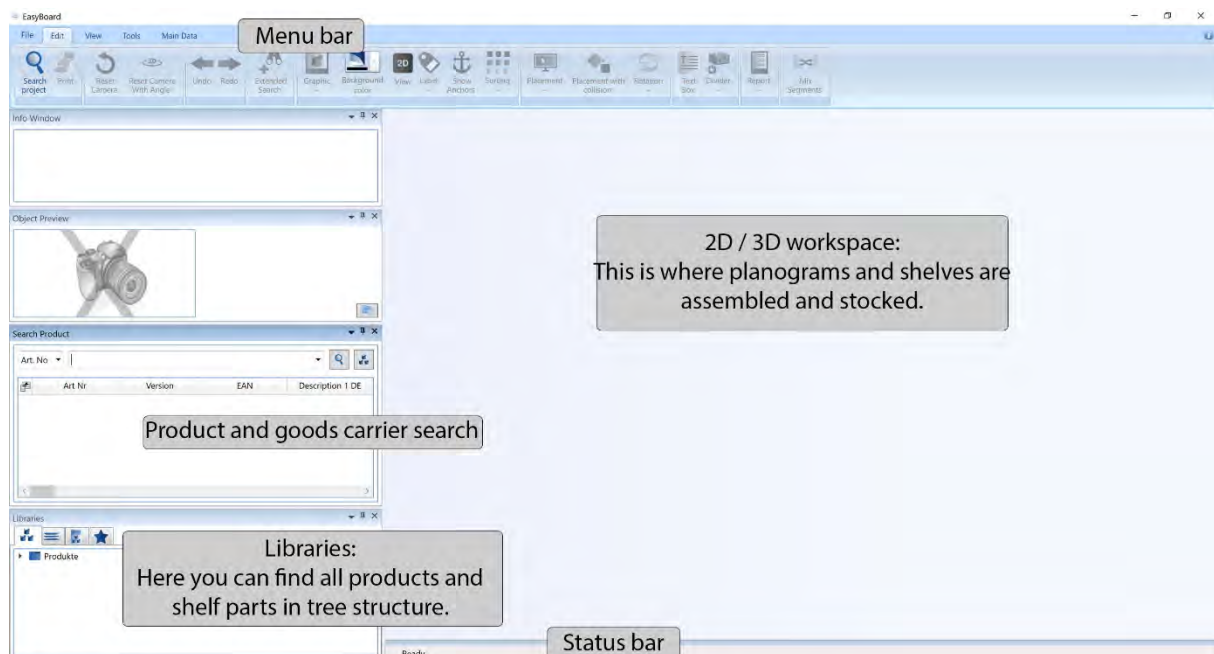
All products and product carriers are clearly sorted into so-called libraries. You determine the content and the sorting. Libraries can be e.g. also commodity group designations.

Status bar:

A small info area that always shows the current status of a selected object. For example, if you click on a placed product, the article number and description will be displayed here. The same applies if you click on a shelf in the rack with the mouse, for example.

2D / 3D workspace:

This is where your planogram will be created later and will show products, shelves, pallets in progress both in 2D and always in 3D.

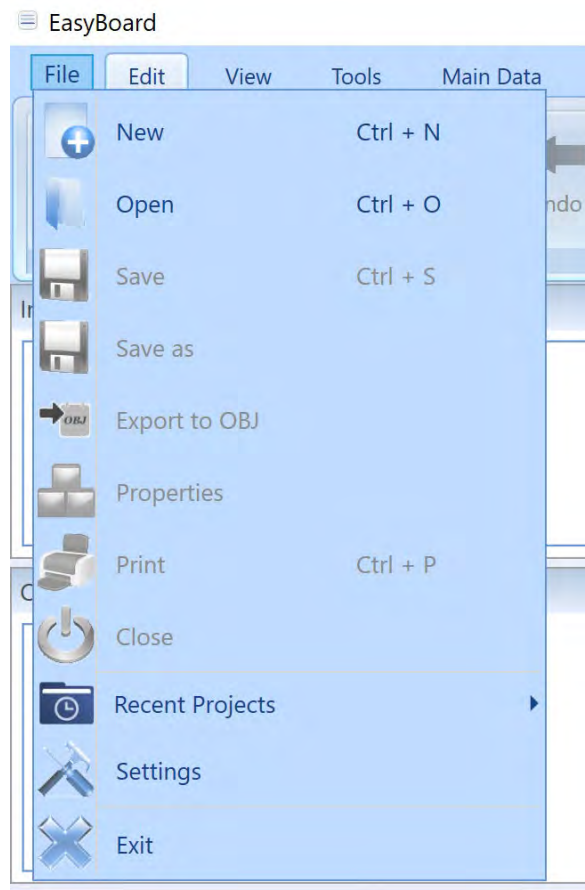


Your first project

New project

So that you can work efficiently and without frustration right from the start when working with easyBoard, we will go through a sample project with you below.

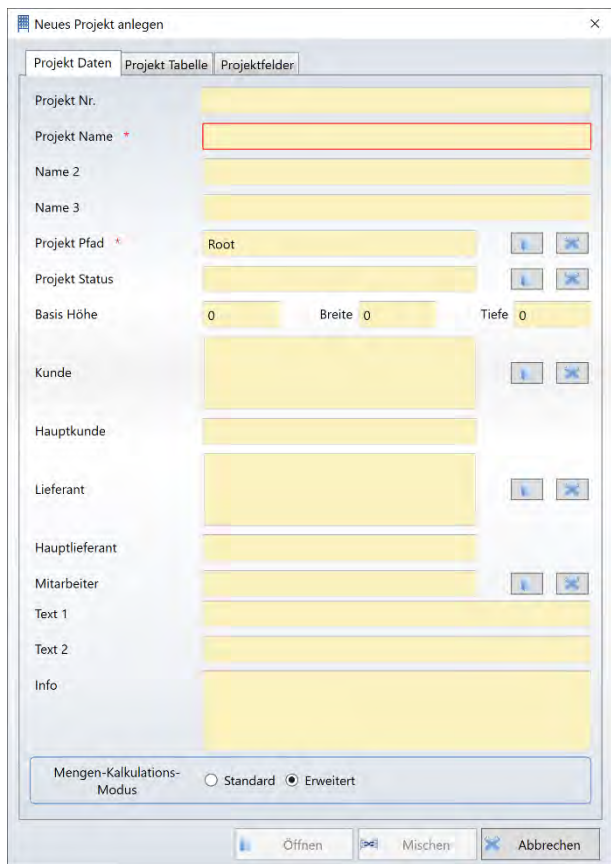
Please click on the Project tab in the menu bar at the top left.



A menu opens.

Click here on the entry New, which stands for the creation of a new project / planogram in easyBoard.

After clicking on 'New', a small dialog box appears in which you can enter the information required for the new project. Attention: You must enter something in all fields that have a small red star next to the name. All fields without this red star do not require any input.



