EQ CONTRACTS MODULE

FULL MANUAL

OVERVIEW

EQ Contracts presents an interface specifically designed to help the process of quoting across large developments. The Sites module contains development sites that are saved against developers (builders). Within a site multiple house types contain your master quotes which can price across up to 8 price groups in a furniture catalogue. Pricing and margins are controlled solely for your contract sites. Once sold the Call Off feature allows for quick calling off of orders for set plots (and can be done in fixes/phases).

The EQ Contracts module is an additional module which requires EQ Professional and additional purchase.
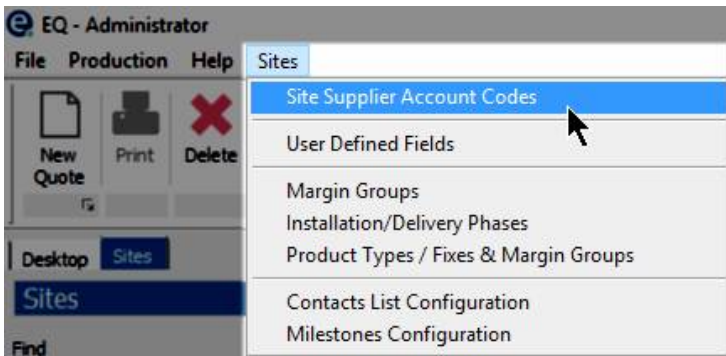
Contents

Global Settings

These settings are best setup before beginning use of the contracts module but can be modified at any time. They apply to all contract sites. Once a setting has been changed here, you will need to exit EQ and re-open in order to see the changes.

Open the **Sites** screen

Click the Sites item on the main menu bar to access these settings:

Site Supplier Account Codes (This is a site specific account code for use when dealing with selected suppliers only for this development site).

User Defined Fields

There is a possibility to record up to 24 fields to collect additional information not already captured on the Sites General tab. The data is saved against each site and each house type.

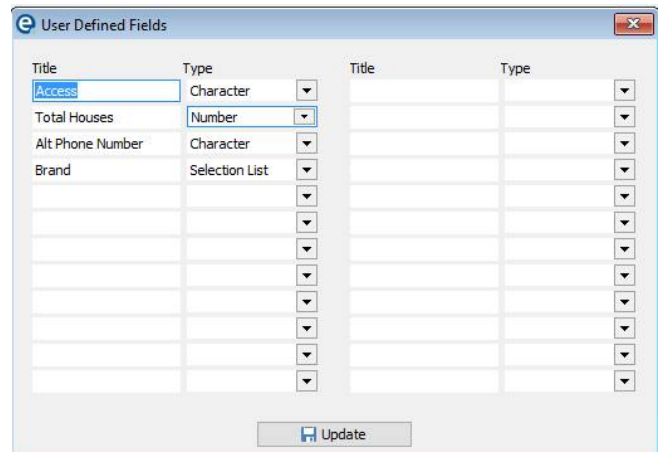Type any title you wish into each box (the "question") and select from **Type**:

**Character** – to enter data as text

Number – to enter data as a number with 2 decimal places

Date – to enter data formatted as a date

Selection List – to create a list where 1 answer can be selected from. (The content of the list is defined on the Info tab of any site or house type using the "edit popup contents" icon).

These question prompts show on each site and each house type on the Info tab as per the example below:

Margin Groups

Margin groups are used to define which type and category of products attract which margin. A default margin is set globally here but can be changed for each site and/or house type.

Click **Add** to enter as many margin groups with your chosen title and any default margin. Click **Update** to save your work and close.

Installation/Delivery Phases

Phases are used to group products which can then be called off at different times throughout the life of the order, e.g. first fix for fitted furniture items, second fix for built in appliances.

Click **Add** to add as many names for phases/fixes as you wish. Click **Update** to save your work and close.

Product Types / Fixes & Margin Groups

This menu option brings together the above 2 items and allows you to setup both the margin group and phases against each product type and category. Every product in EQ's data (and your "My Catalogue" products) has a type and category.
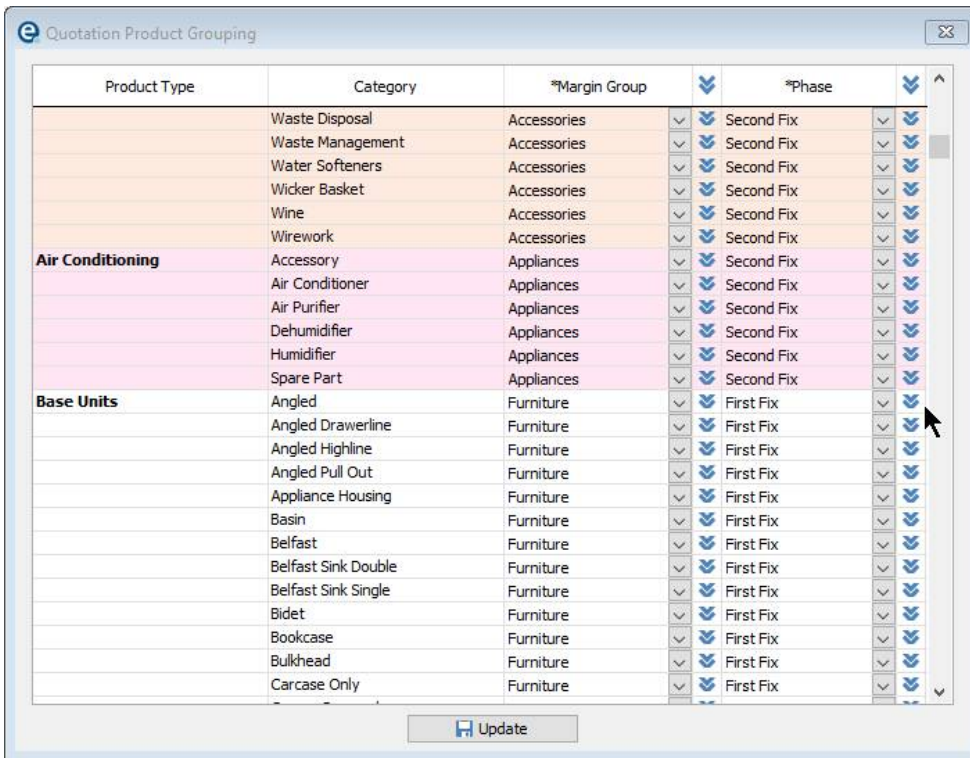

Go down the list of product types and assign both a margin group and a phase, picking from the drop down boxes. These phase/fix settings will be used by default for every new site, but you will be able to specify site settings later too.

To help quickly complete all settings for every category you can **double-click on the double down arrow** and it will copy the selected item to all categories in the current product type.

