



# EQ CALENDAR APP SETUP & INSTRUCTIONS

## OVERVIEW

EQ Calendar App will extend the use of your desktop EQ Software to mobile devices for your installation team. Using a phone or tablet your fitters and any remote workers have immediate access to your central EQ Resource Planner, Diary and CRM including shared files attached to appointments or customers. Note that EQ Professional desktop software is required in order to use this mobile app.

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## Requirements

EQ Professional is required on at least 1 PC so that the Diary and Resource Planner can be used and linked with the mobile app. This instruction guide will help you check and achieve the following pre-requisites in your EQ system:

- Diary actions are configured to show in EQ and on the app
- Valid actions are available for your resources in EQ
- Users exist in EQ and access to Calendar App features are setup in EQ user groups
- Cloud configuration is setup in EQ

EQ Cloud needs to be installed on 1 PC, preferably a dedicated server PC, which has access (over a wired network) to your EQ databases. This will become your EQ Cloud server and is used to send and receive data between EQ and your mobile app.

EQ Calendar App will run on Apple and Android devices, specifically the following are supported:

### **Minimum specification for Apple devices:**

All devices running iOS 9.0 or above.

Recommended: For phone - Apple iPhone 6 or newer. For tablets - Apple iPad Air or newer.

### **Minimum specification for Android devices:**

Phone or tablet running Android version 7.0 Nougat or above.

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## Installation Procedure

Run EQ Cloud installer on your designated server PC, as above. This will be provided with your order email from EQ support.

No further installation is necessary for any other PCs running EQ.

On your mobile device download the EQ Calendar App from the App Store or Google Play Store.



## Setup Actions in EQ

Actions are part of all Contact History entries in EQ, and Contact History entries are what appear in EQ's *Schedule*, *Diary* and *Resource Planner*. EQ controls which actions to show on those screens in EQ and which actions to show in the EQ Calendar App. E.g. include your fitting bookings but exclude general reminders.

In EQ open the **Diary > Actions** window to show the below:

Action	Show on EQ Schedule	Show on EQ Diary	Show on EQ Resource Planner	Show on App Calendar	Show on App Contact History	*Colour
Appointment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Call	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Customer Delivery	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Delivery to Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Design@Web Invite	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Diary Note	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Email In	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Email Out	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Fitting	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
General Note	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Installation Slot	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Internal Meeting	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Letter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Measure/Survey	<input checked="" type="checkbox"/>					
Meeting Room	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Phone Call - Incoming	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Phone Call - Outgoing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Reminder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Site Visit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Staff Absence	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Staff Note	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Technical Survey	<input checked="" type="checkbox"/>					
Text (SMS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Text [SMS]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Walk-in	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

For each action you should tick the box to decide where that action should show. The options are:

**Show on EQ Schedule** – The view recommended for supplier and customer deliveries and is driven by dates in your order's accept screen.

**Show on EQ Diary** – The view to show appointments, meetings etc that have durations as minutes or hours.

**Show on EQ Resource Planner** – The view to show multi-day bookings such as fitting, installations, site surveys etc

**Show on App Calendar** – Tick to show contact history for this action on the Calendar App's diary view. (The diary can show single appointments and multi-day appointments). For example you could exclude any actions such as internal meeting room bookings that are not relevant for fitters to see.

**Show on App Contact History** – Tick to show contact history for this action within the Calendar App's contact history view. Within each customer record on the app you can view all contact history (not necessarily viewed on the diary) unless you exclude it here.

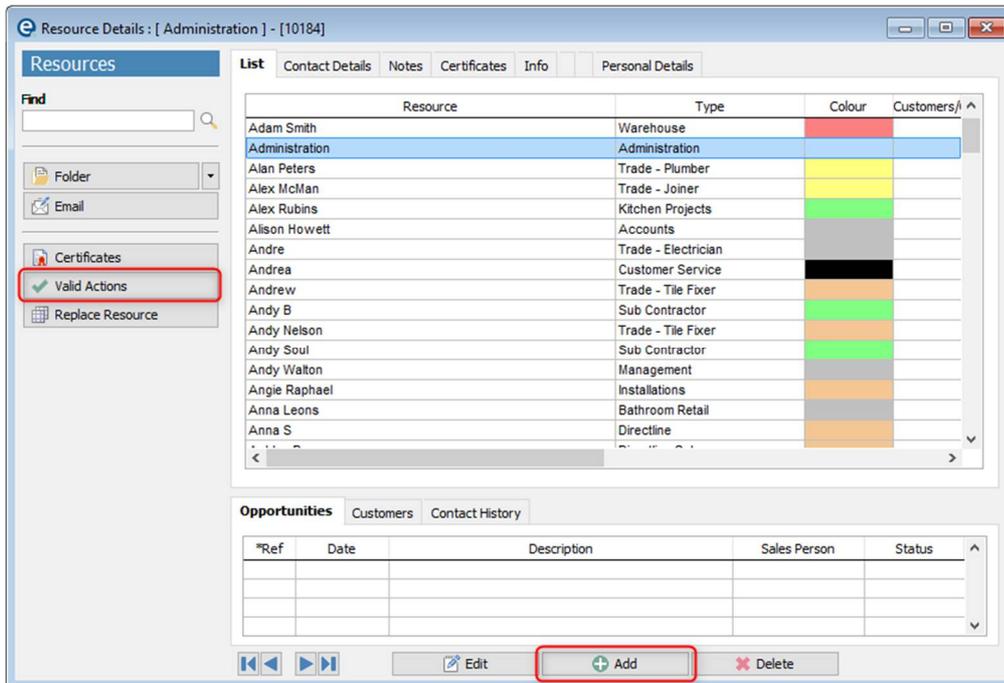
Before updating this screen ensure your required actions all have **Valid Users**, **Valid Reasons** and **Valid Results** by clicking on each of the buttons on the right. Without valid links setup here it could be that none of your users have permission to pick your actions.