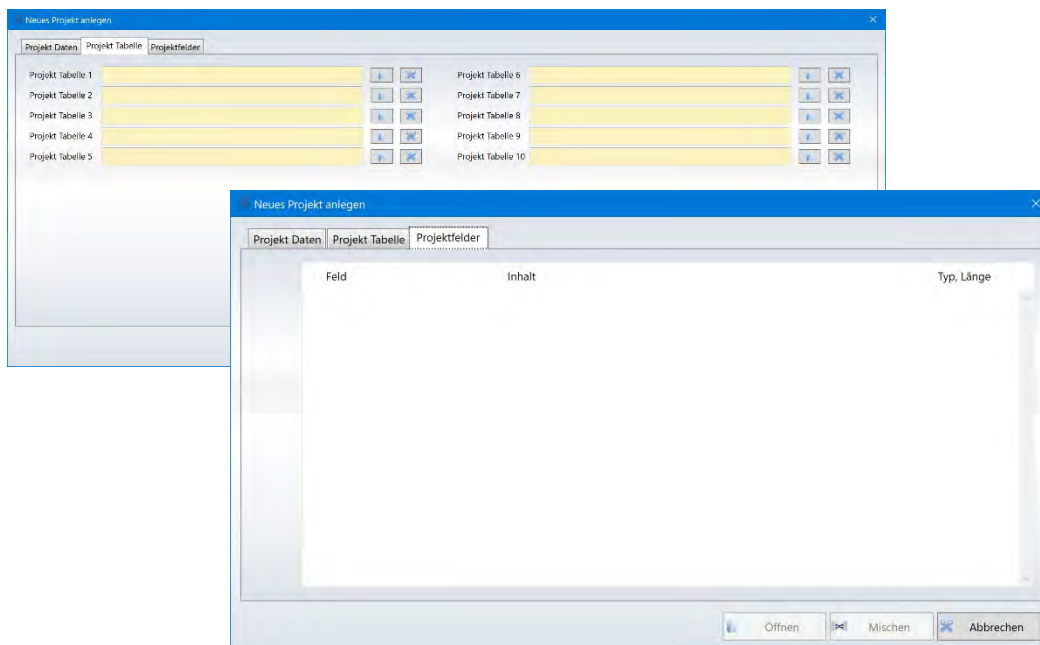
In your case we only need the input of any project name.

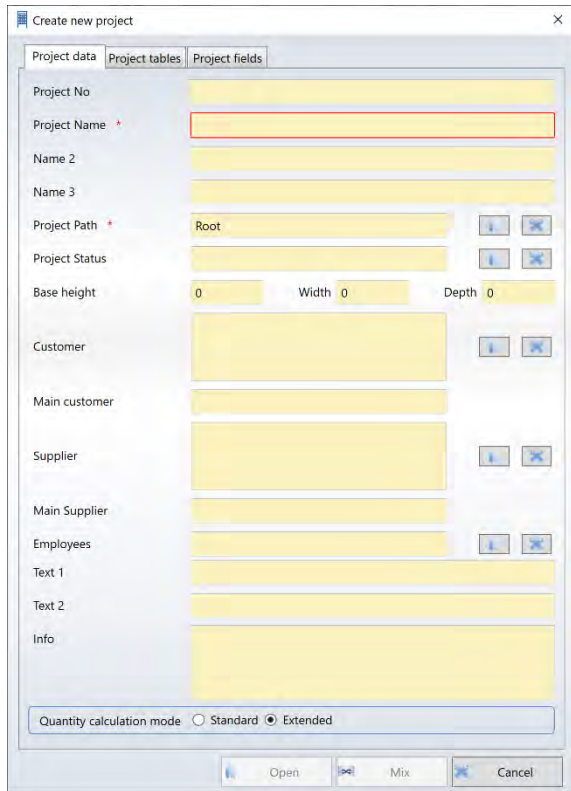
Please avoid the use of special characters like commas or slashes from the beginning. If you want to output the project as a PDF or in another format at a later time and save it on your computer or server drive, Windows will acknowledge this with a refusal and error message if you use such special characters. Slashes (/) are used by Windows to separate a folder from a subfolder and not to specify a file name.

In addition to the project data, the new project creation window has two more tabs at the top.

Behind this are options for selecting and entering further individual data for your project. For example, you can use an additional module (please ask your easyBoard representative or easyBoard support) to predefine your own tables and assign their contents to the project in

the simplest way. Individual fields can also be created and your data can then be entered into them when they are created or at a later date.





Back to our first project window:

If you have entered the project name, you can still specify from here where, in which folder, a project is filed and saved.

If the system is still virgin, the Root folder will be available as the storage location for the time being.

Go to the Project tab in the menu bar, then click on the Open button.

Now the Project Manager window opens.

There you have the possibility to create subfolders.

After the project name and the storage location have been determined, you can finally start: Click on the Open button and the current window closes.

Now your first project is created and waiting to be filled with life, respectively products and shelf parts.

If you take a look to the left and look at the libraries, you may notice that the view has changed. Instead of the usual products being displayed there, you will now see the possible product carriers / shelf parts.

easyBoard knows that this is a completely new project and nothing has been placed or planned yet.

Your next task is to assemble the shelf to be planned in its basic form.

The small tabs above the library entries always show you where you are:

The symbol for products:

You will find it equally at other places in the program when it comes to product data:



The symbol for goods carriers and shelf parts:

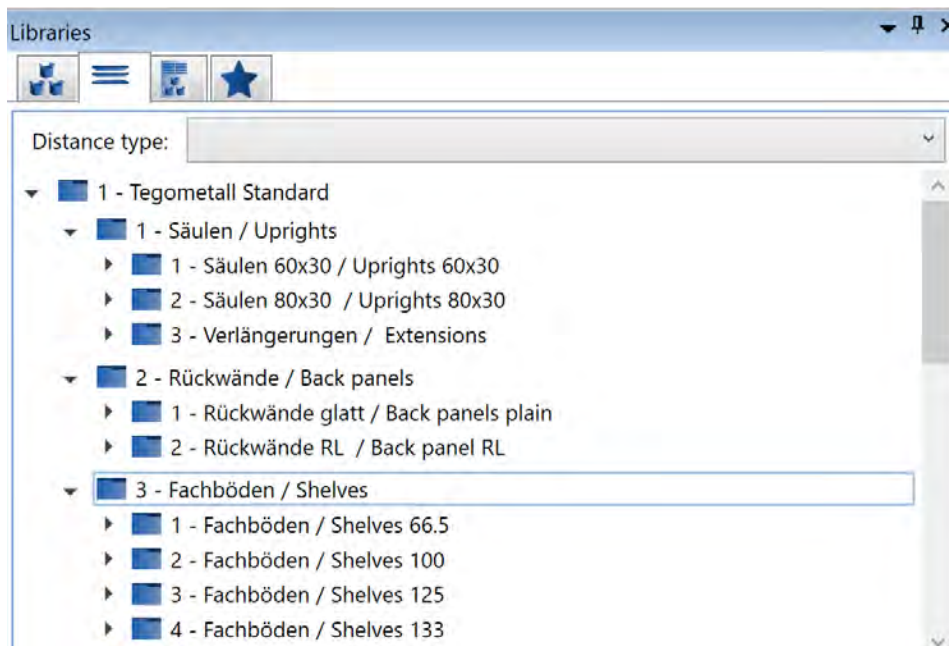


Now go back to the libraries for merchandise supports.

easyBoard works in principle as if you were assembling a shelf in your sample room.

I.e. first the columns for the first unit, then the back panels, then the shelves, etc.

Let's assume in our example that we want to create a Tego shelf with 2 units 125 width and 200cm height.



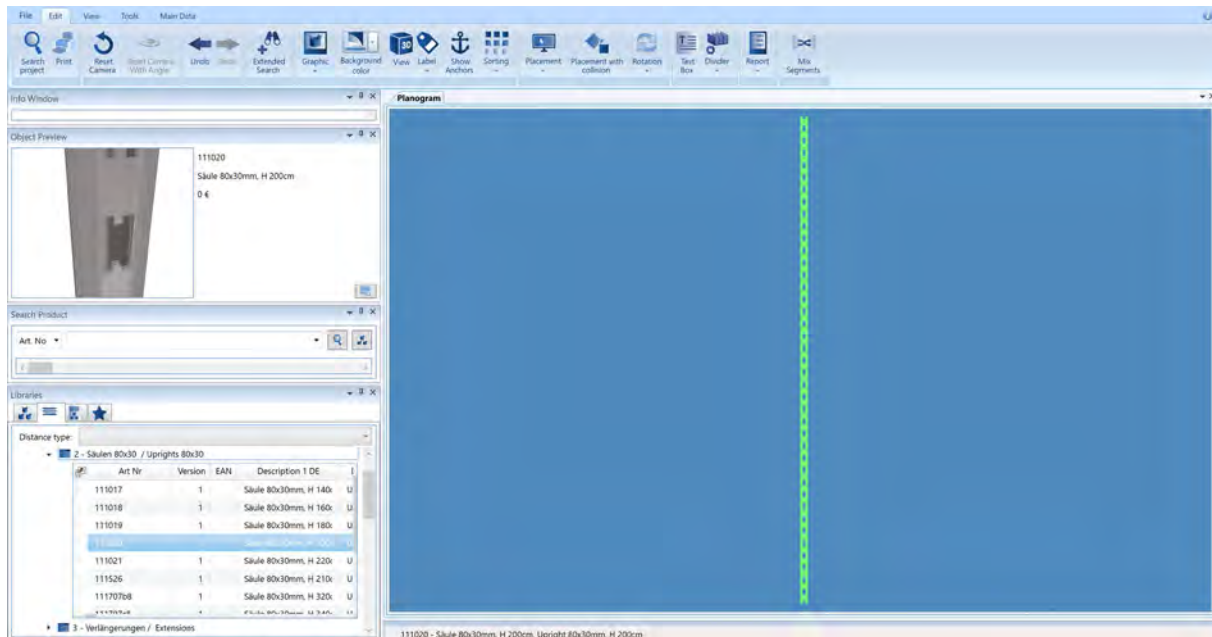
If you now click on the 1- Tegometall Standard entry in the container library, this library will open and you will see further entries, which in turn can be opened or closed by double-clicking and thus display the contents.