Contacts List Configuration

Enter in job titles which you will use to store contact data against each of your sites.
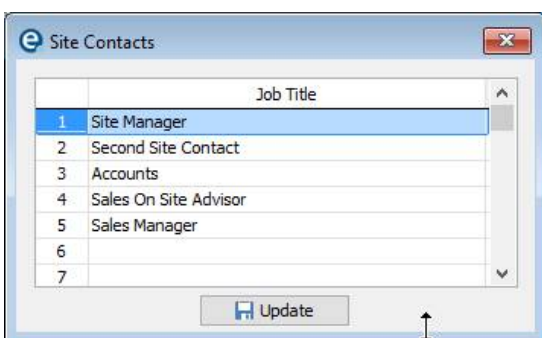
These will be entered against each **Site**, under the **Contacts** button with specific contact details:
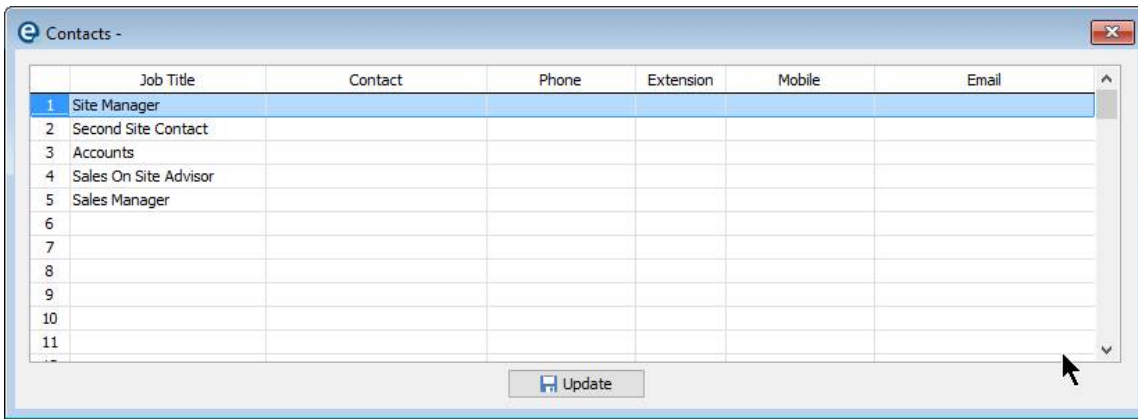
Milestones Configuration

Enter in milestone titles which you wish to track across all of your sites. Milestones hold a target date and an actual date achieved. This is a global list of milestones which will apply to all sites. Note that these milestones are **not** related to the other system milestones which show in Projects > Sales Orders in the rest of EQ.

These will be entered under each Site, under the **Milestones** button with specific target and actual dates that each milestone has been achieved at that site.

Default Master Quotation Options

The below options are saved in Tools > Customise > Optional Modules > Contracts v2
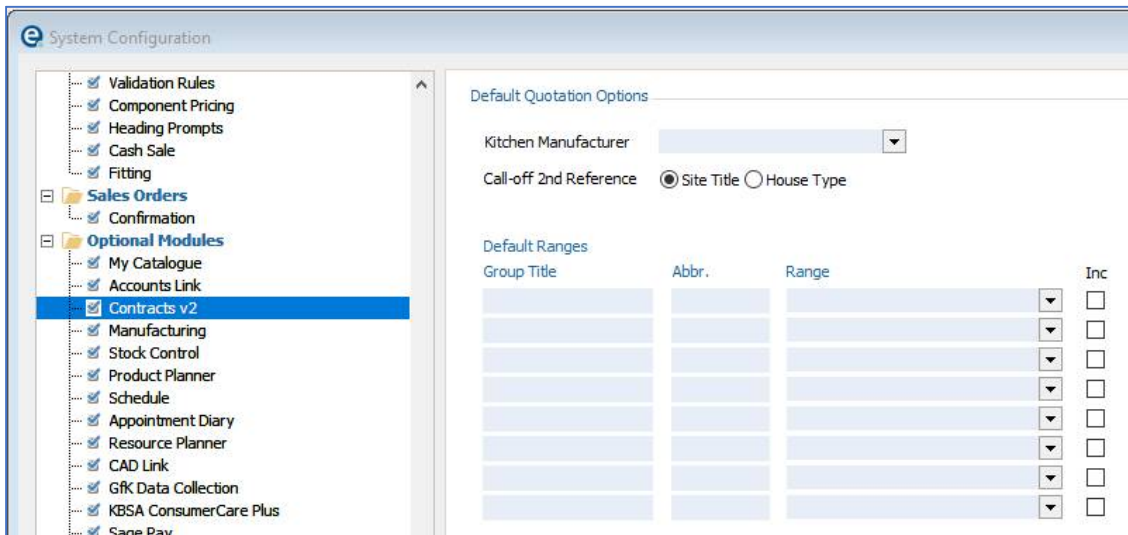
**Kitchen Manufacturer** – Select the fitted furniture catalogue to use as a default. This can be changed for each site.

Call-off 2nd Reference – When a master quote is called off to become a sales order either the site name or house type name will be automatically completed in the order 2nd Ref box.

Default Ranges – Enter up to 8 price groups to use as defaults. These can be edited for each site as they are added.

Create a New Site

Select the **Contract Sites** button at the top of the screen in the toolbar:
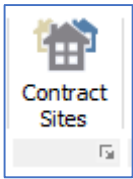
The Contract Sites screen will appear. This will display a list of all contract sites that are in your module (at any stage in the quoting/ordering process)
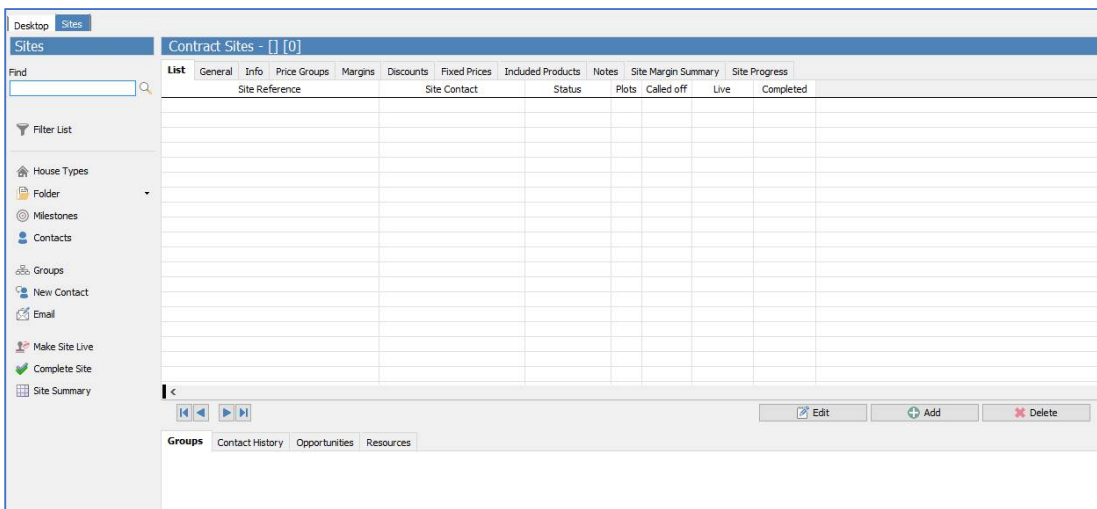
To create a new Contract Site, select the **Add** button in the centre of the screen. The **General** tab will appear ready for completion.

