





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 <u>training.eq@compsuoftgroup.com</u> 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:

Hide Locate Back Forward	C @ E- Hone Pret Options
Contents Index Search Favorites	Revigence: - No topics above this invel- Introduction
Proved registration Proved registration Mobile Apps Tutorial Videos Proved registration Accounts Links Barcodes CAD Software Links	SON EQ
Contract Sites v1 Contract Sites v2 Contract Sites v2 Contract Sites v2 Deshboard	Welcome to the EQ Support Centre
Delivery Notes Diary Views	How to use Help
eStore eFiting eInvoicing Mu Catalogue	• Press F1 on the keyboard from any screen within EQ and the help file will open at the relevant page or visit http://eq.compuscitgroup.com/documents/help/
Payments Projects Print	Go to Search and type in a keyword.
Production Modules Purchase Orders Orgonture	Table of Contents is on the left
Outraines Outraines Preparts Preparts Preparts	Click on a main toolbar button to jump straight to that topic:
A grant cuts wenus Suppliers Toolber Tools System Configuration Utilities	Image: Section of Control Margin Product Ma
 ■ ♥ Word Processor ■ ♥ Workflow ■ I Software Requirements ● Resources 	Read more detail When you see a plus # next to a sub-beading in a topic click it to expand the section and read more detail under the sub-beading. You can also click on screenshots to make them larger.
	Further Help - Software Support

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**.



Premium Suppliers are listed separately underneath this list. **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.

	Download Catalogues	×
Catalogues	Your Available Catalogues Issue Size Notes	^
Selected Catalogues	Updated Catalogues	
No Catalogues Selected	Available Catalogues	
	⊞ A & H Kitchens	
Select Updated Catalogues	AB Distributors Limited (UK)	
Download Selected Catalogues	E Mulicare	
	⊕ ☐ Abacus Direct Limited	
Print Catalogue Info	E II Acquabella	
Refresh Catalogues List	⊡ III Air Uno	
	🗄 🛗 Alan T. Carr Plumbing	
	Alliance Sanitary Products Ltd	
Premium Catalogues	⊞ III Alno UK Ltd	
Premium catalogues are not	Ambiance Bain	
supported by the manufacturer. It is	⊞ III Amtico	
your responsibility to send any new	🕀 📋 Aqata Ltd	
so we can keep the catalogue up to	⊞ III Aqualisa Products Limited	
date for you	⊞ III Aqualla Brassware Ltd	
	⊞ ·· [j]] Arcadia Bespoke Handcrafted	
	⊞ []] Armitage Shanks	
🔄 Email Supplier Request	⊞ III Arte Form Ltd	
Selected Catalogues	⊡ III Astro Lighting Ltd	
No Catalogues Selected	⊞	
	⊞ [[]] BC Designs	
Purchase Catalogues	⊕ ∭ Barwick	~

- 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
- 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.

	Catalogue Updates	×
Update Catalogues	Available Catalogues Date/Version	
 ✓ Updated Catalogues ✓ Supplier Catalogues ✓ All Catalogues Import Catalogues 	Abacus Direct Limited EQ Furniture The Lubina Kitchen & Bedroom Company Vanity Hall	

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. Supplier Details:[3&3 Ormerod Pic-55]