- In the entry 'Columns' you will find the stands or columns in the available sizes.
- In the entry 'Back panels' you will find the available types of back panels (perforated and smooth)
- In the entry 'Shelves' you will find all available widths and depths of shelves.

So we have everything we need for a standard shelf with dimensions 2x125cmx200cm.

Double click to open the library Columns/Uprights 80x30. Then double click on the second entry from the top, which contains the columns in a height of 200cm.

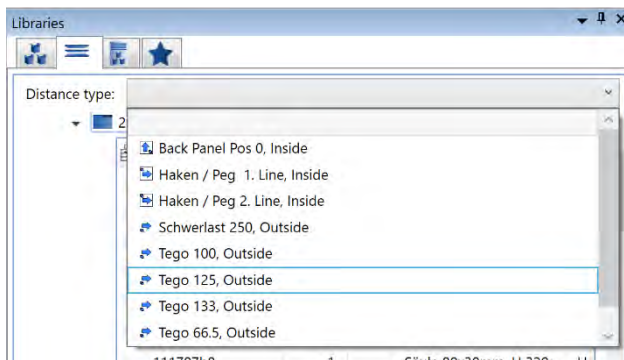
After double-clicking, you will see the column placed in the center of your screen.



Next it's the turn of column no. 2, which has to be placed exactly at a distance of 125cm.

Place columns

So that you do not have to do this awkwardly by pushing and pulling with the mouse, easyBoard offers a clever assistant, the so-called distance manager.



The spacing manager is visible at the top of the libraries. If you click there on the now still empty entry, various distance types will appear that we have already integrated for you (by the way, you can add as many of your own as you like).

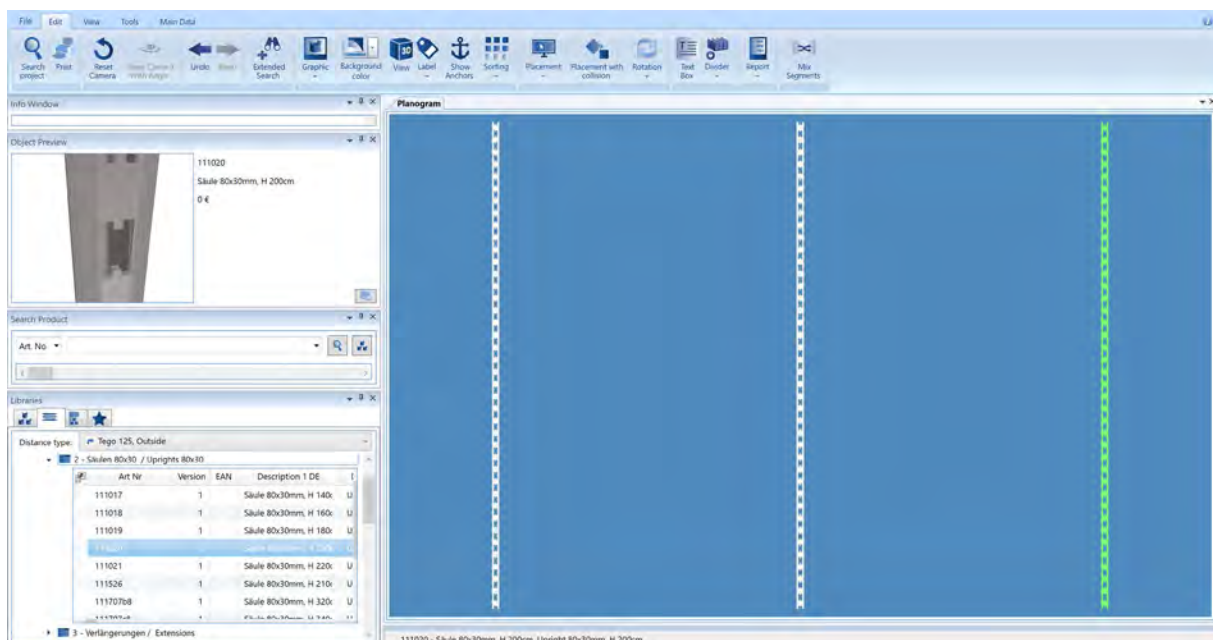
Please click on the entry Tego 125 in the list. Since the first column you placed is still selected, i.e. displayed in green, easyBoard automatically knows where the next and next

but one column belongs. You can therefore double-click as often as you like until you have placed all the columns for your shelf. The last column placed is always automatically selected.

In the current case, we want to create a shelf consisting of two units, it means that you also have to double-click three times on the columns entry to create a 2-segment shelf (3 columns are needed).



To see all placed columns in the center of the screen, click the Reset Position icon in the upper left corner.



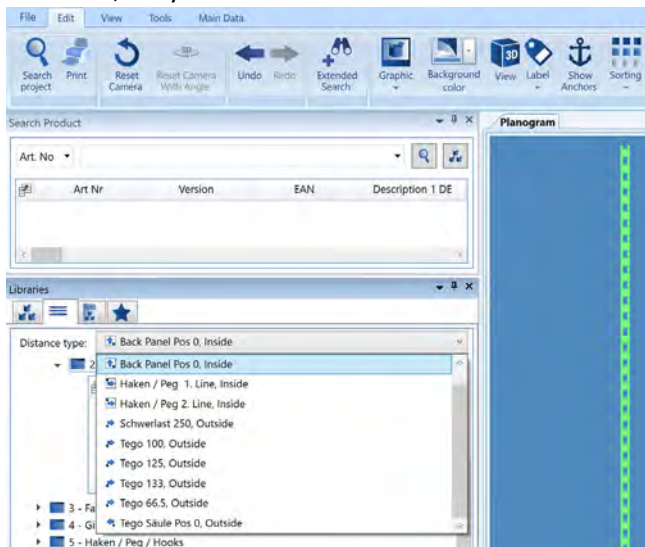
You can clearly see that the last column is displayed in green and is therefore selected.

You could now place further columns by double-clicking and the last column will always be selected and the Distance Manager will always ensure the correct distance when placing the following column.

Place back panels

The next thing you need are the back panels, which have to be placed on the columns. As with all objects in easyBoard, you can of course do this manually by dragging and dropping with the mouse, the back panels know their place and know that they are only allowed on the columns.

However, easyBoard also offers a faster variant here.



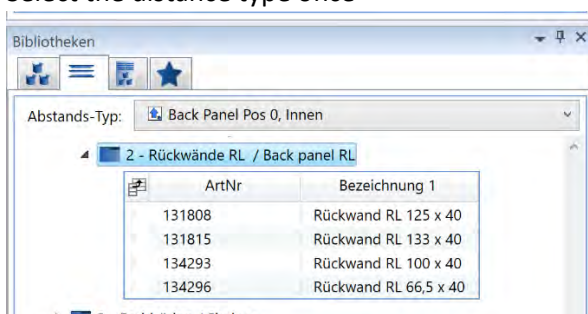
Go again briefly to the Distance manager and select the entry Go again briefly to the Distance manager and select the entry back panel Pos 0.