General Tab

<u>Developer Details</u>

- Developer – this is the organization/company that is carrying out the building works. Enter the first few letters of the Developer name, to select the developer from the Customer List Database. The three-dotted (ellipses) button can be used to open the customer screen (and opens on the selected record).
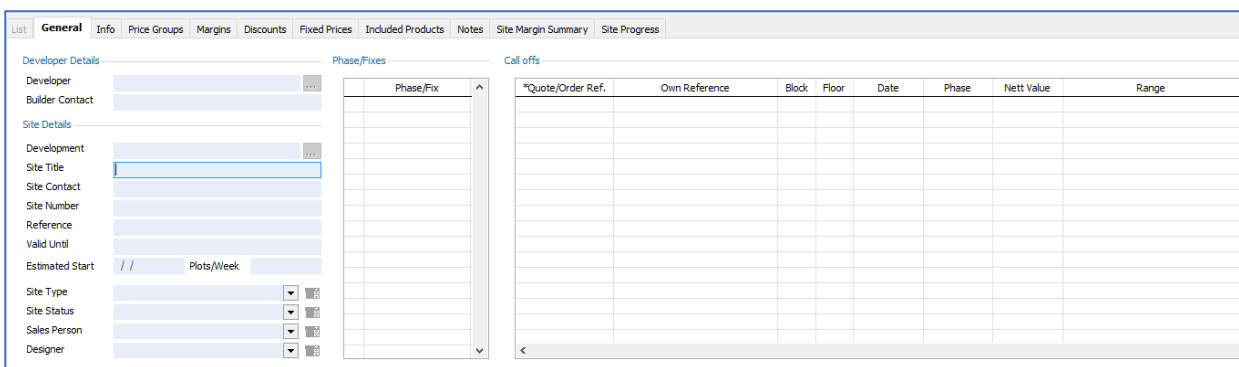- Builder Contact – Free Text field for the name of the contact at the developer organisation.

<u>Site Details</u>

- Development – this is the name if the development site. Enter the first few letters to select it from the Customer List Database. The three-dotted (ellipses) button can be used to open the customer screen (and opens on the selected record).
- Site Title e.g. Swanfields – This is the description of the site where all the houses are. It is a mandatory field.
- Site Contact – This is a free text field to hold the name of a contact at the site.
- Site Number – Free text field to hold the site number.
- Reference – Free text field to hold a reference.
- Valid Until
- Estimated Start
- Plots/Week
- Site Type – select from the drop-down e.g. New Build (Further classifications can be added via the Edit Pop-Up Contents)
- Site Status e.g. Prospect
- Sales Person
- Designer

<u>Phase/Fixes</u>

This determines which phases/fixes are relevant to this contract site. They should be configured beforehand via the Menu Bar and selecting **Sites > Installation/Delivery Phases.**

Select the **Add** button to add all the required Phase/Fixes and then select Update.
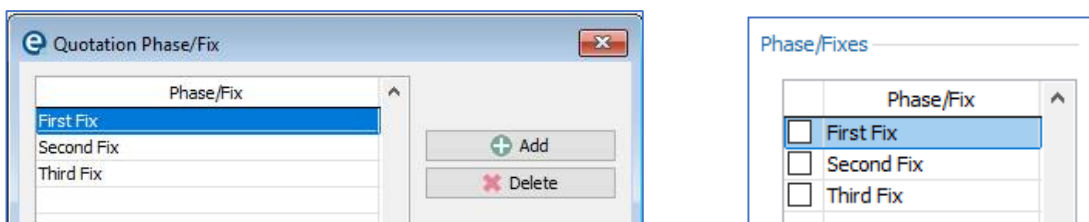
In order to see the Phase/Fix options on the General Tab, you may need to close out of the Contracts screen and then go back to it again.

Place checks in the boxes to indicate which **Phases/Fixes** apply to this Contract Site.

<u>Call Offs</u>

This Grid displays those Quote/Order References and their details that have been called off during the lifetime of this site. It will be empty when adding new sites.

Info Tab

This tab can be used to record Additional Site Information. The User Defined fields, first need configuring, in order to be add details to this screen. (See the setup section above).

To use the fields, select the **Edit** button, add the details and then select the **Update** button.

Notes Tab

The Notes tab allows you to add free text notes to the Contract Site Record.

To add a note, select the **Edit** button and then select the **Add Note** button. The Add Note window will appear ready for you to add the note details.

Add the note and then select the **Update** button.

The Notes will then appear with a date and time stamp along with the details of the person who added the note.
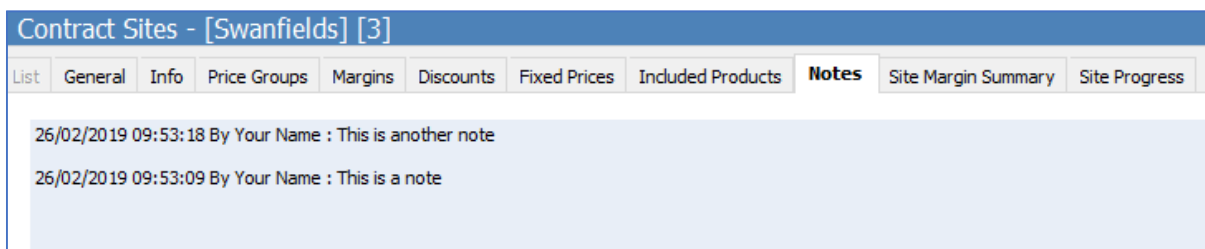
Select the **Update** button to save the details.

Fixes Tab

These fixes will be inherited from the main settings in the menu bar > **Sites > Installation/Delivery Phases**. You can make changes here that apply only to this site. On the left pick a new type/category combination or on the left use the **+ Add** button to set a fix for a single product.

Resources (Lower Tab)

The Resources tab is used to store contacts that are working on this site.

Click the + to **Add** a new record, then pick from the list of your EQ resources in the Ref column. (This resources list is common across all of EQ).

The resource, resource type and contact numbers are pulled through from the resources record. You can then enter additional comments that relate to this site only.

Buttons on the Site Screen

Filter List

Use this button to filter the list of matching site titles shown on the List tab. You can filter by the sales person on the site, the site status and the site type.

House Types

This is the second main screen of the contracts module and shows all the house types for the selected site. Within house types you will setup house type settings and create master quotes. See page 18 onwards.

Folder

This opens the customer folder which is for the site. This is the same folder as the customer that is linked to the development site on the General tab.

Groups

Can be used to create, view and edit customer groups related to this contract site. This links with the customer records assigned to the development site on the General tab. (They are the same groups as defined in the customer screen and used in EQ for retail).

