

COMPUTER

EQ

EQ Quick Set Up Guide

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Training and Support

Training

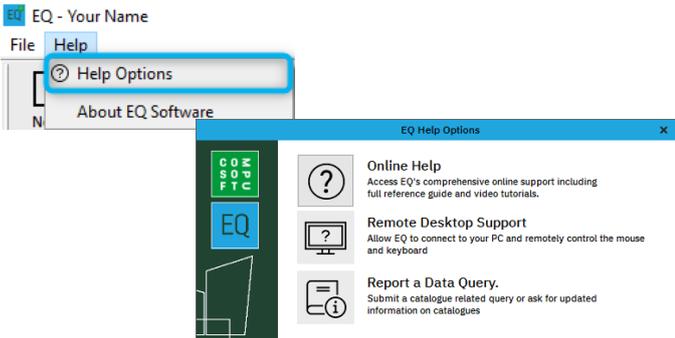
In order to gain the most benefit from your investment and utilise EQ to its full potential, we offer a variety of training courses to suit all users and systems.

Details of our standard courses can be found at <https://www.compusoftgroup.com/training/>.

Alternatively, please call us on 0845 6031370 or email training.eq@compusoftgroup.com and we will be pleased to talk through your options.

Accessing Support

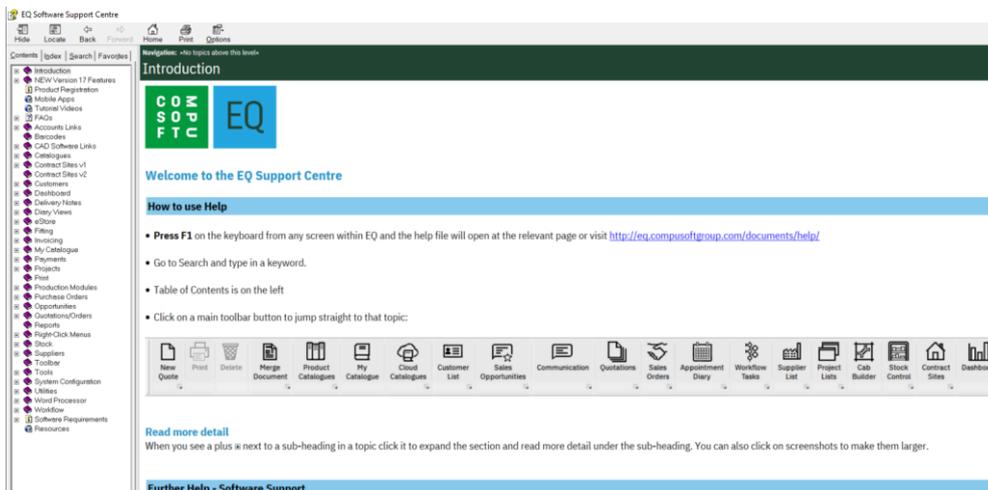
1. Click Help > Help Options on the top menu bar for the following options:



2. Alternatively, click Help > About EQ Software for Contact Information:



3. Press the F1 key on your Keyboard for context-sensitive help from anywhere within EQ:

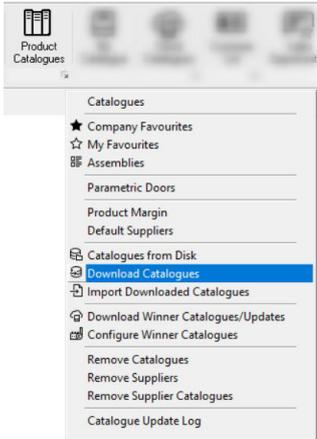


Loading Supplier Catalogues

You can download catalogues from our server so that you have the most up-to-date catalogues.