**E.g.** for the action "Fitting" you could just have Valid Users who are your fitters or anyone needing to book fitting. This means that "Fitting" will not appear to other users who do not need it.

## Setup Resources in EQ

EQ Calendar App shows the actions selected earlier on each resource's calendar. The resources determine which actions are valid for each resource. E.g. You only need an Action of *Plumbing* to be valid for the resources who are plumbers. So in EQ you would find each plumber's name and set their valid actions as below. Repeat for each resource.

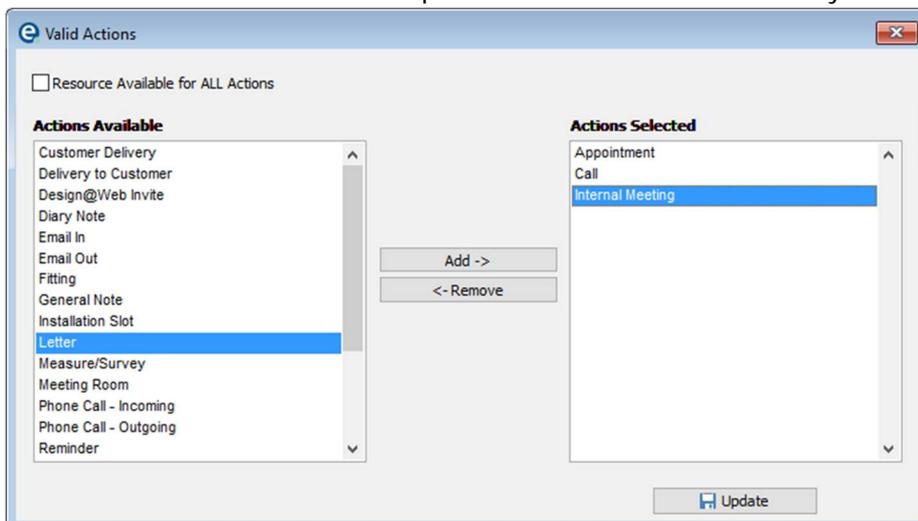
In EQ click the **Diary** button > **Resources** list



Click **Add** to add to your resources if you need to create more entries. Resources will need to be connected to a username in order to be used with the Calendar App.

Click **Edit** and go to the **Contact Details** tab to click the colour swatch to change resource colour.

Click the **Valid Actions** button for each resource to ensure that there are some actions for that resource to be selected. E.g. the resources who are fitters should have at least the action "Fitting" available to them. Un-check the ALL tick box at the top and click **Add** -> for each action you wish to add.



# Resource Groups in EQ

Resource Groups are a way to work with multiple resources. Using Resource Groups in EQ you can add them to filters in the EQ diary, setup plans in Resource Planner and control access in the Calendar App.

Examples could include resource plans for different fitting teams, or for different trades. The example screen below shows one for *Installations* and one for *Decorating*.

Resource Groups need to be setup because when a user logs in to Calendar App they will be able to pick either their own diary only ("My Resource"), and any resource groups for which they are a valid user.

## To setup resource groups:

1. Open the **Diary** in EQ and click **Resource Groups** on the toolbar
2. Click **Add** to create a group name
3. Click that group name and click the **Resources** button.
4. Move each resource from the left to the right using the **Add ->** button and click OK
5. Click on the **Valid Users** button and move some users, who you want to access this group, to the right side using the **Add ->** button and click OK. For example a trades person may be a resource and a user so would need to be in both the valid users and valid resources list.

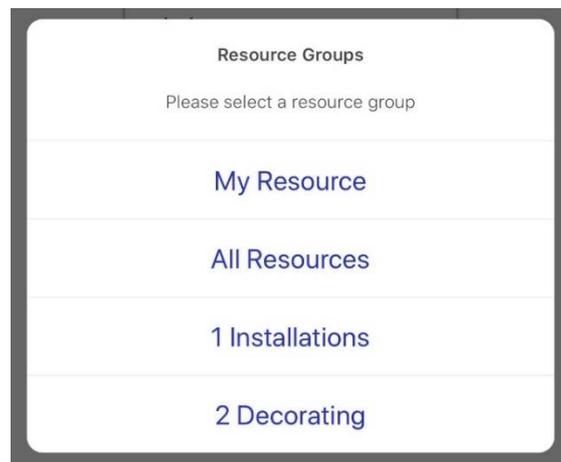
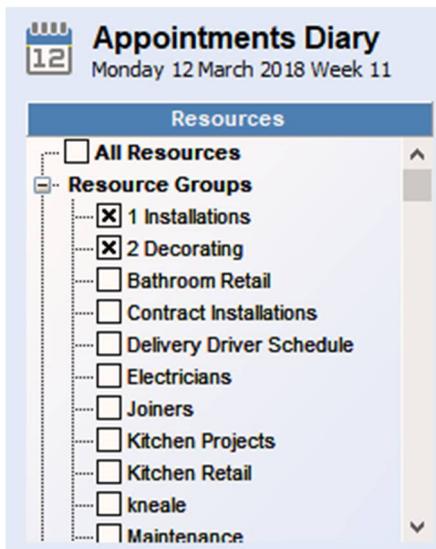


Resource Groups appear as titles in the EQ **Resource Planner** like this:



They can also be used to filter appointments in the **Diary** view like this (left):

(Right) The App login screen showing the user's available Resource Groups:



# Cloud Configuration

These settings in EQ will define how your Calendar App works. Within EQ click **Tools > Customise** and scroll down to **EQ Cloud**. Please contact support if you do not see this option.