Now click once on the first column that you have placed (you must briefly tell easyBoard where the next objects are to be placed). As soon as the column is marked green go to the backpanels in the libraries (for example the one with the ring perforation and the abbreviation RL) and double click on the 125cm wide and 40cm high backpanel.

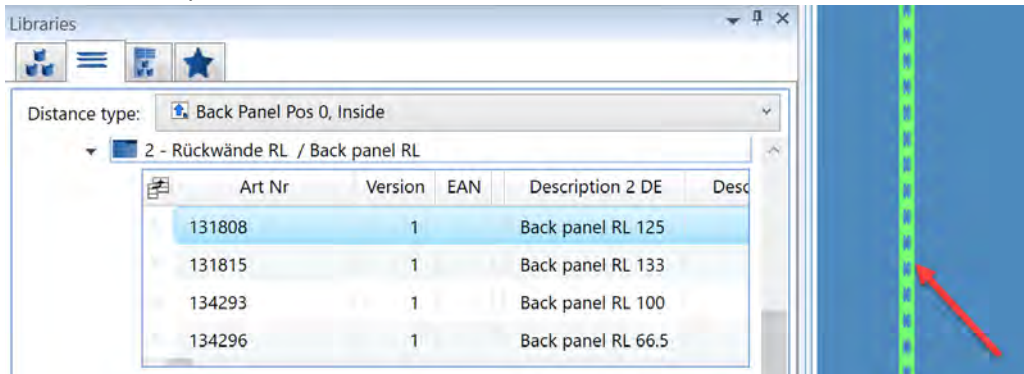
Immediately this is placed to your marked column at lowest position.

After this is placed, double click on the entry in the library until the first column is filled with back wall parts. Now click on the next, i.e. the second placed column with the mouse and again double-click on the library entry until the column is filled. This is also done with each additional column. So you only have to mark where something should go and the double click does the rest. In the following the placement of the back walls once again in detail:

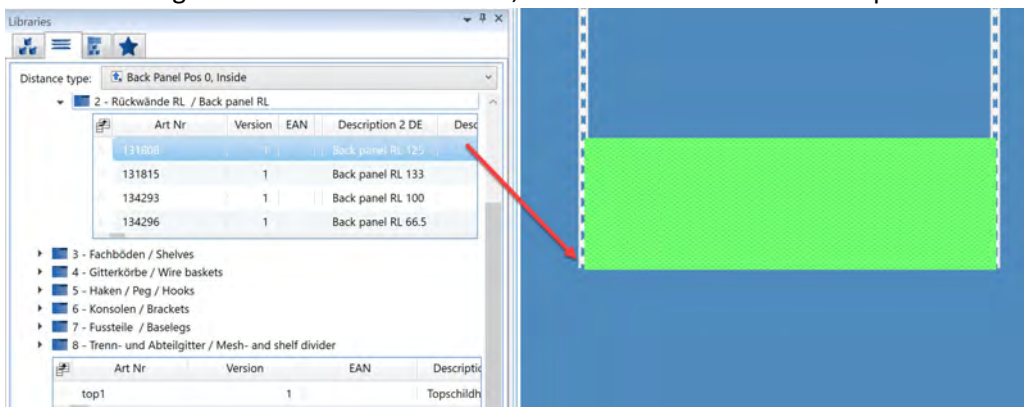
Select the distance type once



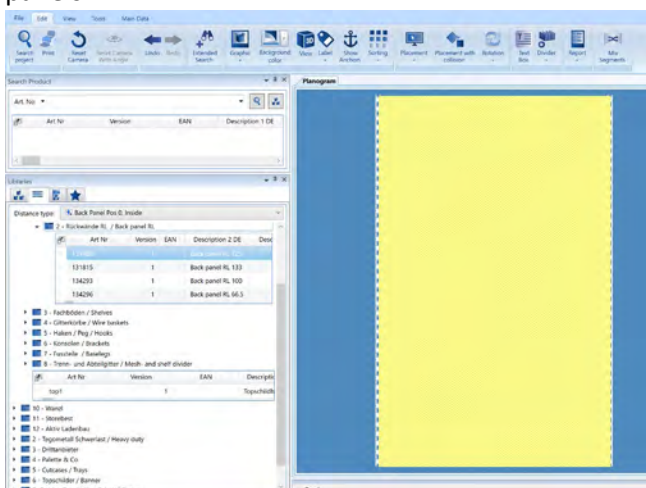
- a) Mark column by mouse click.



- b) Double-click on the entry of the back walls in the library.
Double-click again for the second backwall, for the third and fourth back panel.



- c) Mark the next column with a mouse click and then double-click again to place the back panels.

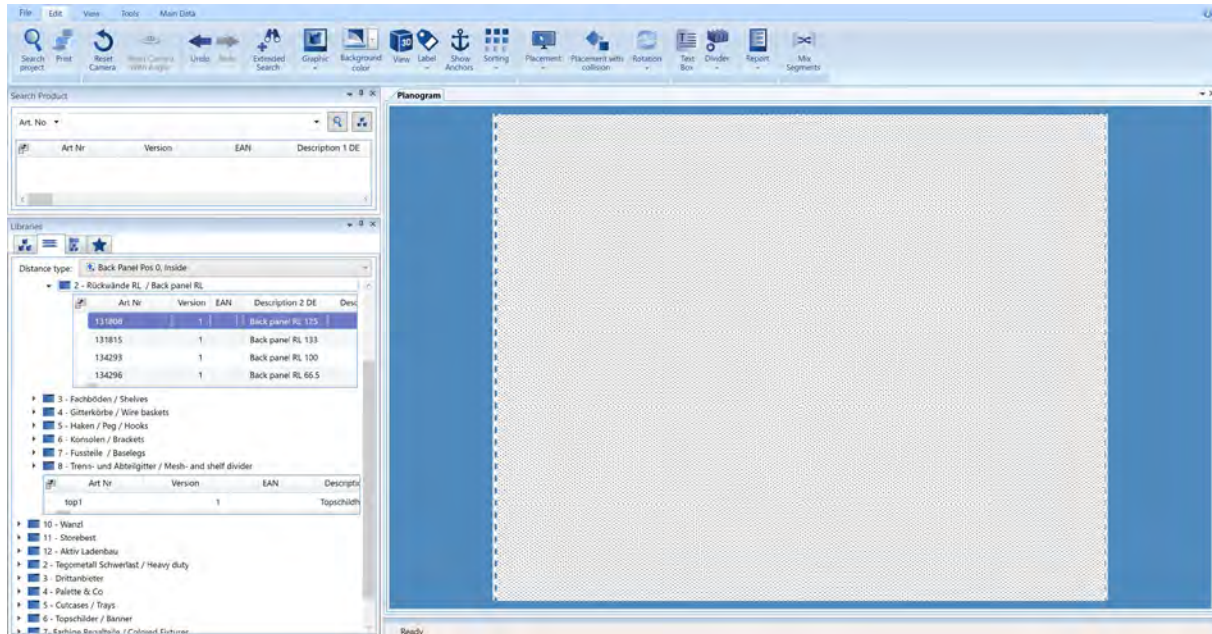


The walls are currently displayed in yellow because you have selected the line of the entry in the library. If you click there once on another entry, the back walls are displayed in their original color.

This 'yellow marker function' is used to quickly and efficiently find a specific product or shelf part in its place on a full shelf.

By the way, once placed products or shelf parts are displayed in the library with a blue marker.