Part 1 - Download Catalogues

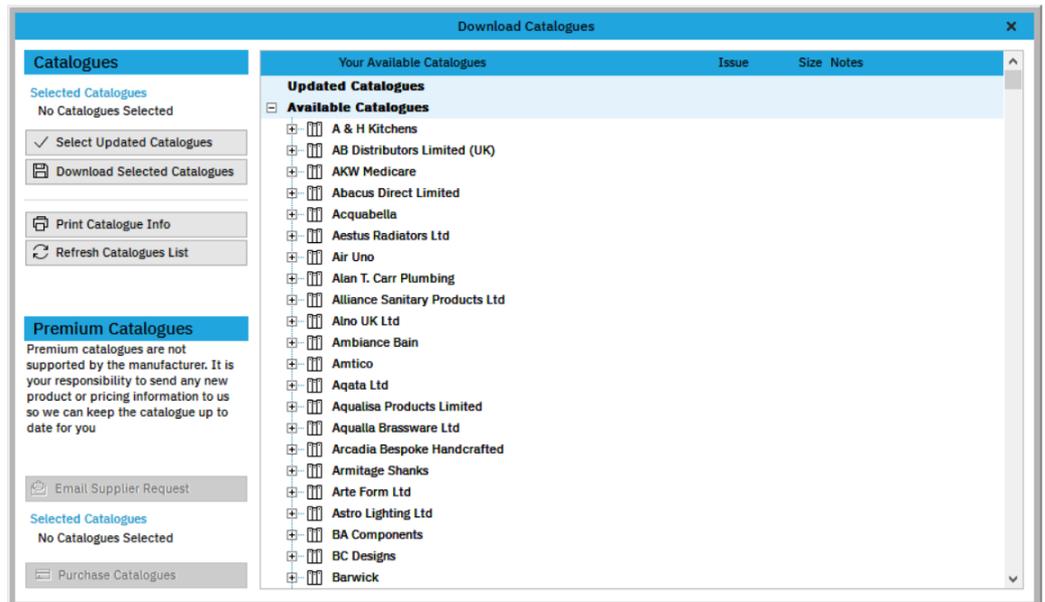
From the main screen click the drop-down arrow under **Product Catalogues** and select **Download Catalogues**.



Note: If you are prompted for a registration key (displayed as # signs), please call 01827 839259 and speak to software support. Enter the key provided and click **Update Settings**.

All the suppliers that are available to you, on general release, are listed alphabetically.

Premium Suppliers are listed separately underneath this list.



1. Click the + next to a supplier's name to show the catalogues they have available
2. Put an X next to each brand of catalogue you want to load.
Go down the list of suppliers and pick the ones you need
3. Click **Download Selected Catalogues** to start the download.
You can continue to use EQ at the same time until the catalogues are downloaded.

EQ Net will download catalogues in the background and will inform you with a popup notification as they are downloaded.