## Calendar App Compulsory Fields

Tick the boxes to select which fields you want to be compulsory and therefore they cannot be left empty when creating entries in the Calendar App.

## Calendar App Sync

Tick **Enable** and **Auto-sync** to turn on the app sync capabilities.

Under the **Updates Pending** heading you can view the app updates and the corresponding ID. This is for viewing only and can help EQ support when troubleshooting sync questions.

In **Days Before** enter the number of days prior to the current date that you wish to sync to the app. Recommended setting is 14 days, to give you a fortnight of past entries (before the current day) to scroll back through.

In **Dates After** enter the number of days after the current date that you wish to sync to the app. E.g. 30 days will give you approximately a month's entries. It is recommended you set this between 14 - 56 days.

In **History Months** enter the number of months of contact history to keep updated. Both **Interval** and **File Interval** boxes the milliseconds between sync attempts. It is recommended to set History to 4 months. Do not change the history months or 2 interval boxes without checking with EQ support (the more history you sync, the slower the sync could become).

## Default Display Options

**Day Starts** and **Ends** allows you to pick the timeslots that are visible for 1 day in the app. E.g. you may not need to see 12am to 6am if you do not book appointments at that time.

**Prime Starts** and **Ends** allows you to pick the timeslots that are coloured white in the app. Timeslots outside of prime are coloured light grey.

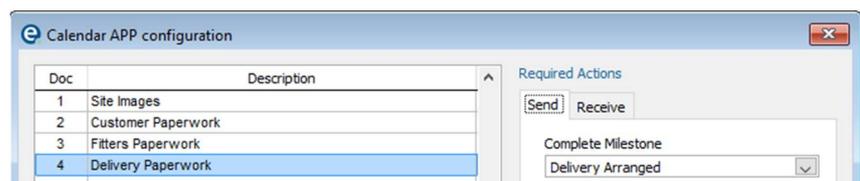
**Appt Colour** controls the colour of the appointment block which you can customise. You can pick from action, resource or result.

**Bar Colour** controls the colour of the appointment block's thin bar across the top (this is the same as the thin bar down the side of EQ's diary). You can pick from action, resource or result.

## Configure Documents

Document types are used as tags when attaching Cloud Files in EQ and the app. E.g. Site Images, Customer Paperwork, Fitters Paperwork etc. When a file is in EQ you can find set milestones to complete automatically.

Click the **Configure Documents** button. Within here you should click **Add** to add some document types.



The Send and Receive tabs will become active with the future release of EQ Calendar App 1.1

# Setup Users in EQ

## Users

To use the Calendar App a person will need an EQ user (in the same way as when accessing EQ).

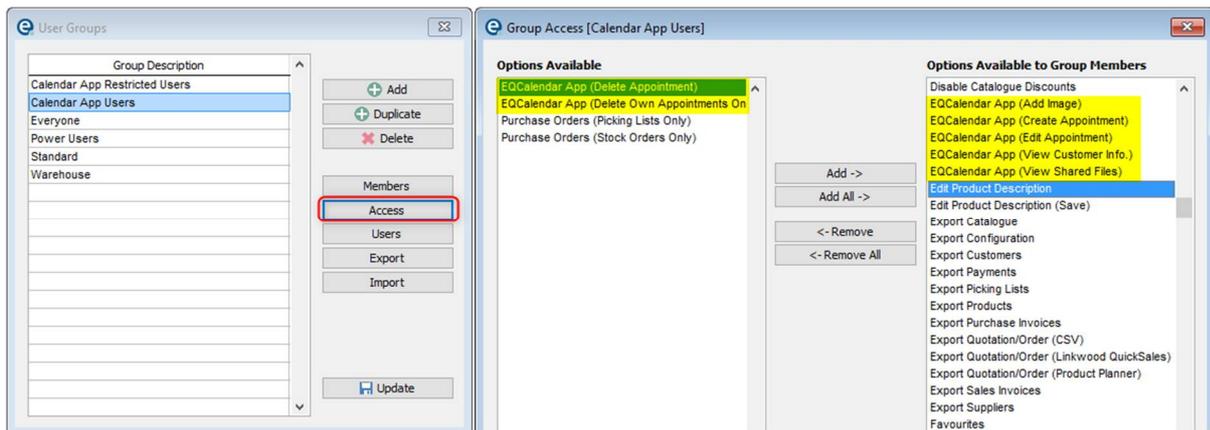
Click **Tools > Users** and **Add** to add a user with a password.

Once a user is created they need to be assigned to a User Group. A **User Group** holds the permissions that the user can perform in EQ and in the Calendar App.

Click each newly created user and click **User Groups**. Move at least one User Group to the right-hand side so that the user is allowed some access.

## User Groups

To define which groups can access features of the Calendar App click **Tools > User Groups**. Click a group name, or click **Add** to create a new group, then click the **Access** button (shown in red below):



The security permissions all begin with *EQCalendar App* (highlighted in yellow above)

In the example above this user group CANNOT delete appointments (because the options are on the left) in the app but they CAN, create, edit, view files and add images (because they are on the right).

Consider the permissions that need to be granted to users of the app as per EQ.