New Contact

Can be used to record new communication entries against this contract site. The communication entries are saved in the lower tab of this screen and are also stored against the customer that is against this development site on the General tab.

Opportunities

Can be used to assign opportunity to the development. The same opportunities are stored in the lower tab of this screen and are also stored against the customer that is against this development site on the General tab.

Email

Can be used to send an email with the default "To" address being the customer record connected to this development site. The same emails are stored in the lower tab of this screen and are also stored against the customer that is against this development site on the General tab.

Price Groups Setup

Open Sites > click on a site name > click the **Price Groups** tab.

A contracts quote can price in multiple ranges on screen at once. When using a fitted furniture catalogue you can have up to 8 price group columns shown.

This screen must be setup before beginning any contract quoting. Select the **Edit** button to add/amend details to this screen.

Select the manufacturer (if working with fitted furniture catalogues).

Check "Single Range" only if master quote does not need to show any other price groups. When ticked the below 8 blank rows will disappear.

Manufacturer – select from the drop-down button.

Price Group Title – free text field for the title required to represent the range e.g. Price Group A or Gold, Bronze, Silver etc.

Abbr. – this is an abbreviation to help identify the range and this is what appears on the Quotation screen.

Range – Use the drop-down to select a range for that price group. As you can have many ranges in one price group, it is irrelevant what range you choose. Just select 1 range per price group to work with.

Price Group – this is the price group that the Range selected belongs to. You will need to select Update for this information to populate.

Include – this check box denotes whether this Price Group should be included on the Master Quote i.e. do you want this column on your quote. Check the include box for all that apply.

Notes Button – This can be used to create notes for the Price Group e.g. describing the features of the selected range. This will print off on the Site Summary document.

Repeat the process for adding Price Group Titles for up to 8 Ranges.

Select **Update** to save the details.

The Structure for the Master Quote is now complete.

NOTE: You are not able to mix ranges or furniture manufacturer in the same master quote in the contracts module.

Pricing: Margins

Open Sites > click on a site name > click the **Pricing tab** > click the **Margins** sub-tab.
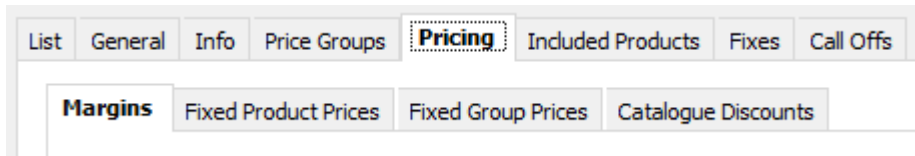
It is normal to set a margin against the Contract Site (and potentially amend the margins during the quoting process).

Use System (Retail) Default Margins – check this field to use the Retail Default Margins instead (the same ones used for retail pricing in EQ's supplier screen).
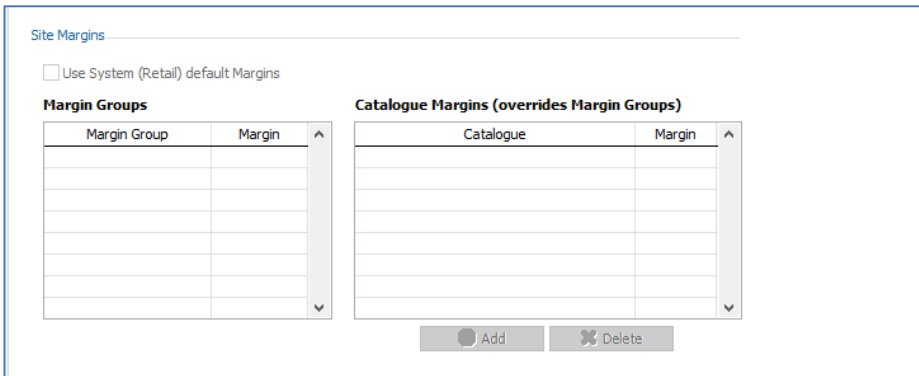
If you have completed the default margin groups setup (above, page 5) then this screen will initially show the default values. Either accept the default values or press Edit and then overtype the margin percentage values.

Catalogue Margins (overrides Margin Groups)

This can be used to override the Margin Groups – This may be because you have a specific catalogue margin you want to apply.

Remember, that you are in just this one Contract Site, so if the Catalogue Margins must be applied for further sites, they will need setting up each time.

Catalogue Margins (overrides Margin Groups)

Catalogue	Margin	
EQ Kitchens	25.00	

[⊕ Add] [✖ Delete]

To add a Catalogue Margin, select **Edit** then select **Add**.

Select the Catalogue from the drop-down and then enter the Margin.

Select **Update** when complete.

Pricing: Fixed Product Prices

Open Sites > click on a site name > click the **Pricing tab** > click the **Fixed Product Prices** sub-tab.

Here you can apply fixed cost and selling prices and fixed group products cost and selling prices for this particular Contract Site.

Information entered here will override the site margin and site catalogue specific margin.

To add a Fixed Cost and Sell Price for a product, select the **Add** button. This will display the Locate Product screen. Search for the item required and select the **Add Product** button. The item will now appear in the Grid for the Fixed Cost and Selling prices.

Add in the Cost and/or Sell price details.

Fixed cost and selling prices

Code	Description	Cost	Sell	
GSN58AW30G	Serie 6 191 x 70cm NoFrost Upright Freezer - White	100.00	200.00	

⊕ Add   ✖ Delete

Repeat the process for any further items.

NOTE: If the Cost and/or Sell fields are left empty, EQ will revert to the normal cost or sell price details.

Note on Pricing Hierarchy:

The more specific a price setting is, the further up the hierarchy it is and will override all previous price settings. For example these product prices override any catalogue margins, which override any global margins.

Pricing: Fixed Group Prices

Open Sites > click on a site name > click the **Pricing tab** > click the **Fixed Group Prices** sub-tab.

This can be used to add in products to the master quote that contain a fixed price for a set house type and margin group. For example in the margin group for installation you could set a fixed price for a fitting charge. This will be different to any other product on the master quote because it's price will never be calculated, therefore it is a fixed price to this margin group.

For this feature to work you need a product in your furniture catalogue that will be used to "hold" the price. This product code is setup in the **Sites** menu > **Margin Groups**. This example product below is FITTING:

Ref.	Group	Default Margin	Fixed Group Prices Link Code (comma separated)
1	Furniture	65.00	
2	Appliances	30.00	
3	Accessories	65.00	
4	Fitting	50.00	FITTING
7	Sinks	40.00	
8	Tiling	88.00	

The example below shows how we want to price the fitting charge. There are 2 price groups and 6 house types which will be pre-populated on the screen.

Select the margin group from the drop down list (e.g. Fitting) and enter the **cost** and **sell** prices in pounds next to each entry.

The tick box **Use Margin Group Margin** allows you to enter a cost price only, then when you click into the Sell box the sell price is calculated using the margin already set for this margin group (as per page 13).