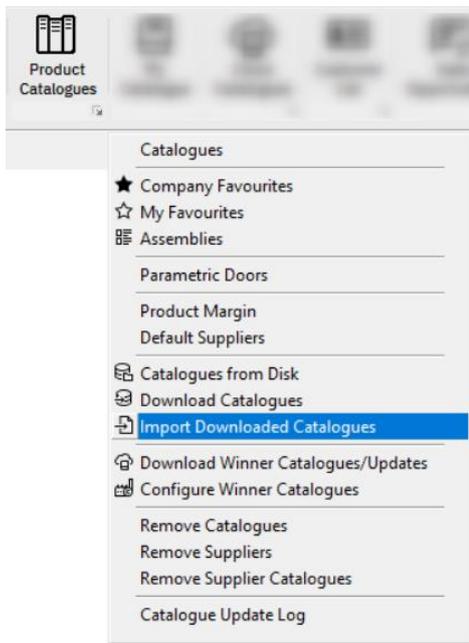
Hints & Tips



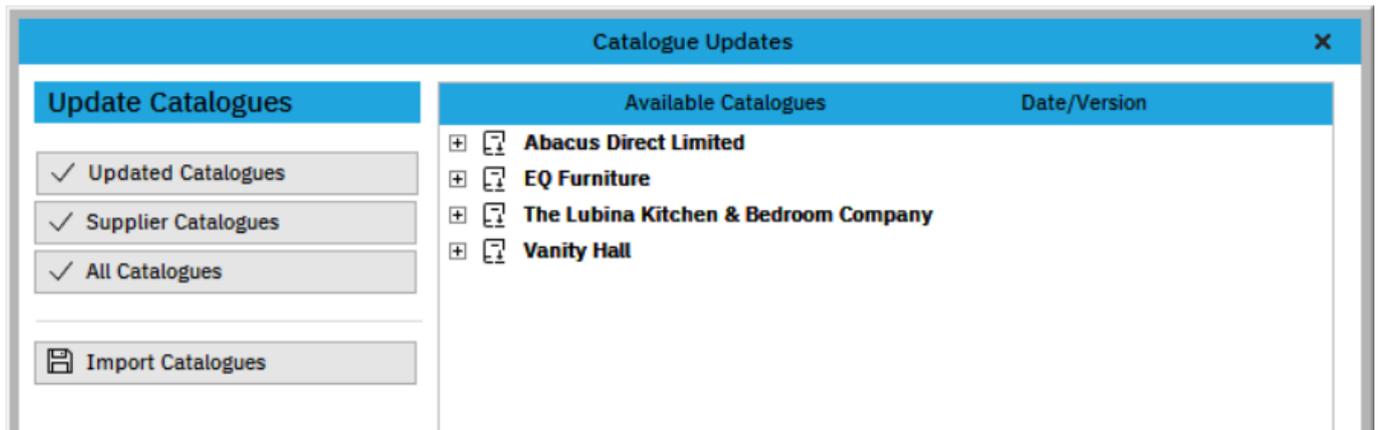
Only download a small selection of catalogues from your main suppliers

Part 2 – Import Catalogues

Click on the same drop-down arrow as you did on Part 1, but this time select **Import Downloaded Catalogues**.



This list shows only the catalogues recently downloaded.



Click **All Catalogues**. Click **Import Catalogues** to begin loading.

Please wait while this completes. **DO NOT** interrupt the procedure as it will corrupt your data. When completed, you will be presented with a system message asking you to close and re-open EQ

Configuring Catalogues

IMPORTANT

Once you have imported your catalogues, you **MUST** configure them with any discounts you receive from your **Suppliers**, and the margins you wish to make. These are default settings but can be overridden in other parts of the system.



To configure your catalogues, click the **Supplier List** icon on your top toolbar, choose a supplier and click the **Catalogues** button on the left.

Suppliers		Supplier Details : [J & J Ormerod Plc - 55]				
Find	List	General	Account Details	Contact Numbers	General Notes	Info
Supplier	*Supplier Name	Phone	Fax	Website		
	Blackheath Products Ltd	0121 5614245	0800 634 0113	www.blackheathproducts.co.uk		
	CDA	01949 862010	01949 862001	www.cda.eu		
	Chippendale Kitchens	01405 743333	01405 743330	www.chippendalekitchens.co.uk		
	Claygate Distribution Ltd	01622 833633	01622 832419	www.claygate.co.uk		
	Crosswater Holdings Limited	0345 873 8840	0345 873 8841	www.crosswater.co.uk		
	Davroc Ltd	01992 441 672	01992 708 301	www.davroc.co.uk		
	East Coast Fittings Limited	01664 424 288	01664 424 243	www.ecf.co		
	EQ Furniture	0845 6031370	0845 280 5002	www.eqsoftware.net		
	EQ Generic Furniture					
	EQ Innoplus Generic Bathrooms					
	HIB Ltd	0208 441 0352	0208 441 0219	www.hib.co.uk		
	J & J Ormerod Plc	01706 877877	01706 879827	www.jjoplc.com		
	J & J Ormerod Plc (Bathrooms)	01706 877877	01706 879827	www.jjoplc.com		
	Keuco UK	01442 865 220	01442 865 260	www.keuco.co.uk		
	Leicht	49-7171-402-0	49-7171-402-3C	www.leicht.com		
	Miscellaneous Products					
	Neff - G7A					

Here you will be able to see a list of all the catalogues you have downloaded for that supplier.