Suppliers		Sup	pplier Details :	[J & J Orme	rod Plc - 55]					
Find		Lis	t General	Account Detai	Is Contact Nun	nbers	General M	Notes	Info	
Supplier	-	P	*Supplier	Name	Phone		Fax		We	bsite
	Q	B	Blackheath Produ	cts Ltd	0121 5614245	0800	634 0113	www.	blackhea	athproducts.co.ul
		C	DA		01949 862010	01949	862001	www.	cda.eu	
-		C	Chippendale Kitcl	hens	01405 743333	01409	5 743330	www.	chippen	dalekitchens.co.u
Folder	•	C	Claygate Distribut	tion Ltd	01622 833633	01622	2 832419	www.	claygate	.co.uk
🖻 Email		C	Crosswater Holdin	ngs Limited	0345 873 8840	0345 873 8841		1 www.crosswater.co.uk		ter.co.uk
PG		0	Davroc Ltd		01992 441 672	01992	2 708 301 www.davroc.co.uk		o.uk	
Catalogues		E	ast Coast Fitting	s Limited	01664 424 288	01664	1664 424 243 ww		www.ecf.co	
New Communication		E	Q Furniture		0845 6031370	0845	280 5002	www.	eqsoftw	are.net
		E	Q Generic Furnit	ure						
		E	Q Innoplus Gene	ric Bathrooms						
		H	HiB Ltd		0208 441 0352	0208	441 0219	www.	hib.co.ul	¢
		J	& J Ormerod Pl	D	01706 877877	01706	5 879827	www.	jjoplc.co	m
		J	& J Ormerod Pl	c (Bathrooms)	01706 877877	01706	5 879827	www.	jjoplc.co	m
		K	(euco UK		01442 865 220	01442	2 865 260	www.	keuco.co	o.uk
		L	eicht.		49-7171-402-0	49-71	71-402-30	www.	leicht.co	m
		N	Aiscellaneous Pro	ducts						
		N	leff - G7A							
		<								

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

		S	upplier Catalogues - [J & J O	rmerod Plc]					×
Catalogues	Defa	*Manufacturer	Catalogue Date	Ver	Discount Group	Priced	*Trade Disc%	*Retail Disc%	Supplier Margin%	^
% Discounts & Mardins	\sim	Astracast	May 2018	1.70	(Default Discount)	Supplier Margii 🗸	20.00%		40.00%	
76 Discounts & Margins		Belling Appliances	Aug 2020	2.29	(Default Discount)	Supplier Margii 🗸	0.00%		0.00%	
Individual Prices	\checkmark	Book Of Bedrooms Colonial 2017	Oct 2018	1.45	(Default Discount)	Retail Price 🗸		40.00%		
	\checkmark	Eco Kitchens 2019	Jan 2019	1.83	(Default Discount)	Retail Price 🗸		40.00%		
▲ Apply Price Increase	\checkmark	Neff Appliances	Aug 2020	2.29	(Default Discount)	Supplier Margii 🗸	0.00%		20.00%	
(2) Mala Data # 0	\checkmark	Rangemaster	Aug 2020	1.89	(Default Discount)	Supplier Margii 🗸	0.00%		20.00%	
103 Make Default Supplier	\checkmark	Stoves	Aug 2020	1.42	(Default Discount)	Supplier Margii 🗸	20.00%		40.00%	
+ Catalogue Downloads		Stoves Range Cookers	Sep 2016	1.57	(Default Discount)	Supplier Margii 🗸	0.00%		20.00%	
	-									
Discount Margin										
in Platent										~
		Premium Catalogue: It is your respon	sibility to inform EQ So	ftware o	f any updates to these bra	inds				

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

Product Catalogues 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 Q Search

earch

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

				Locate Product	:	
Code	Advanced Search	•	Specification			
All Products	Туре	•	Height = • 0			
Adora	Category	•	Width = • 0			
Ancillary Items	Range	Ψ	Depth = 💌 0			
Bathrooms 2 Love	Option	Ψ.				
Bathrooms To Love	Code	Des	ecription	Manufacturer	Pande	F
Belling Appliances	DOSEDM1SOR	NZO 90cm Elat Creative Slimling	Chimney Hood - Black Glass	Neff Appliances	N70	
Book Of Bedrooms Colonial 2017 Bosch Built In	D95IHM1S0B	N50 90cm Angled Chimney Hood	I - Black Glass	Neff Appliances	N50	
Bosch Freestanding	D95DAP8N0B	N90 Worktop Downdraft Hood - S	Stainless Steel/Glass	Neff Appliances	N90	
CDA	D95IMT1N0B	N90 90cm Angled TC Chimney He	ood - Black Glass	Neff Appliances	N90	9
Chippendale 2019	D95BMP5N0B	N70 90cm Box Chimney Hood - S	Stainless Steel	Neff Appliances	N70	
Chippendale Components	D95FMW1N0B	N90 90cm Flat Slimline Hood - B	lack 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	
				D95FF N70 9 Water Spec [Key Energ	RM1SOB 90cm Flat Creat line Blue Book ification performance fe ty Efficiency Cla	ive Slimlir atures] Iss: A	e Chimney Ho	od		£949.	.72 公
-	Extraction rate according to EN 61591 ø 15cm: max. Normal use 420 m³/h Intensive 730 m³/h Noise max. Normal Level: 56 dB							T			

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.



