

NEW FEATURES IN VERSION 17

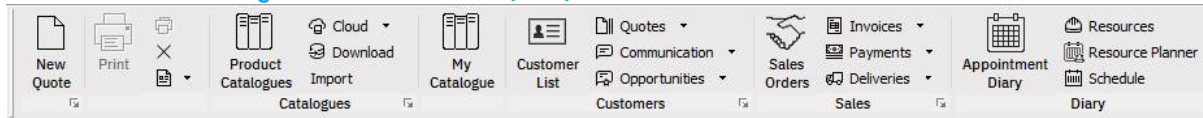
Key: Features are labelled for availability in: **F** for *Foundation*, **P** for *Professional*, **F&P** for both

NEW LOOK & FEEL

Cleaner Interface (F&P)

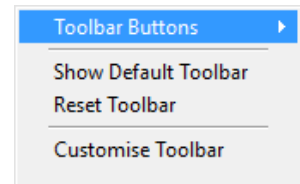
The new look features a streamlined interface common across all Compusoft applications making it easier to use all applications together. When used together with Innoplus, Innoplus will inherit the EQ blue theme on the interface.

Toolbar Ribbon Design & Customisation (F&P)

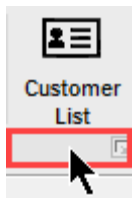


A new toolbar design allows grouping of buttons. By default your toolbar groupings remain unset. Groups contain 1 main button and up to 3 mini buttons, therefore you can fit more buttons onto the screen for one click quick access. E.g. Customer has been grouped with Quotes, Communication and Opportunities above.

Right-click on the toolbar and select **Customise Toolbar**.



Toolbar Menus (F&P)



The main toolbar now allows menus to be opened by clicking any area of the lower button.

Previously it was necessary to accurately click the expand arrow to access the menu so the new button is now larger and easier to click,

Quick Contact Shortcuts (F&P)

Shortcuts have been added to many grids showing customer name, resource name, or supplier name.

Double-click for a quick contact card and shortcut buttons (shown right).



Communication entries (F&P)

Communication is the new name for Contact History entries and is used throughout the screens.

3 Right-click Shortcuts (F&P)

Right-click quote and order ref for 3 new options: create **new communication**, **new email** or **new text**. Each maintains the order ref link so that merge fields from the relevant data will work.

Easier input into numeric fields (F&P)

Previously numeric fields required either accurately clicking to place the cursor in the appropriate position, or triple-clicking to select all text. Now across the numeric boxes you can simply click once and begin typing the new value. This behaviour more closely matches other applications. This setting is enabled by default and can be switched off within **System Config > Quotations & Pricing > Pricing > Select Numeric Data on Entry**. When the box is checked the single-click behaviour is enabled.

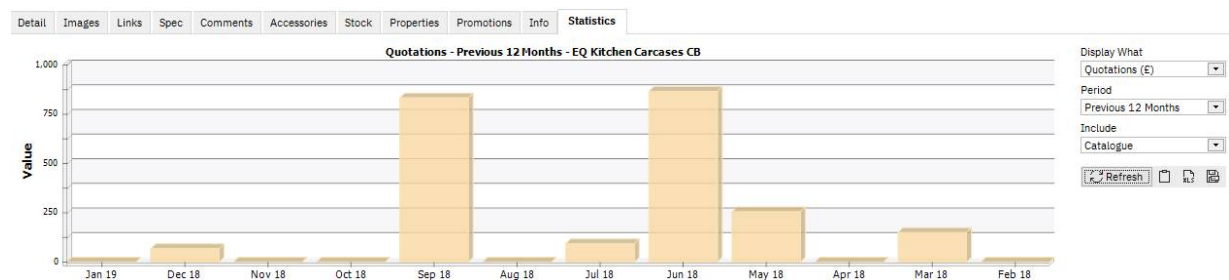
CATALOGUES

Search by Stock Code (P)

The product search screen now shows the stock code, and you can enable searching by stock code in the Advanced Search box (Useful for when it is different from your product code). Enable the option in **System Config > Customise > Optional Modules > Stock Control**. Tick **Add stock code to the product screen**.