Supplier Catalogues - [J & J Ormerod Plc]									
Catalogues	Defa	*Manufacturer	Catalogue Date	Ver	Discount Group	Priced	*Trade Disc%	*Retail Disc%	Supplier Margin%
<input checked="" type="checkbox"/>		Astracast	May 2018	1.70	(Default Discount)	Supplier Margin	20.00%		40.00%
<input type="checkbox"/>		Belling Appliances	Aug 2020	2.29	(Default Discount)	Supplier Margin	0.00%		0.00%
<input checked="" type="checkbox"/>		Book Of Bedrooms Colonial 2017	Oct 2018	1.45	(Default Discount)	Retail Price		40.00%	
<input checked="" type="checkbox"/>		Eco Kitchens 2019	Jan 2019	1.83	(Default Discount)	Retail Price		40.00%	
<input checked="" type="checkbox"/>		Neff Appliances	Aug 2020	2.29	(Default Discount)	Supplier Margin	0.00%		20.00%
<input checked="" type="checkbox"/>		Rangemaster	Aug 2020	1.89	(Default Discount)	Supplier Margin	0.00%		20.00%
<input checked="" type="checkbox"/>		Stoves	Aug 2020	1.42	(Default Discount)	Supplier Margin	20.00%		40.00%
<input checked="" type="checkbox"/>		Stoves Range Cookers	Sep 2016	1.57	(Default Discount)	Supplier Margin	0.00%		20.00%

Premium Catalogue: It is your responsibility to inform EQ Software of any updates to these brands

In the example above, the supplier has provided a mixture of both trade and retail prices for different catalogues. The first thing you will need to do is set your method of pricing using the **Priced** column.

Supplier Margin

Allows you, as the supplier of these products to your customers, to set your own margins against the catalogue. It is recommended to use this option when retail price is not available (see below), or when you wish to sell products at more or less than the supplier's recommended retail price.

Retail Price

Uses the supplier's retail price for this catalogue.

Product Margin

Will require additional configuration. Allows you to set a specific margin against product types, for example if you want to make 30% margin on all hobs, regardless of the manufacturer. It is not recommended to use this option.

Once you have set your pricing method, you will then need to enter the relevant figures. EQ works best when set to use margins – please see Appendix 4 for the comparable margin/mark-up conversion table and assistance with working this out.

IMPORTANT NOTE

All catalogues, for all suppliers, must be configured prior to use. You are responsible for ensuring that all catalogues are configured correctly.

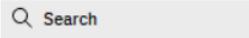
Checking your Prices

Finding Products



Once downloaded, all your products will be listed in the catalogue database located on the toolbar.

Click the Search button on the left-hand side of the screen



Enter a product code or part of the product code into the **Code** box.

Code	Description	Manufacturer	Range
D95FRM1S0B	N70 90cm Flat Creative Slimline Chimney Hood - Black Glass	Neff Appliances	N70
D95IHM1S0B	N50 90cm Angled Chimney Hood - Black Glass	Neff Appliances	N50
D95DAP8N0B	N90 Worktop Downdraft Hood - Stainless Steel/Glass	Neff Appliances	N90
D95IMT1N0B	N90 90cm Angled TC Chimney Hood - Black Glass	Neff Appliances	N90
D95BMP5N0B	N70 90cm Box Chimney Hood - Stainless Steel	Neff Appliances	N70
D95FMW1N0B	N90 90cm Flat Slimline Hood - Black Glass	Neff Appliances	N90

Single click on your desired item from the list of products to see further information in the bottom part of the window.