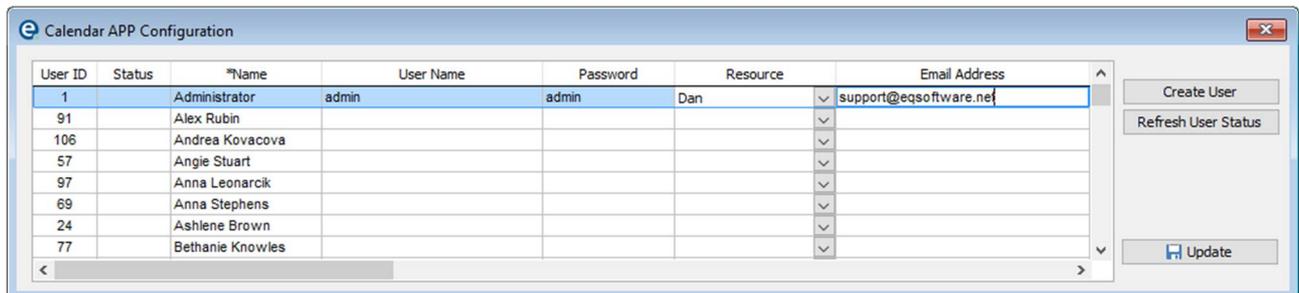
## App Users

Please ensure you have followed this guide in sequence. Now that you have users and resources in EQ you are ready to setup your app users which involves linking a user and a resource. You should already have assigned resources to resource groups as per page 6.

Within EQ click **Tools > Customise** and scroll down to **EQ Cloud**.

If this option does not appear please email [support@eqsoftware.net](mailto:support@eqsoftware.net) and request EQ Cloud is activated.

Click **Configure Users** to open the below screen:



For each person who will need to use the Calendar App:

1. Click a name and enter text for the **User Name** and **Password**.  
This will be used to access the Calendar App so you will need to tell the user their details.
2. Select the appropriate **Resource** from the drop down box.
3. Enter the user's **email** address (it should be the email address on their mobile device) and **mobile** number
4. Click the **Create User** button on the right.  
This user will now be emailed an invitation to download the Calendar App and an activation code.  
They should open this email on their mobile device.

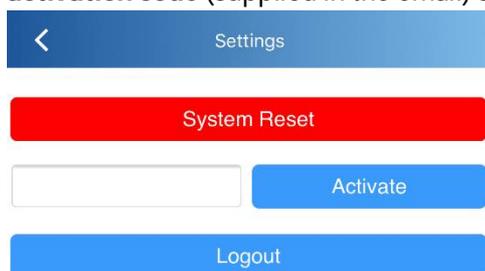
The **Status** column will show *Active* or *Invited*. It will refresh when loading this window, and you can click **Refresh Status** on the right.

The number of simultaneous users you can add is dependent on the number of EQ Calendar App licences that you have purchased.

### On the mobile device:

The user receives an email with a link to download the EQ Calendar App from the app store.

Once downloaded, the user should open the Calendar App and tap the cog icon , and enter the **activation code** (supplied in the email) and tap **Activate** (below):



The app is now activated and the chosen username and password will allow login.

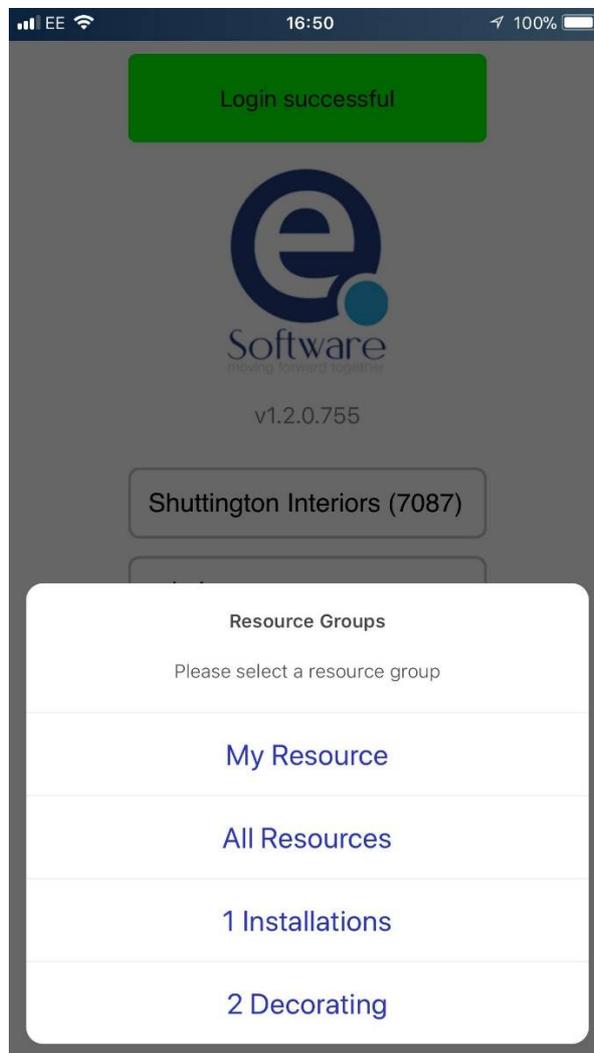
## Calendar App Logging In

### Logging In:

When you launch the Calendar App you need to login with the name and password for a user who has been setup as per page 8.

Upon login the user will be presented with an option screen depending on the Resource Group settings:

- **My Resource** – The appointments for the current user only
- **All Resources** – The appointments for all the resources in your diary and resource plan
- **Resource Group Name** – There will be 1 entry per resource group name for each resource group that this user has been added to (as per page 6). Tapping the resource plan will load appointments just for those resources. The 2 examples below are "1 Installations" and "2 Decorating"



If you have adjusted resources and resource groups in EQ, you will need to log out of the app, and back in to see the changes.