Product Statistics for Reporting (F&P)

Within Catalogues, at each product a new **Statistics** tab gives you quick reporting on specific product, catalogue or supplier for quantity and values sold. You can select time periods to report on. Graphs can be saved as images or exported to a spreadsheet.



User Defined Fields (F&P)

You can assign up to 10 user defined fields to store extra data against each product. You can define each field as character, numeric, date or selection list. Each field can be edited individually on a product or export to a spreadsheet, add/edit and then import back in to quickly edit in bulk. View the fields in Product Catalogues > locate a product > click the **Info tab** to see the fields.

Click **edit** and then the  **cog** icon to setup the field titles.

Character	Own criteria
Number	1.50
Date	31/01/2020
Selection list	Option 2

Stock Orders Price (P)

Stock orders no longer show any selling price in the column. They are raised internally for purchasing and booking in, so selling price is not relevant to a stock order.

QUOTATIONS AND ORDERS

Quick Delete (F&P)

A new quick delete icon shows for every line within a quote or order. Click to delete the item from the quote/order. The option can be disabled in **System Config > Documents > Quotation Layout** tick **Disable quick delete button**.



Shortcut for Product Info with "i" button (F&P)

At the bottom left of the quote/order screen click the **i** icon to get to the product information window. This is a shortcut to the same information available from the right-click menu > **Product/Pricing Information**.

Columns for Cost & Margin (F&P)

You can customise the quotation screen to show cost price or margin for quick access. You can set EQ to recalculate 2 of the 3 out of cost, margin and sales price. Enable this in **System Config > Quotations & Pricing > Pricing** > tick **Show cost price on Quotation screen** and **Show margin on Quotation screen**. Also enable in **Users > Additional Info > Margin/Costs** tab for each user required.

Columns for Product User Defined Fields

Product user defined fields can be added to show in the quote/order screen. Columns can be linked to product user-defined fields by entering the UDF field number. E.g. Drawing number could appear on the quote screen. Set in **System Config > Quotations & Pricing > Configuration**.

Filters Within the Quotation Screen (F&P)

Filters can help you with long quotes so you easily navigate products and duplicate items. In **System Config > Quotations & Pricing > Configuration** and tick any of the following:

product code, product type/category, quotation group, phase, catalogue, supplier, heading.



Filters show across the bottom of the screen, select then click the tick to apply, or click duplicate to copy and paste all of those items onto the bottom of the current quote/order. All filters work in **Edit** mode of the quote/order, and once saved you can also apply filters to place purchase orders on only the selected products.

Column for Furniture Headings (F&P)

A column can be shown on the quote/order screens to show the furniture headings. For example, you use multiple headings when mixing two ranges of furniture for wall and base units. The column lets you easily see and change which heading each product is in. Availability is checked and prices changed directly on the quote screen. Enable in **System Config > Quotations & Pricing > Configuration** > tick **Show range heading against each option**.

Right-click Product Menus (F&P)

Right-click menus have been tidied up. **All Notes** has consolidated Product notes, Fitting notes and User comments.

Both product information and pricing information have been consolidated into **Product/Pricing Information**.

Right-click... Every Instance (F&P)

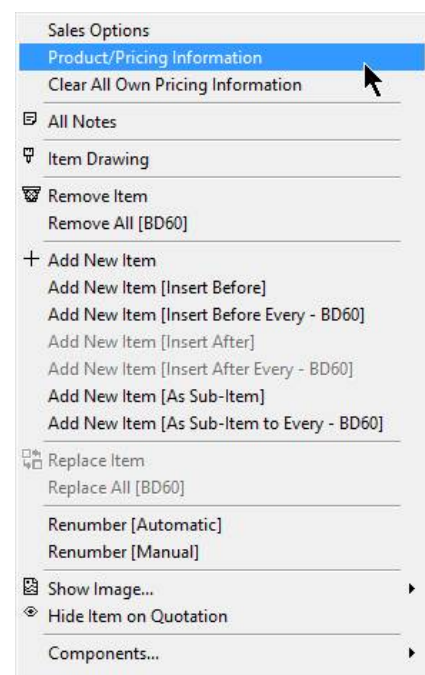
When working with very large quotes you can now perform product actions on every instance of the same product on a quote/order:

Insert Before Every x will open search and add a new product before every instance of the product selected

Insert After Every x will open search add a new product after every instance of the product selected

Insert as Sub-Item to Every x will open search and add sub-items to every instance of the product selected

(Note that **insert after** is not available when the product has sub-items attached).