Detail Images Links Spec Comments Accessories Stock Properties Promotions Info Statistics

D95FRM1S0B £949.72
 N70 90cm Flat Creative Slimline Chimney Hood
 Waterline Blue Book

Specification
 [Key performance features]
 Energy Efficiency Class: A
 Extraction rate according to EN 61591 ø 15cm:
 max. Normal use 420 m³/h
 Intensive 730 m³/h
 Noise max. Normal Level: 56 dB

Select Product Price Guide

Click the calculator icon on the right-hand side to view your pricing information (exc. VAT).

Product Pricing Information

BasePrice- is the price that has been downloaded into EQ. This is the price that the supplier of this product has given to EQ and will usually match the price list they have provided to you.

CostPrice- is the price of this item to you, to purchase this product from the supplier as listed.

SellingPrice- is the price of this item to your customers.

Your cost and selling prices are calculated based on the discounts and/or margins you have applied in the Suppliers List > Catalogues window.

Product Pricing Information

- Product
 - D95FRM1S0B
 - N70 90cm Flat Creative Slimline Chimney Hood
 - Black Glass / D95FRM1S0B
 - EAN: 4242004210177
- Standard Pricing Details
 - Base Price
 - £791.43 Retail
 - Cost Price
 - £514.43
 - Discount : 35.00% [Supplier Cooker Hoods / Chimney Hood Group]
 - Selling Price
 - £791.43
 - Margin : 35.00% [Full Retail]

D95FRM1S0B
 N70 90cm Flat Creative Slimline Chimney Hood

Specification
 [Key performance features]
 Energy Efficiency Class: A
 Extraction rate according to EN 61591 ø 15cm:
 max. Normal use 420 m³/h
 Intensive 730 m³/h
 Noise max. Normal Level: 56 dB

OK

Click **OK** to close this window. Repeat for each price that you wish to check.

Basic System Configuration

Entering your Company Details



Click the **System Config** icon on your main menu bar.

Select the first option, **Your Company Details** on the left. Enter your company information on the right hand side.

System Configuration	
General	
Your Company Details	
Company Details	
Company	EQ Training Company
Contact	
Invoice Address	
Address	Ash Tree House
	Norman Court
Town	Ashby de la Zouch
County	Leicestershire
Postcode	LE65 2UZ
Phone No.	01827 839259
Fax No.	
Mobile No.	

If you have a different delivery address, select **Your Delivery Details** and enter the relevant information.

You will also need to enter your VAT registration number which you can do in **Currency/Tax Settings**.

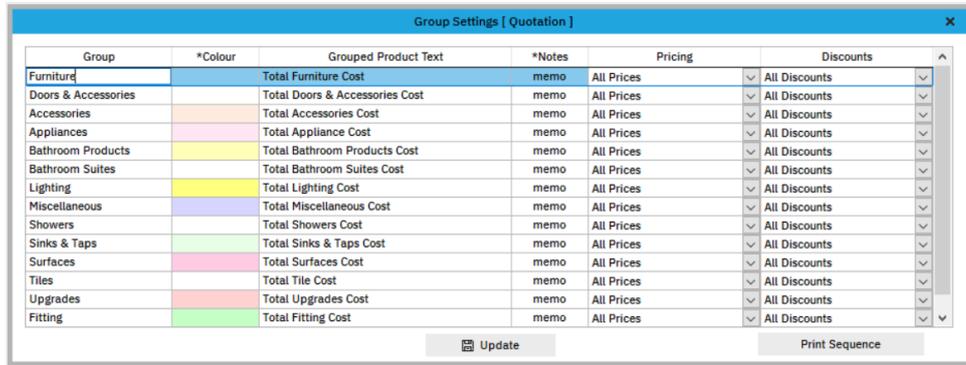
System Configuration	
General	
Your Company Details	
Your Delivery Details	
Currency / Tax Settings	
Currency / Tax Settings	
Registration No.	123456789
Sales Tax Rate	20.00
Tax Abbreviation	VAT
Country Code	United Kingdom
Currency Symbol	£
<input type="checkbox"/> Enable Multi-currency sales	

Click **Update** to save your changes and close System Config.