Your finished shelf should look something like this after all the double-clicking:

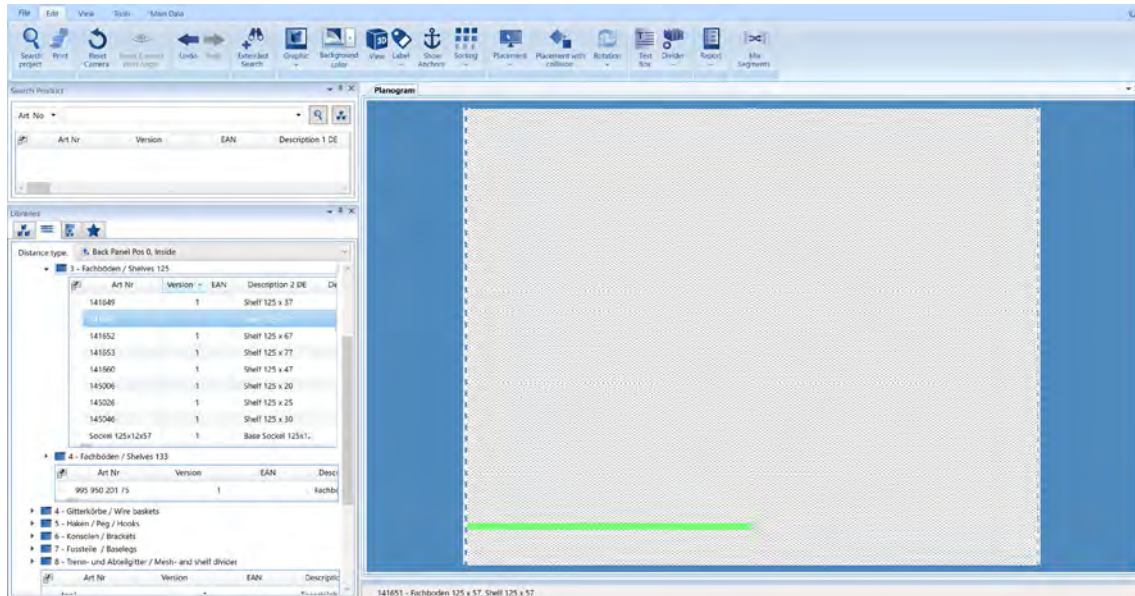


Place shelves

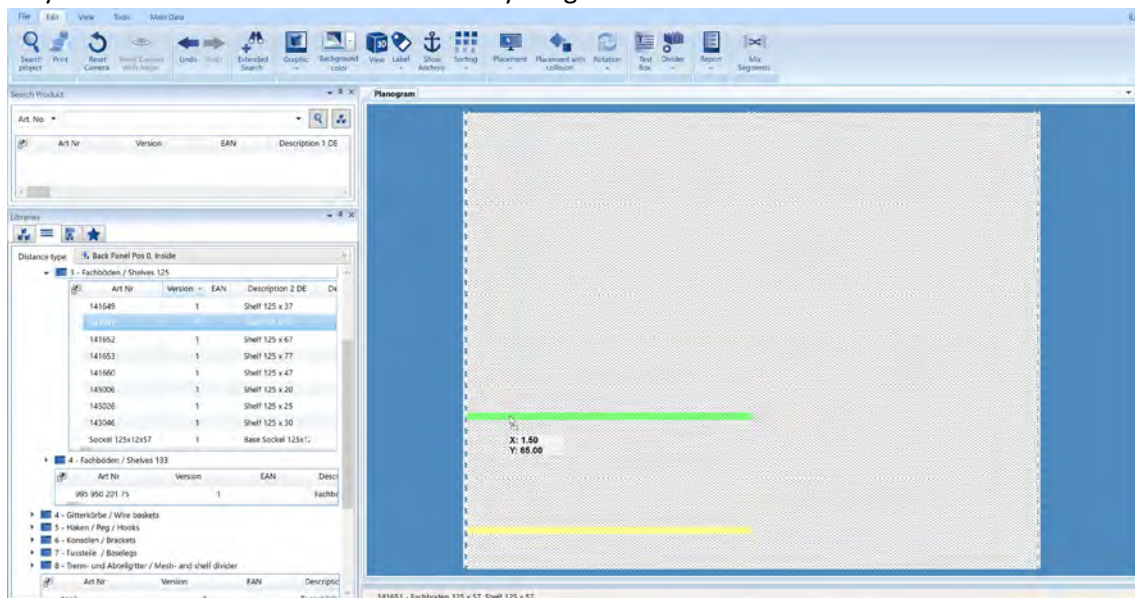
The next step is to place the required shelves in the rack. Here, too, easyBoard helps with its internal grids. Go to the library with the shelves in the entry 3-Shelves/Shelves 125.

Here you will find all existing shelf depths for the width of 125cm. Click on an entry (for example Shelf 125x57) and hold down the left mouse button. With the mouse button pressed, drag the desired shelf to the first column (the mouse pointer is the important position here, it must be brought to the column) and, without releasing the mouse button, move it up and down a few times before bringing it to the final desired position and releasing the mouse button there. You will notice that when you move it vertically, the floor knows exactly the right grid and locks every 5cm.

The first placed shelf is automatically marked green when you release the mouse button (in the following image at the lowest position in the first shelf segment). This gives you the possibility later to place products directly by double-clicking without having to select them again.



After you have placed the first shelf, go directly back to the library and place a shelf with a depth of 47cm. Please place this shelf at a height of 65cm. How you can see a height in the shelf? Look at the numbers below the mouse pointer. There the X-value stands for horizontal position and for vertical position the Y-value is valid. So your Y-value should show 65.00 if everything is correct.



By the way, you can move a shelf to another position at any time.

Simply click on the shelf and hold down the left mouse button.

Now repeat this game until all shelves are placed (view the library, select the shelf, drag the shelf to the shelf with the left mouse button pressed and release the mouse button at the desired position).

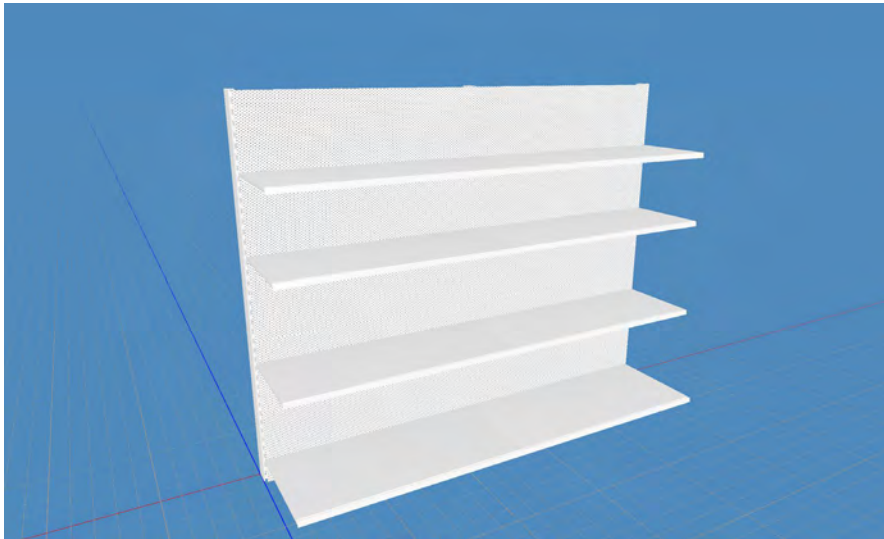
Tip: The position where you place is always also the position of the mouse pointer. This must be moved up and down on the corresponding column in order to move the shelf along the column grid.

Copy placed merchandise supports

But placing more shelves with the same measurement is even faster:

If you click on the shelf you just placed at a height of 50cm, hold down the CTRL key and now drag the shelf upwards while holding down the left mouse button, you will see how the previous shelf is automatically copied and can be placed in a new location.