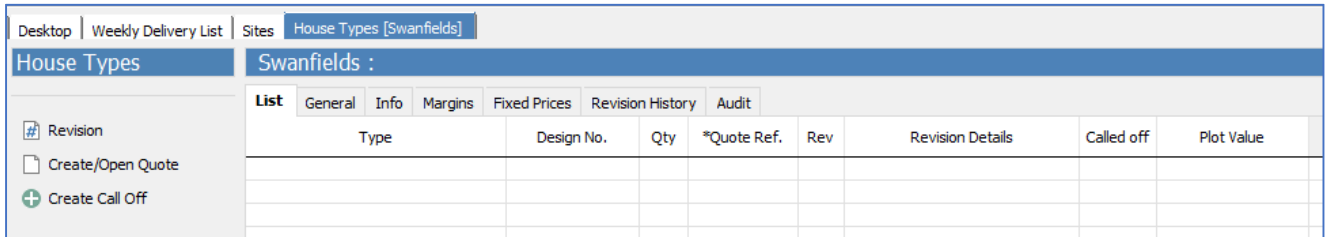| House Type / Price Group	Price Group	Cost	Sell
Appleton / Group 1	1	100.00	200.00
Appleton / Group 2	2	150.00	300.00
Bardwell / Group 1	1	125.00	250.00
Bardwell / Group 2	2	175.00	350.00
Cirencester / Group 1	1	202.00	404.00
Cirencester / Group 2	2	252.00	504.00
The Ashby / Group 1	1	198.00	396.00
The Ashby / Group 2	2	248.00	496.00
Commodore / Group 1	1	200.00	400.00
Commodore / Group 2	2	240.00	480.00
Shuttington / Group 1	1	300.00	600.00

When you use this product code on the master quotes the set price for the relevant house type will be used.

Pricing: Catalogue Discounts

Open Sites > click on a site name > click the **Pricing tab** > click the **Catalogue Discounts** sub-tab.

This allows you to apply a discount for the manufacturer catalogue for this Contract Site specifically.

To apply a discount, select the **Edit** button, then **Add.** You can then select the Manufacturer from the drop-down and then apply the Trade Discount or Retail Discount percentage. (Depending on the catalogue type usually only one discount % column will be available to enter).

NOTE: This applies to the Default Supplier for the selected manufacturer.

Included Products

Open Sites > click on a site name > click the **Included Products tab**

Products listed on this screen can be selected to automatically appear on any quote created for this contract site, therefore saving the user time in locating and adding products manually. This is useful for products that are always compulsory.

The user will still be able to edit the quote to remove any products that are not applicable for a certain house type.

Group Name	Code	Description	Qty	
Gold	BPK742320M	SenseCook Pyrolytic Oven - Stainless Steel	1.00	
Gold	HC452021EB	36cm CrystalLine Integrated Electric Hob With Ceramic Glass -	1.00	
Platinum	BPK744L21M	Side Opening SenseCook Pyrolytic Oven - Stainless Steel	1.00	
Platinum	ML452722	LED Self Adhesive Bespoke 1m + 6W Driver - Accessory	1.00	

To add included products, select the **Edit** button, then **Add**. The Locate Product screen will appear for you to select the products required.

Once the products have been located and are in the Basket select the **Add Products** button and the Included Products will then be populated with the products just selected.

The products will appear (as in the grid above) and you can enter a quantity if not 1.

Group Name is used to group the products together. This group name is used to select appropriate groups of products when beginning a new master quotation. You may want to use groups for certain product types or for different price bands of products (e.g. gold, silver, bronze). See the topic Creating a Master Quote for more information.

Creating a House Type

House types exist within each Site and have a master quote saved against each.

To begin click a Site name in the list view.

To add a house type, select the **House Type** button at the left of the screen. The House Types [*Name of Site*] tab will appear.

Select the **Add** Button. The General Tab will be displayed:
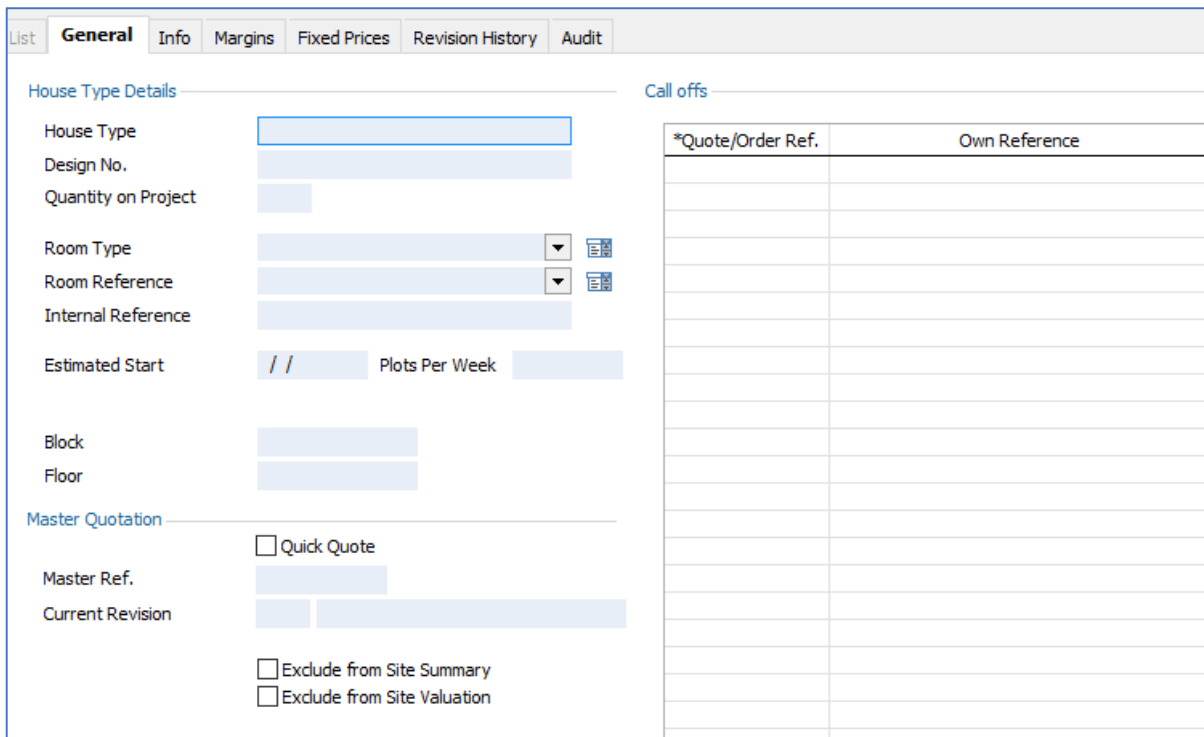
House Type Details

House Type – Free Text field for the House Type Name

Design No. – Enter the number if it relates to a CAD design (useful for organization)

Quantity on Project – Number of these house types on this project (Can be amended later).

Room Type – select from the drop-down list e.g. Kitchen. The Edit pop-up contents can be used to create further Room Types.