Change Every Instance (F&P)

When you have more than 1 product with the same product code on the quote/order and change a price by overtyping it EQ will ask "Apply to all [product code]". Click **Yes** to change all prices or No for just the current product.

Phases on Retail Quotes (F&P)

Phases let you classify all products on your quote/order (e.g. fixes). Enable this in **System Config > Documents > Quotation Layout**. Define your title for the column, define a list of phases and you can set phases in bulk against product types and categories.

Delivery Charges on Purchase Orders (F&P)

There is a new option when creating a Purchase Order to add a supplier's Delivery Charge. This links back onto the sales order with a cost price and no sales price. The delivery charge links to a My Catalogue code. You need to first set this up in **System Config > Purchase Order Configuration** and tick **Prompt for delivery charge** and specify a My Catalogue product code. The product in My Catalogue should be set to auto hide (as with any own product displaying a charge).

Generate Purchase Order - [A & B Smith - 122141 / Cab Builder]

EQ Furniture

Order Details

Own P/O Ref.

Delivery Date 29 February/2020

Delivery Text

Placed By Administrator

Send Via Print

Delivery Charge 100.00

Delivery Address

Dans Admin User
Street
Measham
Leicestershire
DE12 7NJ

Special Instructions

Payment Options (F&P)

A new option has been added to prevent payments being recorded on a quotation (rather than a sales order). The tick box is in **System Config > Quotations & Pricing > Payment Stages > tick Don't allow payments against a quotation**.

CUSTOMER SCREEN

Email Merge Fields (F&P)

New merge fields have been added for use in email templates for the following:

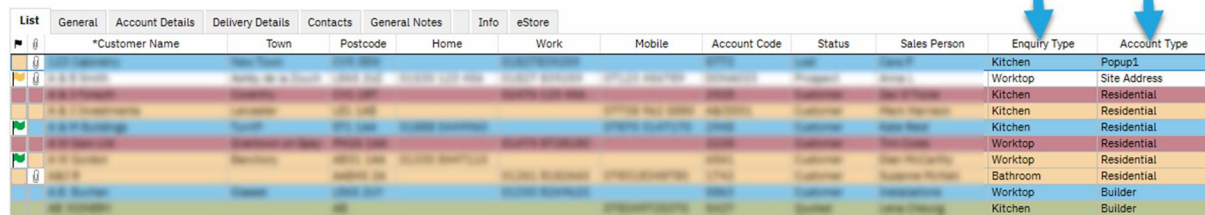
- Order delivery date week number: |Q_CUSTDATENO|
- Each individual field of the customer address: |C_ADD1|, |C_ADD2|, |C_TOWN|, |C_COUNTY|, |C_POSTCODE|
- Opportunity merge fields in the following format: |OP_DATE|, |OP_DESCRIPTION|, |OP_ESTVALUE|, |OP_QTY| See the help file for full list.

Filter by "No Sales Person" (F&P)

In the customer screen, click **Filter** and from the sales person list you can now pick <-- No sales person --> to show all records without any sales person specified.

Customer Screen List (F&P)

The Customer screen list view has 2 new columns added for the customer user-defined classification fields. (In the example below they have been named *Enquiry Type* & *Account Type*). They are set on the **General** tab, the 2 fields below Showroom and automatically appear as a new column on the **List** tab.



The screenshot shows a table with columns: *Customer Name, Town, Postcode, Home, Work, Mobile, Account Code, Status, Sales Person, Enquiry Type, and Account Type. Two blue arrows point to the 'Enquiry Type' and 'Account Type' columns. The table contains several rows of data with alternating colors.