In the end, your shelf should look something like this:

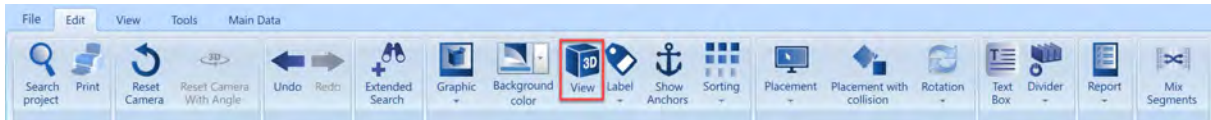


If you look at the picture above, you will surely notice that our shelf stands diagonally into the room and not flat from the front as you see it.

View project in 3D

As you know easyboard can be 3D at any time.

There is a button at the top of the Edit menu (which should currently be visible on your computer) that contains an icon with a cube and the label 3D:



If you click on them and then move the mouse pointer to the center of your shelf (one of the back panels or a shelf should be displayed in green) hold down the right mouse button and move the mouse from right to left.

Back to placement.

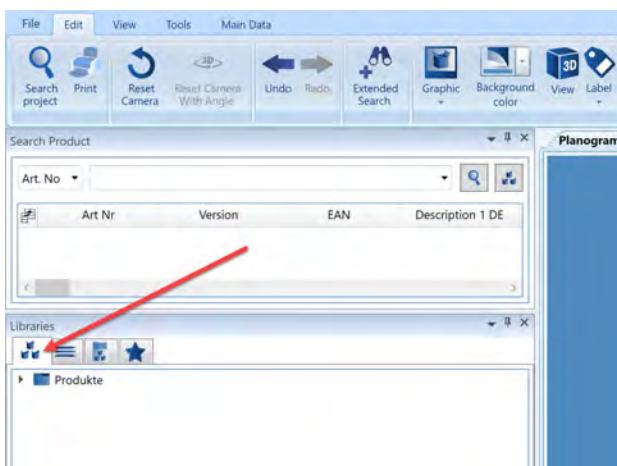
You are now missing a few products to further complete the shelf. First, we switch back from the 3D view to the 2D view. Instead of the 3D cube, the button is now shown with a rounded square and labeled 2D.

Click on it and the shelf presents itself centrally and again in the 2D view.



Place products on shelves

To do this, we will switch from the library of trays to the library of products. As shown at the beginning, you just need to click on the icon for it (to the left of the library of trays) and your products will be available for placement.

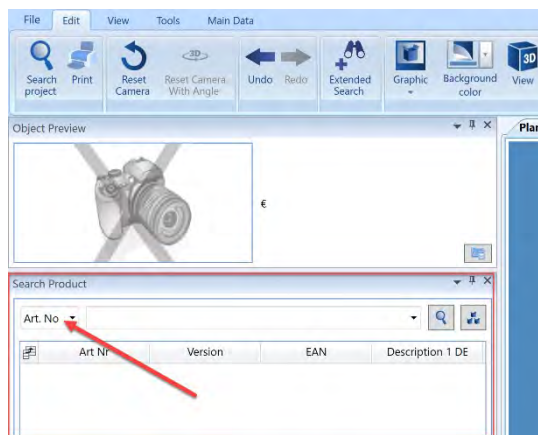


In principle, the way of working with the products in the library is the same as with the product carriers:

- Open the library by double-clicking
- Select the product and move it to the shelf with the left mouse button pressed.
- Alternatively, click on the shelf once with the left mouse button and double-click on the desired product to place it.

But let's take it one step at a time:

Go to the product library and click on a product there.



(alternatively to the selection of products in the library you can also use the search window placed above the libraries to find search window above the libraries, you can enter an article number enter)

Hold down the left mouse button and drag it with the mouse onto one of the previously placed shelves. Make sure that the mouse pointer is guided to the upper edge of the shelf (easyBoard recognizes where a product is to go).

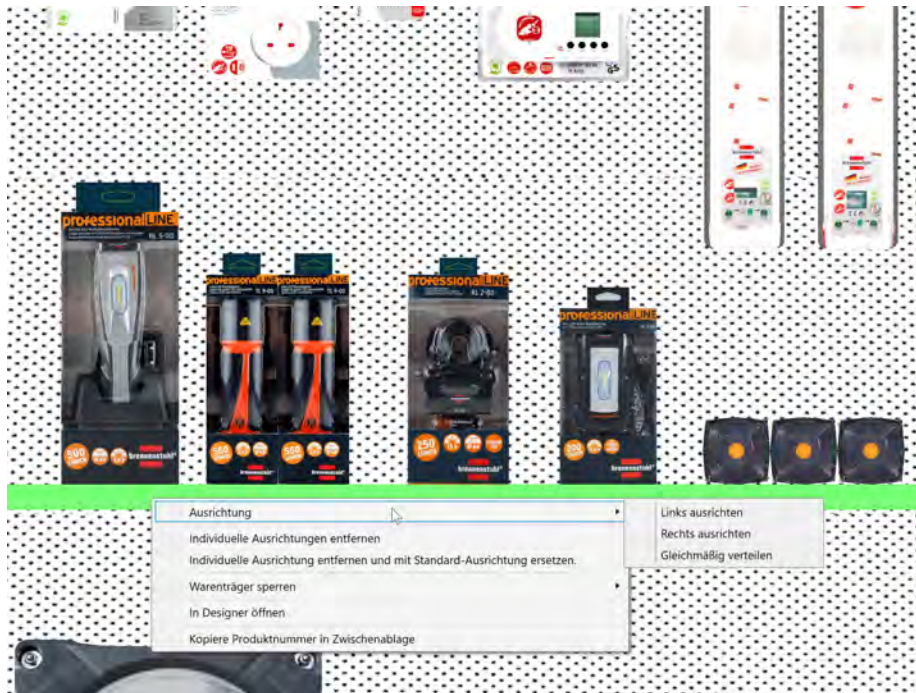
You will see how the product snaps onto the floor and stands up.



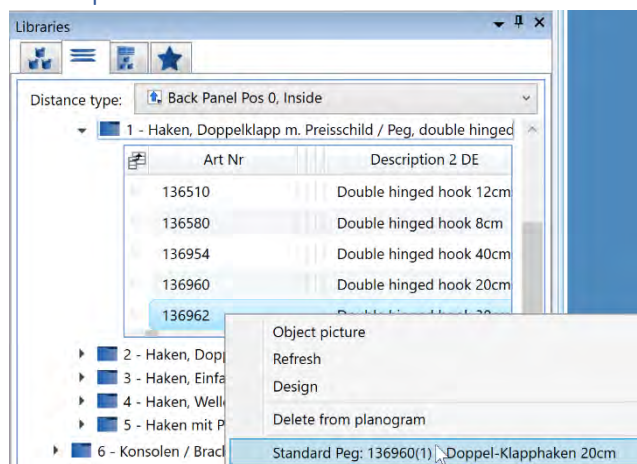
You have already seen another and perhaps even faster way of placing products in the product carriers. Selecting an object and then placing it by double-clicking on it. This is also possible with products. Click on a placed shelf and then double-click on a product in the library. The product places itself immediately and left-aligned on the selected shelf. As long as this shelf remains selected (only if you click in the 3D window on another place or another object the selection is removed) you can double-click on further products. If

the shelf is full, click on the next one and the double-click game with the products continues.

Tip: If you have placed products manually and by dragging them in with the mouse, there is no automatic left-justification. However, this can easily be made up for. Click on the shelf with the left mouse button and it will be highlighted in green. Now click on the same shelf with the right mouse button. A context menu will open that offers the desired left-alignment (and other options like right-aligned, spread, etc.). Click the option again with the left mouse button and you can see how all placed products are immediately left-aligned.



Place products with hooks



The next step is to place products that are hung on a hook. easyBoard also makes this easy and efficient. To do this, briefly switch to the goods carrier libraries and select a suitable one for your hangings in the library '5 - Hooks'. Click on it with the right mouse button and select the lower option 'Standard hook'. Now this hook is selected for everything you want to hang in this project. This is valid until you set another hook as default.

By the way, easyBoard remembers this setting as soon as the project is saved.

If you reopen and edit the project at a later time, this check mark is automatically set again.