Room Reference – select from the drop-down list e.g. Kitchen. The Edit pop-up contents can be used to create further room references.

Internal Reference – For any additional reference needed

Estimated Start – Enter an estimated date

Plots Per Week – Enter an estimated rate of plots per week to be called off

Block – For apartments only

Floor – For apartments only

Master Quotation

Quick Quote – Only check if a quick quote is allowed for this house type (This excludes any fitted furniture catalogue being used).

Master Ref – Leave this empty, it will be automatically completed once you begin a master quotation

Current Revision – It will be automatically completed as you edit the master quotation

Exclude from Site Summary – check to exclude from the site summary print out (may be used if you have saved some alternatives that do not need to be used in the project)

Exclude from Site Valuation – check to exclude from the site valuation print out (may be used if you have saved some alternatives that do not need to be used in the project)

Select the Update button when all details have been added.

House Types: Info Tab

This displays the same User Defined fields seen against the Contract Sites > Info tab. (They are 24 customised fields that you can use to capture and store any additional information not stored elsewhere).

When you add a house type any data already entered against the site will be copied here to the house type.

You can use the **Edit** button to change any of these details and the differences will only be stored against this house type.

House Types: Pricing Tab

Open **Sites** > click a Site > click **House Types** button > click the **Pricing** tab.

All pricing rules on a house type will follow the pricing that is setup against the Site.

Fixed Product Prices

You have the ability to override fixed cost and sell prices specifically for this house type on this tab.

Click **+ Add** to open the product Locator screen to select one or more products. Once you have added the products and they show in the grid you can overtype the desired Cost and Sell prices.

Any empty prices here mean the product will be priced according to the pricing hierarchy from the contract Site. The hierarchy runs from most general at the bottom through to most specific at the top.

Creating a Master Quotation

A master quote is created on each House Type.
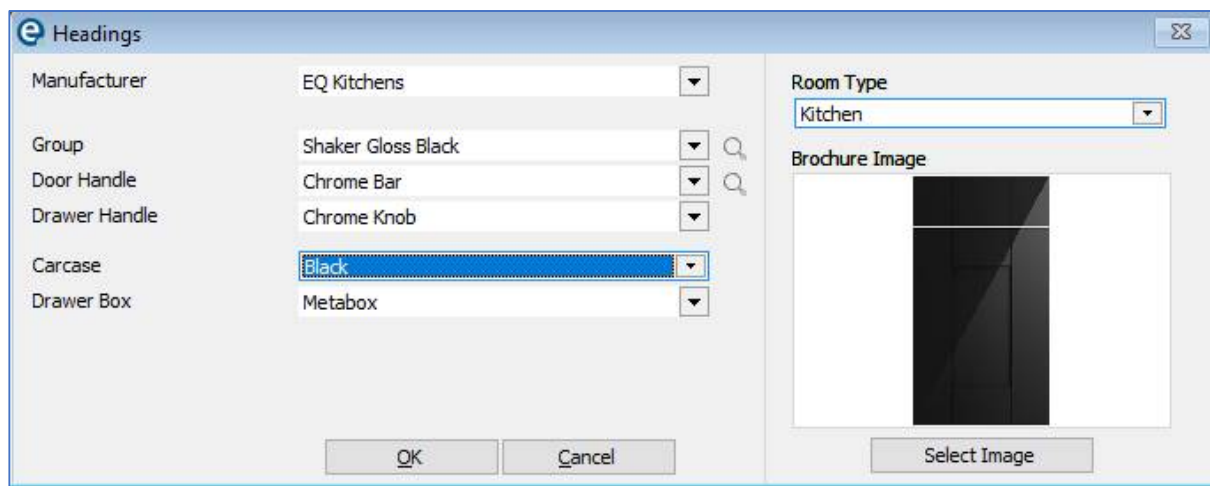
Open **Sites** > click a Site > click the **House Types** button > click a House Type title.

At the top left, click the **Create/Open Quote** button.
(When no quote exists, it begins to create one, otherwise this opens the master quote).

If the house type does not allow for Quick Quotes, EQ will display the Headings window as it assumes a furniture quote, otherwise you will be ready at a new blank quick quote.

Complete the Headings window with the correct Manufacturer. The other fields are irrelevant really – but you are just filling them out to get past this screen. Click OK.

The Quotation screen will appear – and if selected, any products that were added as Included Items by default.

The Quotation Reference will contain underscores at the beginning and end– this helps identify it as the Master Quote e.g. [_1181_/0].

The Master Quote at this stage can have products added to it or products imported from a CAD file.

Products are added using the **Add** button in the usual way.

NOTE: When Adding products, the price displayed in the Locate Product screen is not always relevant as the price will have been determined by the set up against the site and the house type.
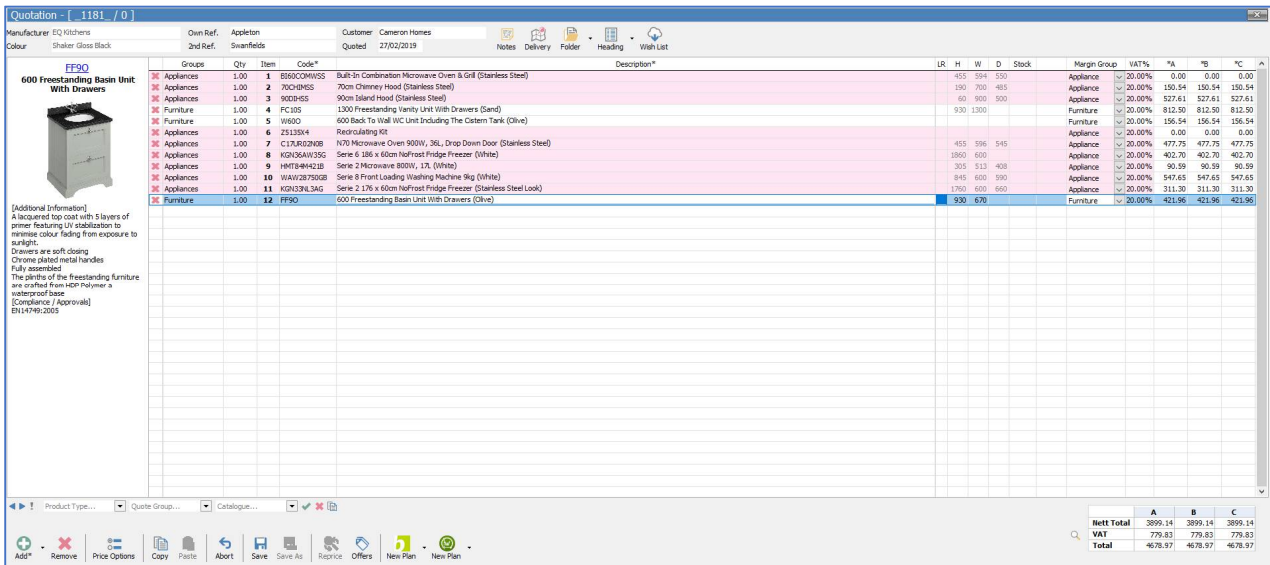
The quote will display 1 column per Price Groups set up as well as Nett Total, VAT and Total per price group at the bottom right of the screen.