Configuring your Quotation Layout

Open System Configurations and select **Documents > Quotation Layout**, then click the **Quotation Group Settings** button on the right.

Quotation Group Settings



Select how you wish to show your prices for each of the product groups.

- No Prices** Lists all items without any individual prices
- All Prices** Lists all items with all individual prices
- All Prices + Sub-total** Lists all items with all individual prices and the sub-total for that product group
- Sub-total** Lists all items without individual prices but shows the sub-total for that group
- Group Products – Priced** Groups all items together and shows the price for the product group
- Group Products – Unpriced** Groups all items together without a price for the product group

The below example shows what a quotation might look like with the following settings applied:

Furniture: Group Products – Unpriced

Doors & Accessories: Group Products – Priced

Appliances: No Prices

Lighting: Sub-total

Sinks & Taps: All Prices + Sub Total

Surfaces: All Prices

Qty	Product Code	Description	Value
Furniture			
1	FURNITURE	Total Furniture Cost	
Doors & Accessories			
1	DOORS & ACC	Total Doors & Accessories Cost	£ 489.60
Appliances			
1	B48FT78H0B	Neff Appliances N90 Slide & Hide Single Oven With CircoTherm Black/Steel	
1	T59TF6RN0	Neff Appliances N90 90cm Flexinduction Hob Black/Stainless Steel	
Lighting			
1	SE15091W 8.1	Sensio Furniture Lighting Specto Round Plinth Light - 8 Light Kit Warm White	
1	SE7305HDCW.24	Sensio Furniture Lighting Verso HDLED 3.3W Drawer Light - 562mm Cool White	
Sub-Total			£ 91.44
Sinks & Taps			
1	MRX16034-19LHSB	Franke Sinks & Taps Maris 1.5 Bowl Sink, LH Small Bowl Stainless Steel	£ 387.51
1	MINERVAELECCH	Franke Specialist Sinks & Taps Minerva Electronic 4-in-1 Tap Chrome	£ 1,500.00
Sub-Total			£ 1,887.51
Surfaces			
1	PRIMA36006	Prima 3600 x 600 x 40mm Worktop - Riverwash FP2699 Black Granite	£ 168.14
1	PRIMA36606	Prima 3600 x 665 x 40mm Breakfast Bar - Riverwash FP2699 Black Granite	£ 244.24
Sub-Total			£ 412.38
Sub-Total			£ 7,030.47
Sub-Total			£ 7,030.47
VAT @ 20.00			£ 1,406.09
TOTAL			£ 8,436.56

Remember to click **Update** on any windows to save your changes.

Adding your Logo

You can display your company's logo as a header to the EQ Software documents.