After selecting the default hook, switch back to the product libraries and drag a product onto the perforated wall (the product must have the 'hanging' property). Automatically, when you let go of the product, a hook will be placed and the product will be and, depending on the setting, the hook is filled (documentation on placing products).



Here is an example of a stocked shelf:



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Printout options

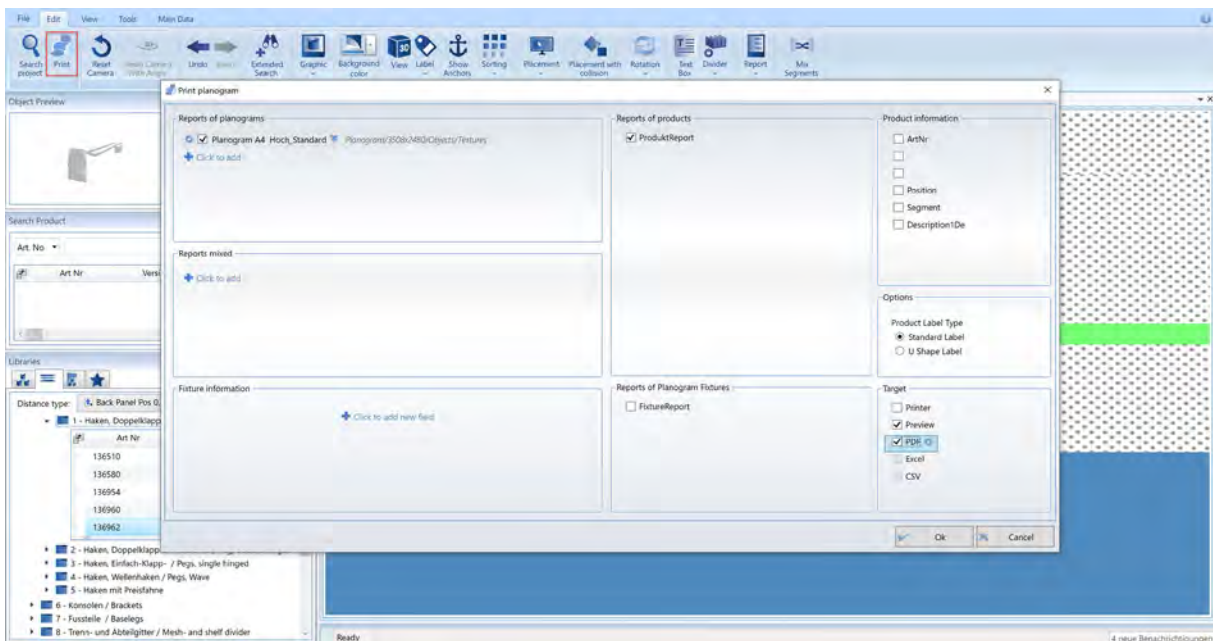
When you have finished working on your project, it's time to share the overall result with your client. You can do this by printing it out or saving it to a PDF document.

easyBoard has a central print menu for this purpose for all output options around a project.

Simply click on the 'Print' button at the top left.

(Alternatively, you can also use the key combination CTRL + P).

You will now be taken to the easyBoard print center:



Options

Print type

3D screen

Planogram

Use top view

Resolution (pix): 3508 x 2480

Planogram segmentwise 1

Fixture options

Only fixtures

ArtNo. of fixture

PosNo. of fixture

Graphic

Objects/Textures

Objects/Surfaces

Wireframe

Divider options

Print Divider Position X

Position X of Divider from 0 to End

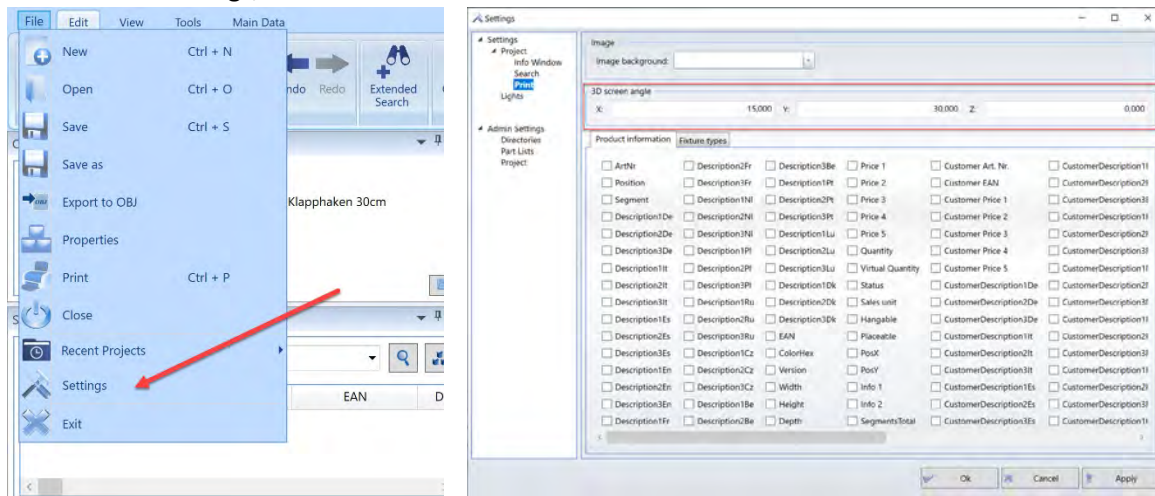
Position X as Space Between Dividers

The window is divided into logically arranged areas that contain the individual options for you.

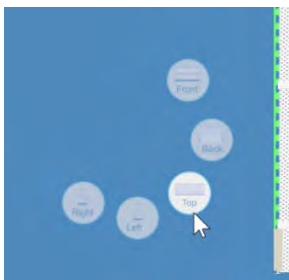
In the Options area, right at the top left, you select how the shelf is to be graphically brought to paper or PDF.

Print type

- 3D screen, prints the view that you have stored in the settings under Project (menu bar), Settings, Print.



- Planogram – a 2D view of the complete project.



In addition, you can also select the top view here.

(e.g. if you have created a pallet line. To do this, select the respective goods carrier and press the 'V' key, a small menu opens and you can select the desired view.

- Planogram by segment, prints a single page for each segment. The top view can also be switched on here. The number in the field next to it indicates how many segments / units should be printed on a printed page. For example, if you have 4 segments and enter the value 2, you will get two pages printed with two units per sheet. You per (because you may have rotated it in 3D view in the project screen).

Graphic

- Objects / textures - if this option is enabled, the graphics of products and product carriers will be printed as well.
- Objects / Surfaces - prints a shelf only in the colors of objects, without graphics.
- Wireframe model - prints the project in a wireframe view.

Merchandise support only

- Warrant ArtNo - prints a project without products, only with the used warrants and with the indication of the item numbers of the warrants.
- Warp carrier PosNo - prints a project without products, only with the used warp carriers and with the indication of the item numbers of the warp carriers.

Tray divider print position X

- Tray divider position X from 0 to end
- Position X as distances between the compartment dividers

This option allows you to display the exact position of the placed dividers in cm when using dividers on shelves or wire baskets. An option that your store managers will appreciate very much.

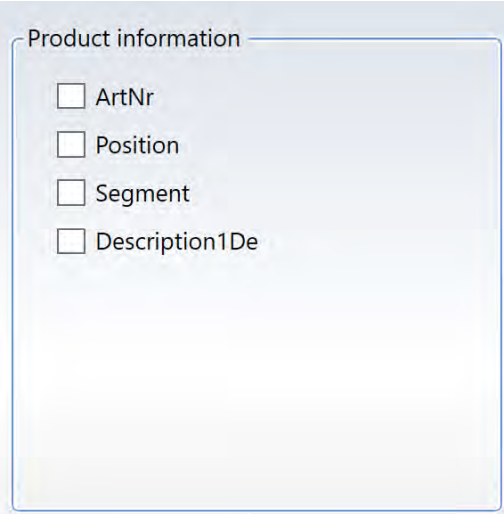
Shelf information

If you activate this option, you can print out, for example, the printout of the height information of the placed shelves. (Selection: Position Y and shelves).