Phases and **Margins** will also show on the quote. If any cells are empty you can apply using the drop-down menu, or make changes from the default which will be saved against this quote.

Items on the quote can also be renumbered in the normal way.

Furniture Product Availability

Some prices may be the same in each price group whereas some will differ.

If a product does not have a price in that group, the cell will display in Red. Items can be added manually to replace an item in that price group that may not be available in another price group.

To exclude an item from a price group you can right-click over the Price in the Group and then select Exclude from Price Group.
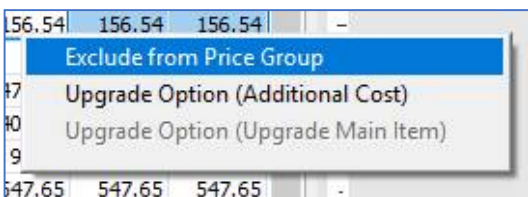
NOTE: You need to make sure that every quote has products available in every range.

Master Quotation Upgrade Options

By default, all products added into a quotation will be priced in every price group (depending on availability, see page 24). You can also offer 2 types of product upgrades on your master quote:

1. Upgrading a Main Item
This could be used when a basic price appliance is offered as part of the quote price but there is also a higher specification appliance. The "upgrade" item's price is excluded from the quote totals and its line price shows only the price difference.

    1. Add a main product e.g. basic oven

    2. Right-click the product code and select "Add new item as sub-item"

    3. Search and locate for the higher specification product and click Add to Quote. This product is now added directly underneath the original appliance.

    4. Right-click on one of the prices for the sub-item to see this menu:

    5. Select **Upgrade Option (Upgrade Main Item).**

The sub-items prices will now show in green:

The price will be the difference between the main item and sub-item and will not be added into the master quote total.

2. Additional Cost
The product's price is not included in the quote totals but during Call Off stage the product(s) can be selected. At this point the product is added into the called off sales order so it can be ordered as usual.

    1. Add a product that is an optional extra onto the quote as normal

    2. Right-click on one of the prices for the product and see this menu:

    3. Pick **Upgrade Option (Additional Cost).**

The prices for this product will now show in green:

The price will not be included in the master quote total. However, during call off the user can select any upgraded additional products if required.

Editing the Master Quotation

The master quote can be viewed and edited as many times as required. If you need to amend some pricing significantly, rather than editing everything manually you should instead use the **Site Margin Summary** button (see page 27) which can reprice many quotes automatically.
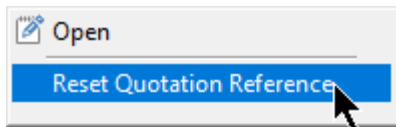
To open the master quotes again:

Open **Sites** > click a **Site** title > click **House Types** > click a title > click the **Create/Open Quote** button.

Alternatively, you can do the following from the house types list; double-click the quote ref number or right-click the quote ref number.

Resetting a Master Quotation

Only use this option if you want to completely remove the master quotation that has been already saved. Doing this will remove the master quote so you could begin a new master quote for this house type.

Open **Sites** > click a **Site** title > click **House Types** > click a title > right-click the quote ref number and select **Reset Quotation Reference**.

Next time you click the **Create/Open Quote** button a new quote will begin.

NOTE: You may see the master quote refs with _ characters within the projects > quotes list. You cannot continue editing a master quote without opening it via the contracts screen.

Site Margin Summary

Back at the Sites screen with the Site selected, click the **Site Margin Summary** button.

This displays the cost and sell prices for each price group. It also uses the quantity and multiplies the cost/margin for each house type.

Update	Quote Ref	House Type	2nd Ref.	Group	Cost	Sell	Qty	Tot.Cost	Tot.Sell	Margin%
☐	_1181_	Appleton	Swanfields	A	£ 3,917	£ 3,917	5	£ 19,585	£ 19,585	0.00
☐	_1181_	Appleton	Swanfields	B	£ 3,917	£ 3,917	5	£ 19,585	£ 19,585	0.00
☐	_1181_	Appleton	Swanfields	C	£ 3,917	£ 3,917	5	£ 19,585	£ 19,585	0.00
		Total:		A	£ 3,917	£ 3,917	5	£ 19,585	£ 19,585	0.00
		Total:		B	£ 3,917	£ 3,917	5	£ 19,585	£ 19,585	0.00
		Total:		C	£ 3,917	£ 3,917	5	£ 19,585	£ 19,585	0.00

NOTE: This replaces the Costings screen that you would otherwise use when retail pricing.

It is possible to re-price all the existing master quotes. This can be accomplished by switching back to the Site **Pricing > Margins** tab and altering the site margins against the groups. Alternatively you can adjust any of the pricing overrides under the **Pricing** tab.

Once margins have been changed go back at the **Site Margin Summary**, use the Update checkbox to select each house type/price group combination that you want to re-price. Then select the **Update Margins** button.

Select **Yes** at the System Message.

EQ will then open every quote and re-price them accordingly. (This takes a few seconds per house type).

If you re-negotiate a price at any point whilst quoting you can update the fixed prices in a similar way and then update to re-price accordingly.

Filter

The filter button at the right of the screen, allows you to focus on a particular price group:
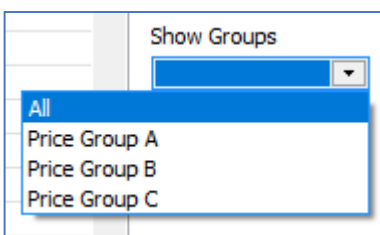
Site Summary

The Site Summary screen allows you to preview a summary of prices across all the house types and produce a printed document. It prints to A4 landscape.

On the Sites list click a site title and then click the **Site Summary** button.

Site Summary tab

This shows a grid with each house type, plot quantity and prices across each margin group with totals and grand totals. This information is for viewing only.

Configuration tab

Here you can enter text to display in the body of your printed document. You should include the description of all the choices used within the quotations. Any price group notes you setup on the site Price Groups tab will already print on the document.

You can enter Footer text to display at the bottom centre of all pages.

Logos tab

You can select 2 graphics to be used in the printed document.

Site Logo – Is used at the top left of the document after the front page.

Front Page Image – Is used to display in the centre of the front page, as a covering page graphic. The site title and reference are used at the top left, the graphic fills the remainder of the covering page.