## Calendar App Diary View

Diary in single day view (the only view available on phones). Swipe left or right to move one day at a time.

Note that **multi-day events** from the Resource Planner show across the top (they span across days or half days as per EQ) and other entries from the diary show within the day at the appropriate time.

When an appointment is for 0.5 days or less it will show in the hourly view. However when it is for more than 0.5 days it will show at the top as per the multi-day events.

**Contact history entries** from the diary are the appointment blocks like the yellow one shown.

Tap an appointment block to be taken to the edit screen (shown right).



Tap to show List View. This shows a flat list of the entries currently on the diary.

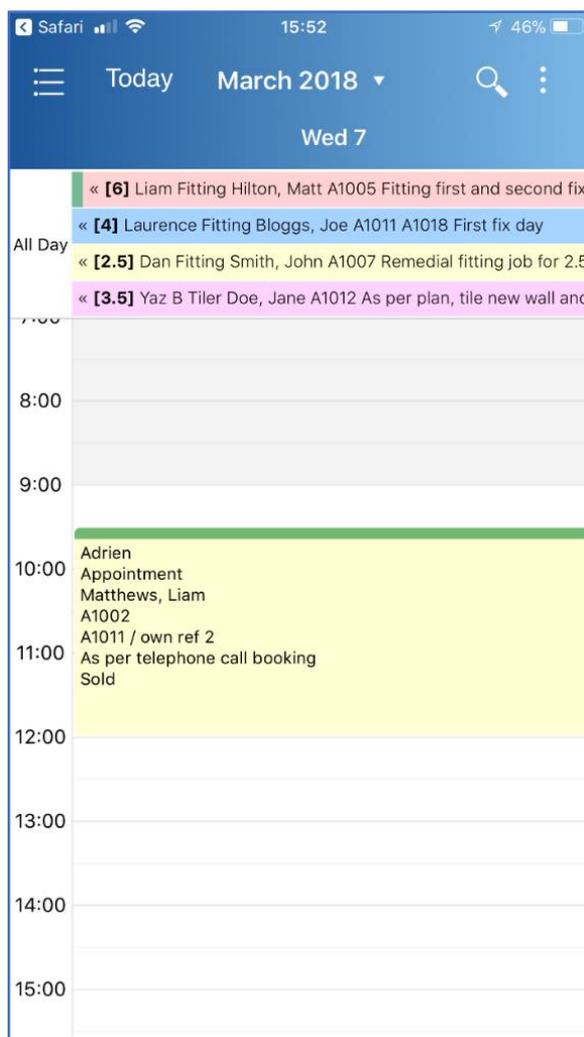


Tap to access Search by Customer or Appointment. Search operates across all text fields, e.g customer account number, address, postcode, email address etc



Tap to add appointment, view settings, change view (7 day, 21 day and 28 day are available on a tablet only) or log out.

Tap the month name at the top to be taken to a calendar to pick another day to view. Tap the month again to hide the calendar.

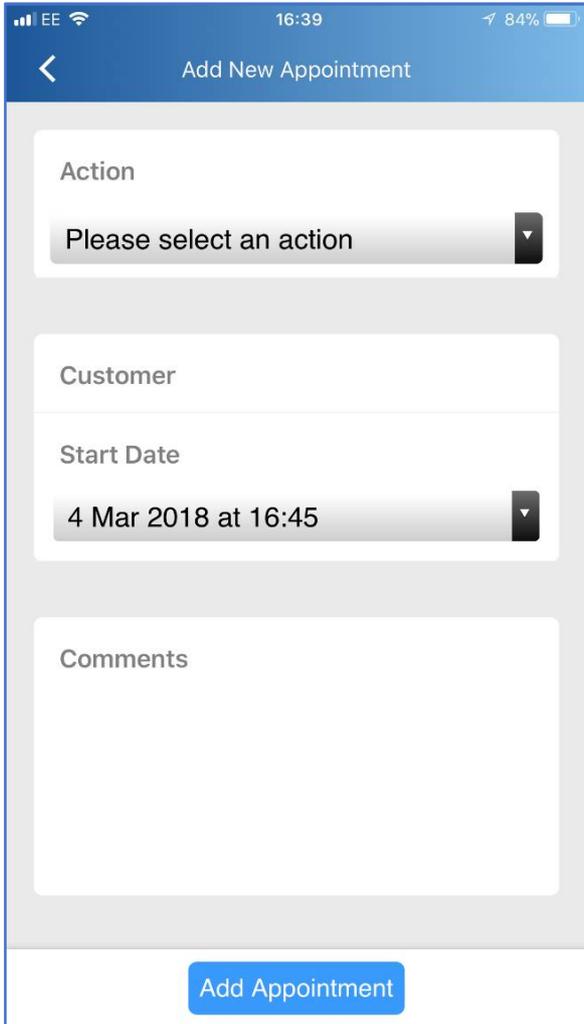


## Calendar App Add Appointment

Tap the menu button and select **Add Appointment**

OR

Tap on a time in the diary view to create a new blank appointment.



### **Action:**

Select action from the drop down list. This will only show actions that have been selected for the logged in user. See page 4 for help setting valid users on actions.

### **Customer:**

Tap in the box and scroll, or begin typing a few letters at the start of the customer's name to filter the list.

### **Start date:**

Tap to change on the drop down box

### **Duration:**

This will appear only once you have selected an action. It will displays hours and minutes if the action is from your **EQ Diary**, or days if the action is set on your **Resource Planner**.

Tap to select from the drop down options.

### **Resource, Reason & Location:**

Tap to select from the list, or type a few letters to start filtering down the list.