Tip: Most options can be combined with each other.

Produkt Informationen

In the Product information area, you activate which article information is to be printed on the project image. For example, you can also print the corresponding item number on each article.



Product information

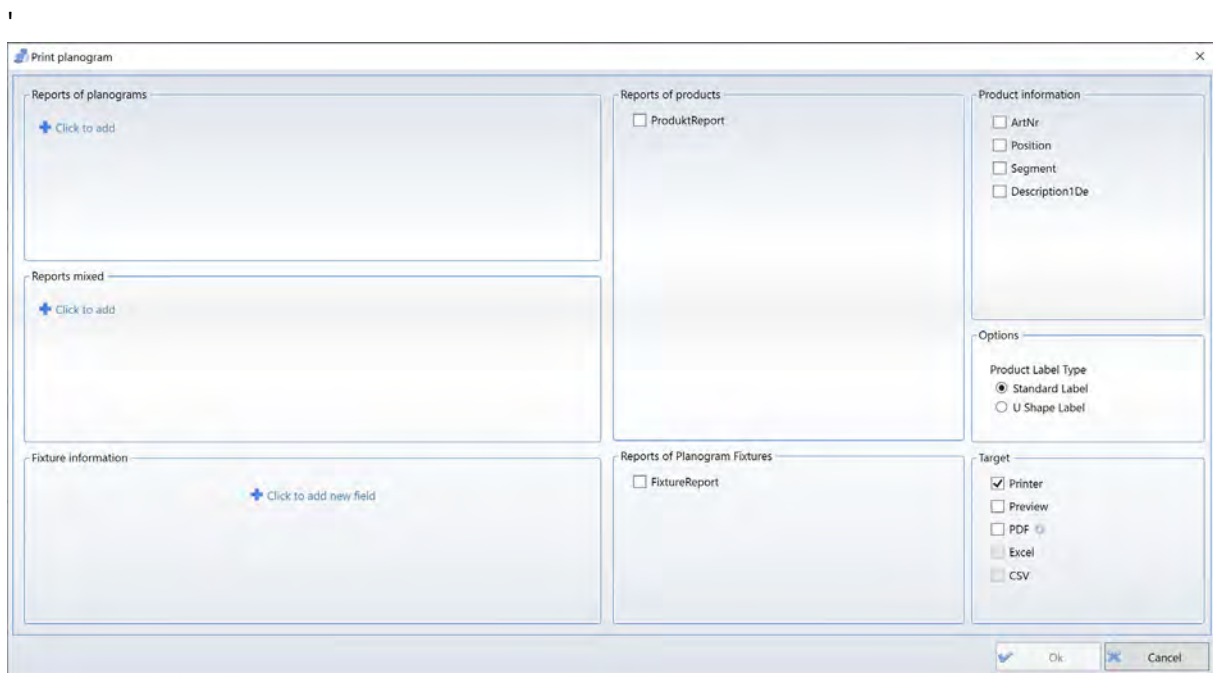
- ArtNr
- Position
- Segment
- Description1De

By the way, all existing article data fields can be printed. The selection you get here in the print dialog depends on your program settings (see Tools - Settings - Print).

Printout forms

The different printout options are clearly arranged.

- Forms for printouts in graphical form can be found in the Planogram Printout area.
- Forms for printouts of planograms with an integrated list of product carriers can be found in the Mixed Reports area.
- Forms for reports and listing of placed products can be found in the Product Report section.
- Forms for listing of used product carriers / shelf parts can be found in the area Reports of planogram product carriers.



Destination

Here you define where or in which format your printout should be sent/saved.

- Printers - here you can reach all printers installed on your device.
- Preview - gives you a view of the print result on the screen for the selected forms.
- PDF - creates one or more PDF documents
- Excel – erzeugt ein Exceldokument aus den Reports. Only for forms from the areas Product Report and Reports of Planogram Merchandise Carriers.
- CSV - creates a text document (with

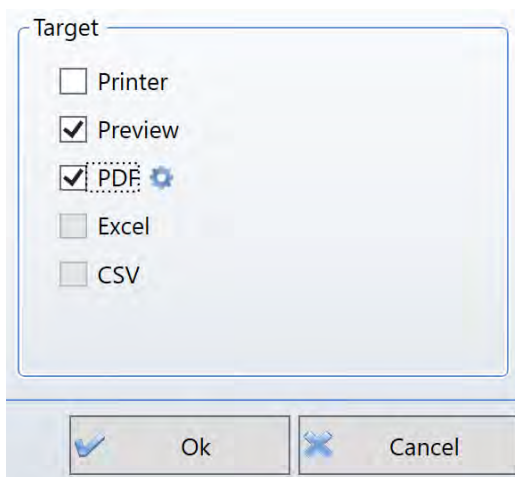
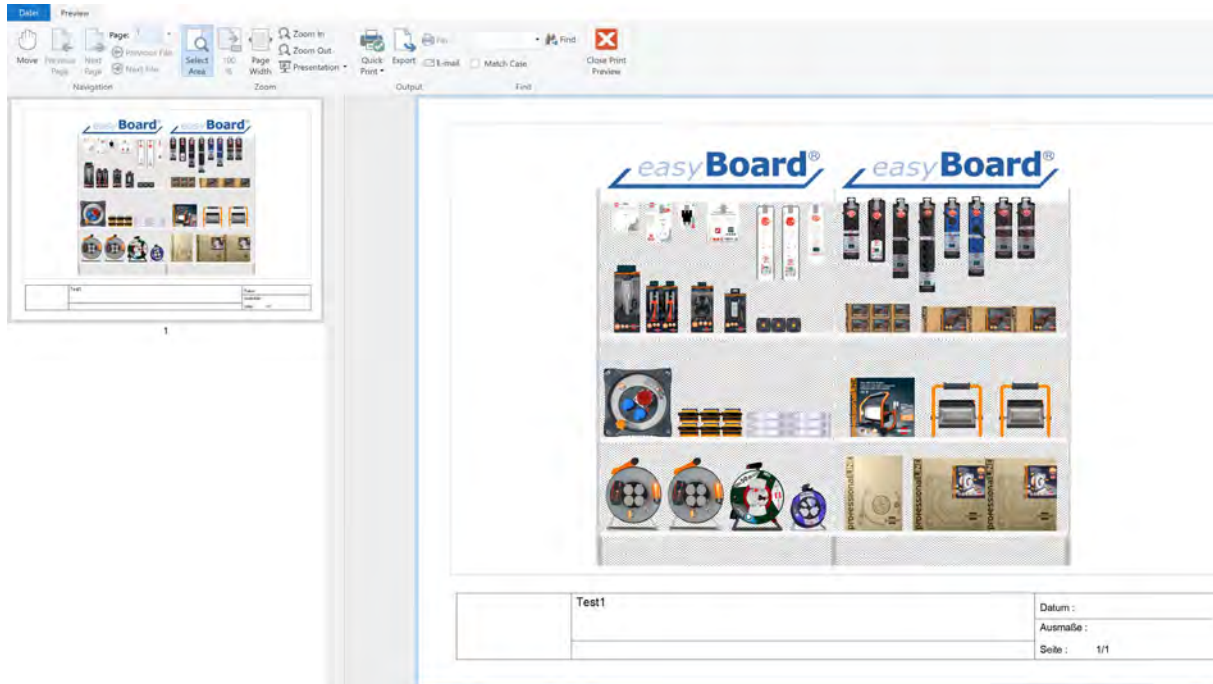
semicolon as separator) from the reports.

Only for forms from the areas Product Report and Reports of Planogram Merchandise Carriers.

Preview

The Preview function can be found under the 'Target' menu.

If the checkmark is set here, clicking the OK button opens a new window with the preview of your project.



Clicking the OK button starts the printout.
The Cancel button closes the Print Center,
without starting the printout.

If you have any questions about the program or need further information, please write to:
info@easyboard.eu