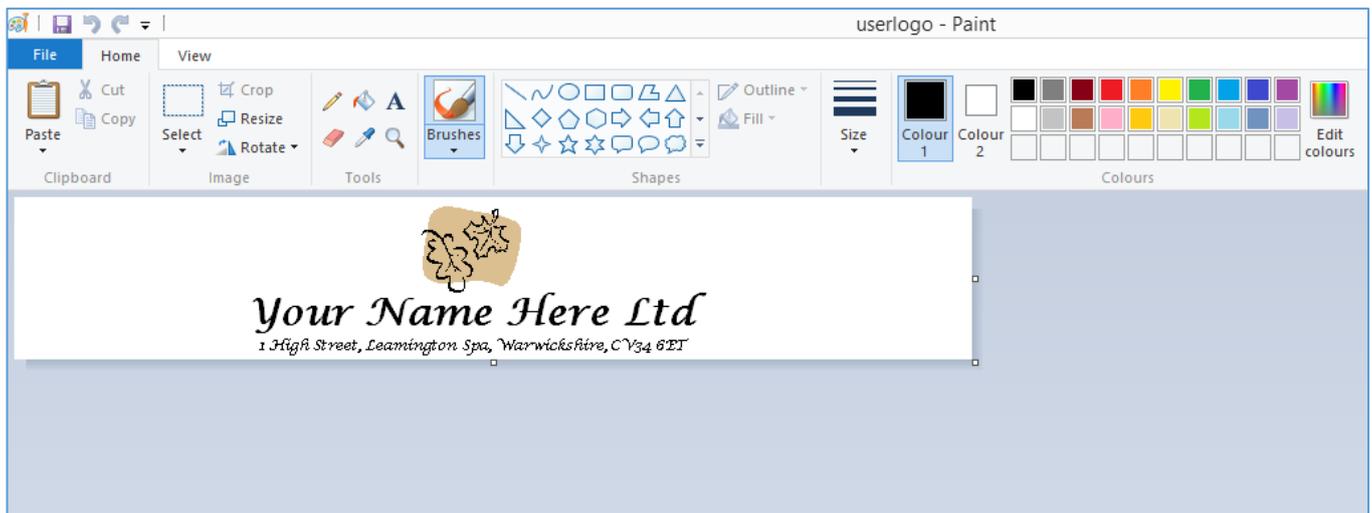
Part 1

- In EQ, from **System Config**, under **Documents** click **General Layout**
- Tick the box **Show Company Logo**. This displays the graphic on each document
- Click Update
- Close EQ

Part 2

By default, the graphic contains "Your Name Here Ltd" text but this now needs replacing with your own logo. You also need to include your address details because the graphic fills the top section of the documents and replaces the address.

- Open **My Computer** to browse to C:\Program Files\Easyquote4 and find the file **userlogo.bmp**
- Right click the file and go to **Open with...** and pick Paint. (NB If you use other graphic editing software you can use this to make the changes, but these instructions show the use of Paint)

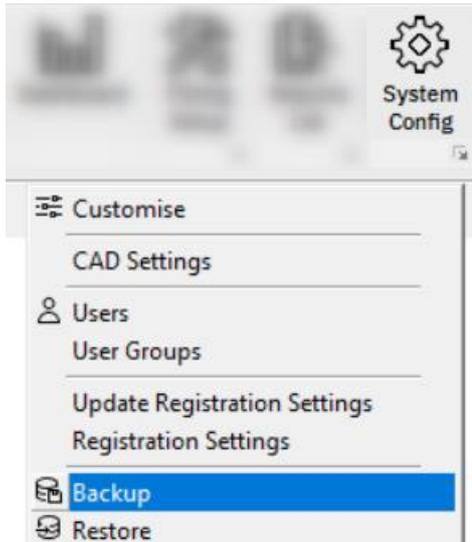


- To remove the default contents, click the Select tool and drag across from the top left-hand corner to the bottom right-hand corner, to select everything in the current image. Press the Delete key on your keyboard
- You can copy and paste your company logo into this image and position it. You can also insert text for the contact details by using the **A** button
- There is no limit to the contents of this image but ensure that the graphic is always kept at the same size (720 pixels by 124 pixels)

Save the graphic when you are finished and return to EQ. Go to a print preview (**Product Information**, for example) and you will see the new graphic appearing as the header. If you make amendments to the logo, restart EQ before going to print.

Backing Up your Data

It is strongly recommended to back up your data regularly. You will need to ensure that everyone apart from the **Administrator** is logged out of EQ.



Click the **System Config** drop-down arrow from the main menu bar and select **Backup**.

You might want to consider changing the location of the backup file, which can be done by clicking the  icon and choosing another location, such as a memory stick or an external hard drive.

(This location can be changed by default in System Config > Miscellaneous Configuration > Backups.)

Click **Backup**.

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