Click the **Site Summary** printer button at the bottom of this window to see the document. You will now see a print preview of your document. Use the next page button on this toolbar to step through the pages:
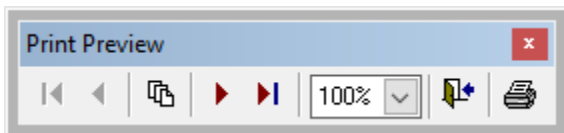
There will be 1 page per price group. Under each price group heading the price group notes you may have entered will print.
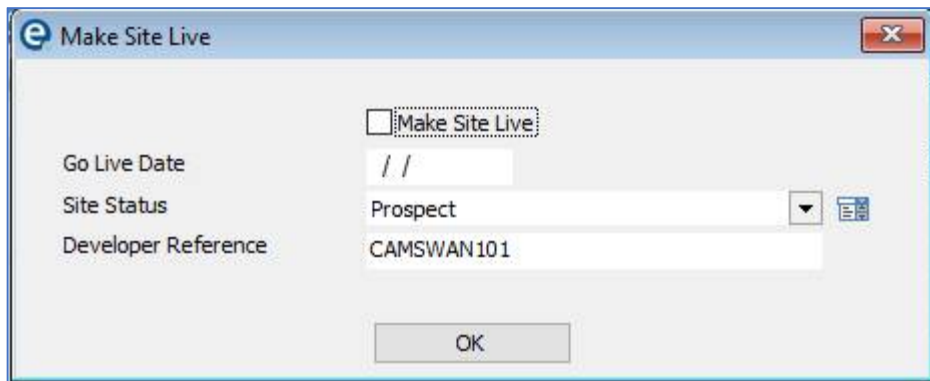
Each page will show a table with all the house types listed. Body text displays under the table.

The site summary document is built into EQ and can be customised even further with some bespoke templating. This is a chargeable service. Please email your requirements to templates.eq@compusoftgroup.com to discuss and obtain a quote.

Make the Site Live

Once a quotation has been accepted you will want to begin the process of creating call off orders and therefore need to make the site live.

Select the **Site** in the Site list and then select the **Make Site Live** button at the left of the screen. This screen will open:

Make Site Live – Check this box.

Go Live Date – Enter the date. Double-click to automatically enter the current date.

Site Status – Select Customer

Developer Reference – will pre-populate

Select **OK**

The colour on the List screen will change to indicate that the site is now a "Customer"

Note you can edit and add to the site statuses by clicking the "edit popup contents" icon next to the site status drop down box on the above screen. You can define colours for the statuses here too.

Create a Call Off

Open **Sites** > click a site title > click the **House Types** button >click a house type title.

Click the **+ Create Call Off** button which opens this screen:

Site & House Type will be pre-populated.

Plots – Select **New Plot** (as no call off currently exists. See page 31 for additional Call Offs)

Plot Reference – Enter a reference number here.

Flag Call-Off – not mandatory but could be used to flag quote as a "Contract" quote over a "Retail" quote when viewing in the Sales Quotes/Sales screen.

Lock Prices – If checked will prevent any changes from changing the price of the call-off (so that it matches the master quotation).

Edit After Call-Off – if checked will allow the called off quote to be edited.

Job/Reference No. – Enter your own job number here.

Block & Floor can be completed with apartment details if required.

Price Group – Use the drop-down to select from the previously created price groups This will dictate the range that called off quote is priced at.

Phase – Use the drop-down to select from the phases.

Include Upgrades – You can select to include the upgrade products by checking them. They will be added to the called off quote.

By default upgrades only lists products that apply to the selected phase. If you need to order products at a different time, you can tick "Show all upgrades" to view all products regardless of their phase.

Select the **Create Call Off** button.

EQ will create the call-off and display a message that it has been created successfully.

```
System Message                                    ×

    ⓘ    Call-off [EQ1182] Created Successfully


                                        [  OK  ]
```
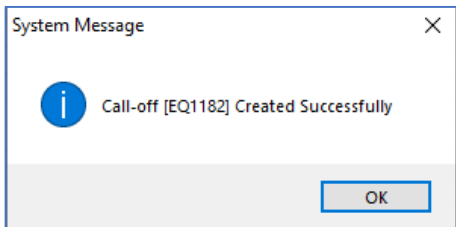
Select the **OK** button.

Your Called-Off Quote

A called off quote will now be allocated the next full quote reference number. The Own Ref and 2nd Ref are automatically completed with the site name and house type with phase called off.

This quotation will be saved and is accessible from the Projects > Quotes screen and can be viewed and edited from there (or by opening through contracts).

The first step should be to check your quote and then use the Accept button to progress it through to a sales order.

🔒 Note the padlock icon which shows the sales prices are locked. They are locked to the price set in the master quote, so any edits will not result in a change of price. You can use Price Options to unlock it if required.

Additional Call Offs

Back on the **House Types** > **General** Tab, the Master Quote and Call-Offs will display.

When you are ready to Call Off the second fix and/or another plot, can create the call-off again against the house type and plots.

As additional call offs are created the plots list is added to so that existing details will pre-populate. The plots list will become a drop down list to select from as shown here:
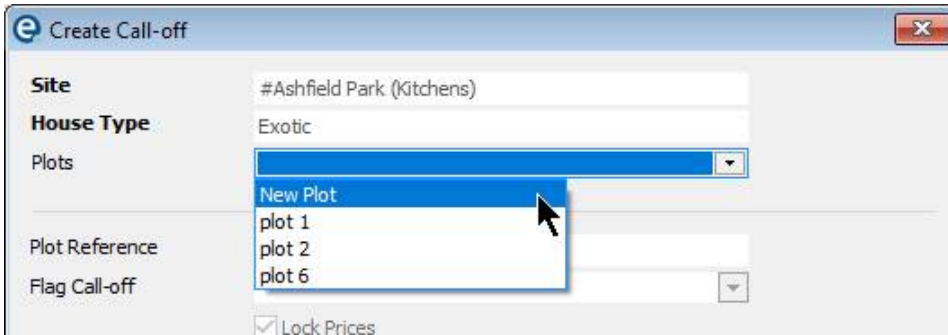
Once you have selected an existing plot these will be completed automatically:

- Plot reference with the same plot reference as previously used
- Price Group with the one previously used

The phases list will show the order number that existing phases have been called off, so the user should only select from the remaining phases. In the example below the first fix has been placed on an order already, so the user knows it is ready for second fix.
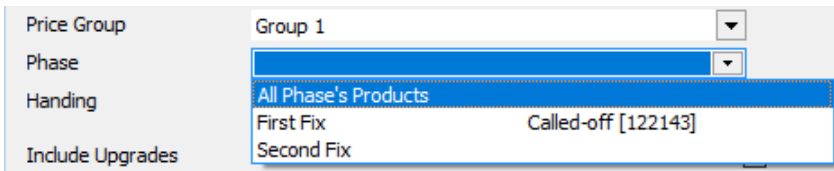
As you create Call Offs the list of call offs will be populated in the Call Offs tabs on the Site and House Type screens so you can follow the progress.

You can **right-click** the quote/order ref to open it or shortcut to the costings screen for that quote/job. Called off orders can also be edited directly from the projects screens in EQ now.

After Call Off

Usual process should be followed in EQ using the **Projects > Sales Orders** screen to make any amendments, print individual order paperwork, and place purchase orders.

Please refer to the EQ help material for further instruction at:
http://eq.compusoftgroup.com/documents/help