These drop down boxes follow the same business rules as set in EQ, therefore it will maintain the filtered list so you can only access valid resources, reasons and locations.

### **Comments:**

Tap to show the keyboard and enter free text notes. You can tap the top blue bar to dismiss the keyboard.

### **Results:**

Tap to select from the list, or type a few letters to start filtering down the list.

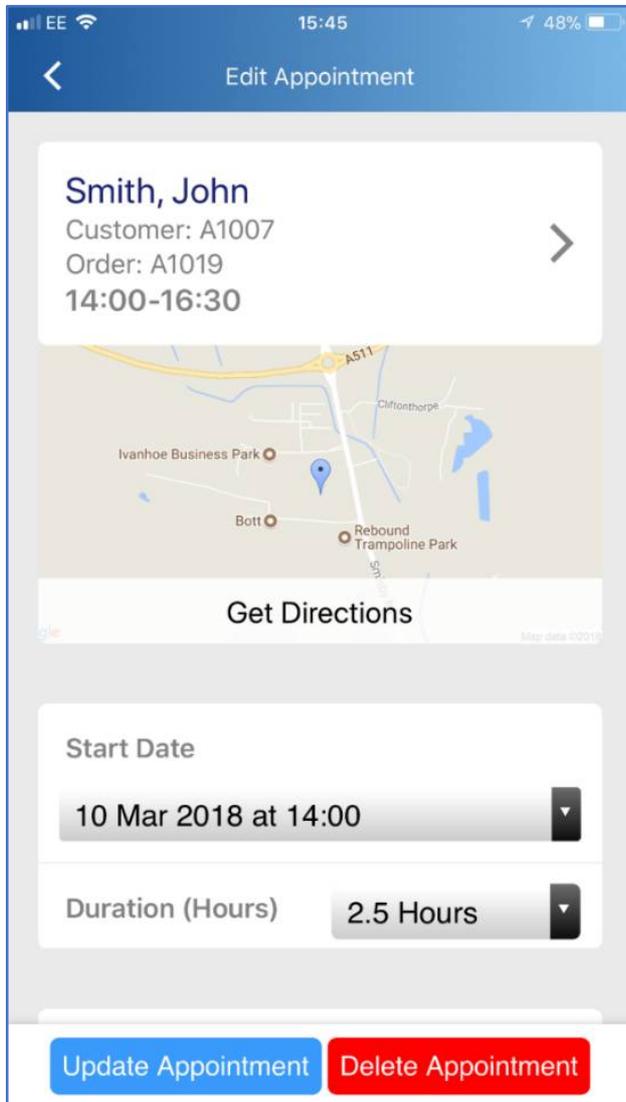
NOTE: Swipe down on the main area of the screen to dismiss the onscreen keyboard and date/duration picker.

Tap **App Appointment** once you are ready for it to be created. You will be returned to the diary view.

When the appointment is saved initially the details in the block will show basic details. Once it has refreshed the appointment block will update to show the details you have set in EQ's Customise menu in the Diary screen.

## Calendar App Contact History

You can tap on any contact history entry and view the detail in the below screen:



Customer details show across the top with customer name, reference, order number (if assigned in the contact history in EQ) and appointment time.

The map shows the customer's location based on their postcode.

Tap **Get Directions** to launch the default maps application on your device and begin navigation.

Depending on your user permissions you can edit the following:

Start date, duration, resource, reason, location, comments, result.

Note that you cannot edit the action of an existing contact history. Instead you should delete this entry and create a new entry.

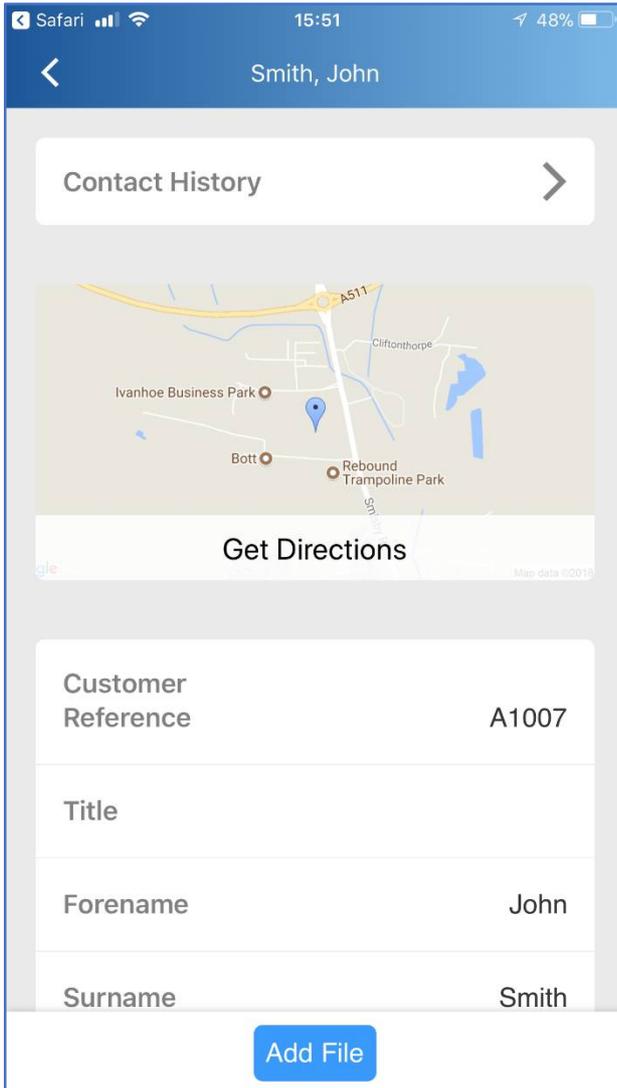
Tap the customer name, and area near the > arrow to view the customer record.