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 Contact Invoice Address	EQ Training Company
	Address	Ash Tree House Norman Court
	Town	Ashby de la Zouch
	Postcode	LE65 2UZ
	Phone No. Fax No.	01827 839259
O Document Titles	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**.

	13	System Configuration
General	Currency / Tax Settings	
Your Delivery Details	Registration No.	123456789
Currency / Tax Settings	Sales Tax Rate	20.00 🗊
	Tax Abbreviation	VAT
	Country Code	United Kingdom 👻
	Currency Symbol	£ =
		Enable Multi-currency sa
Co mile Landland		

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

Group	*Colour	Grouped Product Text	*Notes	Pricing		Discounts		^
Furniture		Total Furniture Cost	memo	All Prices	\sim	All Discounts	\sim	
Doors & Accessories		Total Doors & Accessories Cost	memo	All Prices	\sim	All Discounts	\sim	
Accessories		Total Accessories Cost	memo	All Prices	\sim	All Discounts	\sim	
Appliances		Total Appliance Cost	memo	All Prices	\sim	All Discounts	\sim	
Bathroom Products		Total Bathroom Products Cost	memo	All Prices	\sim	All Discounts	\sim	
Bathroom Suites		Total Bathroom Suites Cost	memo	All Prices	\sim	All Discounts	\sim	
Lighting		Total Lighting Cost	memo	All Prices	\sim	All Discounts	\sim	
Miscellaneous		Total Miscellaneous Cost	memo	All Prices	\sim	All Discounts	\sim	
Showers		Total Showers Cost	memo	All Prices	\sim	All Discounts	\sim	
Sinks & Taps		Total Sinks & Taps Cost	memo	All Prices	\sim	All Discounts	\sim	
Surfaces		Total Surfaces Cost	memo	All Prices	\sim	All Discounts	\sim	
Tiles		Total Tile Cost	memo	All Prices	\sim	All Discounts	\sim	1
Upgrades		Total Upgrades Cost	memo	All Prices	\sim	All Discounts	\sim	E
Fitting		Total Fitting Cost	memo	All Prices	\sim	All Discounts	~	1

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 –	Qty	Product Code	Description			Value
Unpriced	Furniture	FURNITURE	Total Furniture Cost			
Doors & Accessories: Group	Doors & A	ccessories				
Products – Priced	1	DOORS & ACC	Total Doors & Accessories Cost		£	489.60
	Appliance	5				
	1	B48FT78H0B	Neff Appliances N90 Slide & Hide Single Oven With CircoTherm Blac	k/Steel		
Appliances: No Prices	1	T59TF6RN0	Neff Appliances N90 90cm Flexinduction Hob Black/Stainless Steel			
	Lighting					
Lighting: Sub-total	1	SE15091W8.1	Sensio Furniture Lighting Specto Round Plinth Light - 8 Light Kit Warn	n White		
	1	SE7305HDCW.24	Sensio Furniture Lighting Verso HD LED 3.3W Drawer Light - 562mm	Cool White		
Sinks & Taps: All Prices + Sub Total			Su	b-Total	£	91.44
	Sinks & Ta	aps				
	1	MRX16034-19LHSB	Franke Sinks & Taps Maris 1.5 Bowl Sink, LH Small Bowl Stainless S	eel	£	387.51
Surfaces: All Prices	1	MINERVAELECCH	Franke Specialist Sinks & Taps Minerva Electronic 4-in-1 Tap Chrome	9	£	1,500.00
			Su	b-Total	£	1,887.51
	Surfaces					
	1	PRIMA36006	Prima 3600 x 600 x 40mm Worktop - Riverwash FP2699 Black Granit	e	£	168.14
	1	PRIMA36606	Prima 3600 x 665 x 40mm Breakfast Bar - Riverwash FP2699 Black (Granite	£	244.24
				Nett 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.