## Calendar App Customer Record

The customer record displays as below and is read only in the app. Scroll down to view all the customer details.

Tap **Get Directions** to open the default map application with directions to your customer's address.

Tap **Contact History** > to view all of the contact history entries for the current customer. They are displayed in chronological order as per the same view in EQ's customer screen.



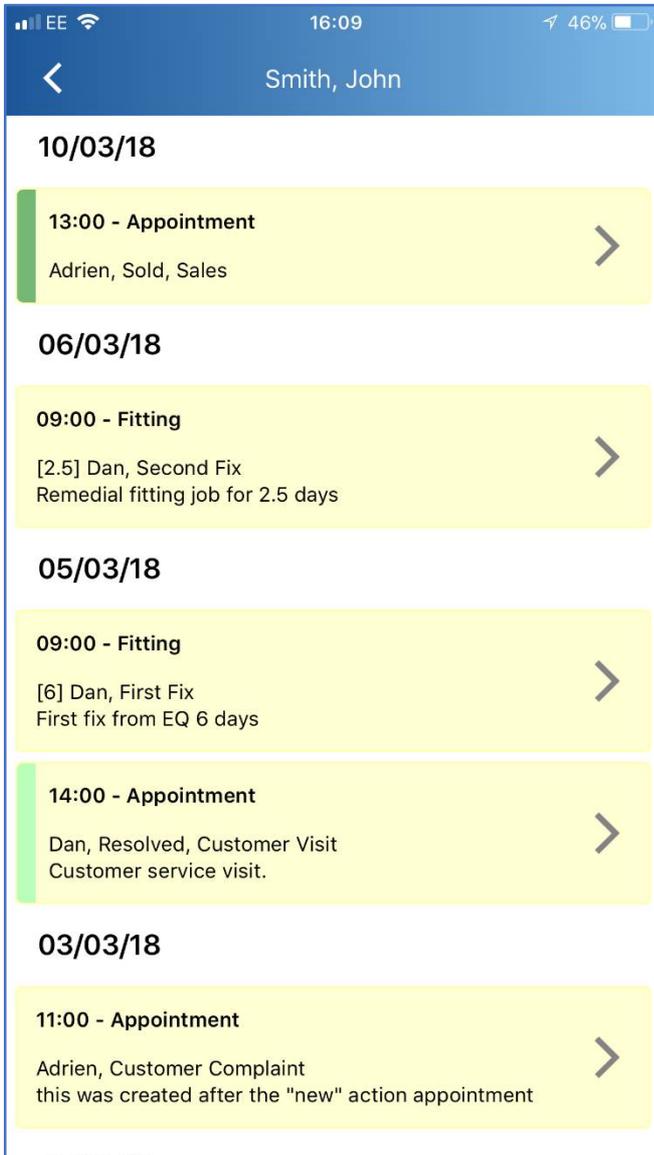
Any files attached to the customer (and associated contact history entries) will appear at the bottom of the screen. Tap each file to open.

Tap **Add File** and see **Cloud Files** in the next chapter.

## Contact History List

When viewing a customer record, tap **Contact History** > at the top.

This shows contact history for 1 customer record in chronological order:



This view follows the same colour configuration setup in EQ.

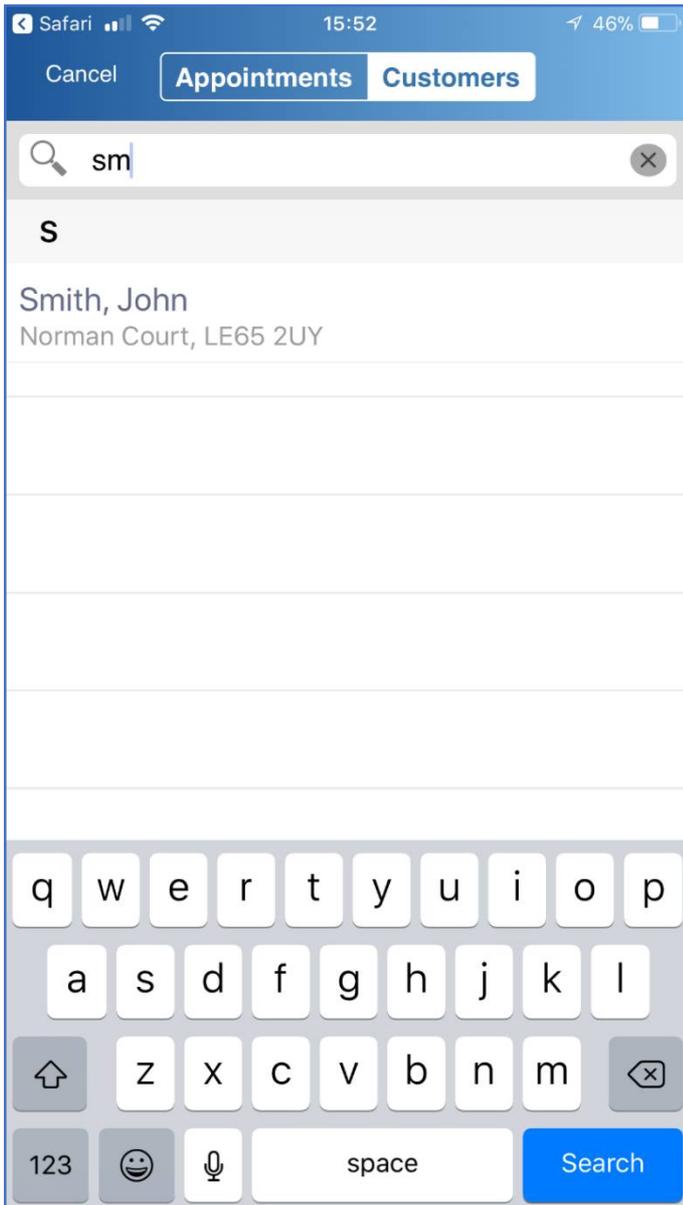
Tap each entry to view the detail as shown in page 14 contact history detail.

## Calendar App Search

From the main diary screen tap the magnifying glass icon: 

Tap either **Appointments** or **Customers** to search either of those lists. Search goes across all fields within the customer or appointment and searches as you type characters.

E.g. In customer you could type a street name, town name, part of a surname etc. In appointments you could search for a resource name, or an action, or text within the notes on an appointment.



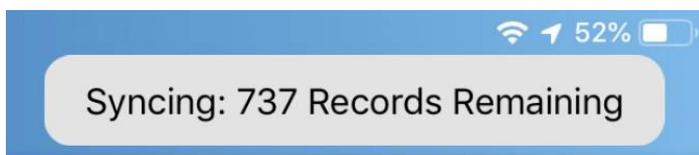
Tap on an entry to open either the customer, or the contact history.

## Calendar App Syncing

EQ Calendar App regularly synchronises data from your desktop EQ so that it is up-to-date. The updates only synchronise whilst EQ Calendar App is the active application.

If the app is left for a number of days without being used, when it is launched again it will receive all the updates that had been performed since it's last run. On a large database, over a period of time this can mean downloading multiple updates.

When opening the app allow the updates to finish. You will see the below message at the top right of the app and it will show "Finished" once it is complete.



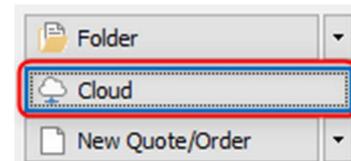
# Cloud Files

Cloud files allow you to save attachments (files and photos) in EQ and view them in the Calendar App and vice versa. There are 2 places you can attach a file:

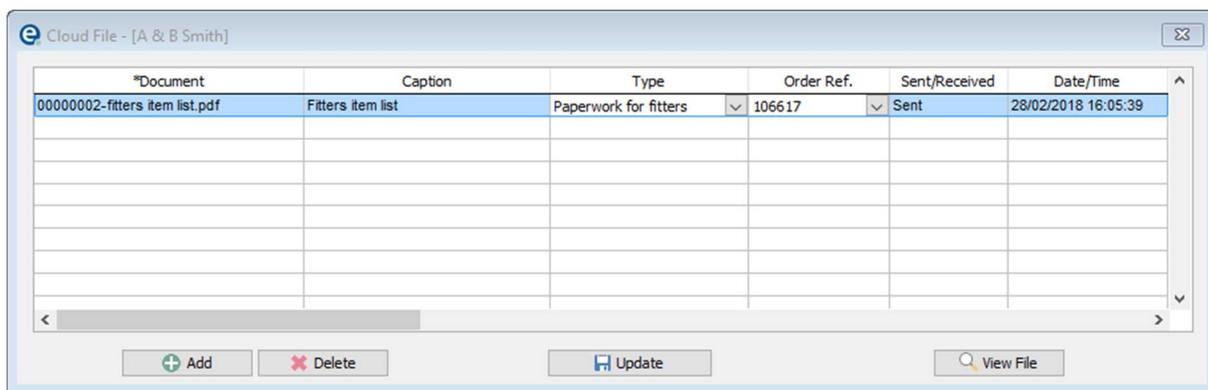
- A customer record – This is attached regardless of any order reference.
- An order – This requires a contact history entry to have an order reference selected (in EQ). This is used when the file or photo is for the specific order only.

## EQ Customer screen

To attach a new file, or view all attached files, click the **Cloud** button when you have highlighted a relevant customer.



A new dialogue opens and show any files currently attached. In the example below a PDF of the fitter's item list has been attached:



Click **View File** to open an existing file directly. Also note the files are stored inside your customer folder, in a sub-folder for Cloud Files.

Click **Add** to open a browse window to add a new file. It will default to showing your EQ customer folder, but you can attach a file from any location on your computer.

Once you have selected the file enter a name in the **Caption** box and select the **Type** from the drop down. (If you need to add document types see Cloud Configuration)

If you do not specify an order ref this file will be shown in the Calendar App customer screen only. If you do select an order ref then this file will be shown in the Calendar App customer screen **and** on a contact history entry that has had an order ref linked to it. You can link an order to a contact history entry in EQ by using this drop down box within a contact history entry:

**New Appointment/Call**

**A & B Smith**

Date: 12/03/2018 | Time: 09:00 | Duration: 3 Hours | Days: [ ]

Lock Appointment

**Quote/Order Ref.**: 121244

Action: Measure/Survey | Resource: Alan Peters | Reason: Kitchen | Location: Customer Address

Comments: [ ]

### **Calendar App Customer Screen**

The screen below shows a customer detail, with a PDF of a linked file at the bottom.

Tap to view in the native viewer app (varies depending on your device and which applications you have installed).

Once the phone/tablet displays the PDF file you can use the action button to send it to another app, view message, print etc.

EE 15:41 71%

< A & B Smith

Website

---

Customer Type Trade Account

---

Sales Person Ashlene Brown

---

Source of Lead Existing Customer

---

Showroom Loughborough

---

Type

---

Contracts Type

---

**FITTERS ITEM LIST.PDF**  
Paperwork for fitters  
Fitters item list

Add File