#	@	*Customer Name	Town	Postcode	Home	Work	Mobile	Account Code	Status	Sales Person	Enquiry Type	Account Type
0											Kitchen	Popup1
0											Worktop	Site Address
0											Kitchen	Residential
0											Kitchen	Residential
0											Kitchen	Residential
0											Worktop	Residential
0											Worktop	Residential
0											Bathroom	Residential
0											Worktop	Builder
0											Kitchen	Builder

Compulsory Fields (F&P)

New compulsory fields have been added for each of the customer delivery address fields. See **System Config > Miscellaneous Config > Customer Database > Compulsory Fields** to select.

Customer Status Change Date (F&P)

The date of customer status, last changed, is now on the customer screen **General** tab.

Right-click an Opportunity to transfer to another customer (P)

Right-clicking the opportunity ref allows you to transfer it to another customer. Within that screen you can elect to transfer all contact history, contact history only relevant to the resources, and the quotes linked to that opportunity.

SYSTEM SETTINGS

Cloud Databases (F&P)

When first opening EQ it will attempt to create a new cloud database if one doesn't already exist for your dataset. Your data must have a dataset number and support key present to be created. Cloud databases can be created manually in **System Config > Optional Modules > EQ Cloud**.

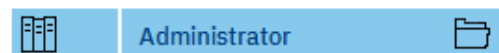
Email CC field per user (F&P)

Within the **System Config menu > Users > Additional Info** you can now specify that another address is always copied in to outgoing emails. This is in addition to CC at company level.

New User Folders (F&P)

One folder can be created for each EQ user. It is stored within ...data\user folders and is named with the user number. Click

the folder icon bottom right by user name. This can be used to organise and store any documents.



Database Integrity Message (F&P)

There is a new confirmation message for when data integrity has finished, informing the user of the disk space saved.

Maintenance & Housekeeping (F&P)

When a downloaded catalogue is imported, EQ will now clear out the folder where extracted catalogue files were previously left. Located in ...data\catalogues\downloaded.

Remove Unused Catalogues (F&P)

In System Config there is a new button to **Remove Unused catalogues** button now clears out the folder ...data\catalogues\downloaded as well as removing unused /datasets/ sub-folders for catalogues that are no longer installed.

Remove Redundant Catalogues (F&P)

Within the Remove supplier catalogues screen you can select **Remove redundant catalogues**. This checks the list of installed catalogues against EQ's master cloud database of catalogues and puts a check mark against any old catalogues that are no longer valid. Then you can continue to remove them from EQ.

ACCOUNTS INTEGRATION

Sage Cloud & Xero Compatibility (P)

New export fields have been created to add compatibility for Sage Cloud and Xero accounts software to the existing formats. New fields are in these exports: **customer**, **sales invoices**, and **purchase invoices**. Suppliers has a new export specifically for this.

The help file lists the standard formats for both Sage and Xero so users can match the fields in sequence as they go down the EQ screen.

EQ DESPATCH BARCODING

New Weekly Delivery Drag & Drop Scheduling (P)

Includes drag and drop scheduling for all customer deliveries and collections. Now includes, vehicle route optimisation (uses EQ online credits which require purchase), and route overview.

Weekly Delivery List	Mon 30	Tue 1	Wed 2
[Load1 - Van 1] - In Progress 2 drops / Anna L / 212.16 kgs	[Load2 - Larger Van] - In Progress 3 drops / F Jones / 65.60 kgs	Unscheduled 0.00 kgs	
[1: 123 Cabinetry] 122248 Test 6 cabs 123 Cabinetry del town DELPOST	[1: 123 Cabinetry] 122255 Test Hacker 13 cabs 123 Cabinetry del town DELPOST	[0: 123 Cabinetry] 122247 Waterline test 3 cabs 123 Cabinetry del town DELPOST	
[2: Asbey] 122232 PI test 0 cabs AB15 8EU	[2: Hacker] 122256 Hacker test 40 Horrowby Street W1H 5JN	[0: White, Shelly] 122230 111 0 cabs	
	[3: A & B Smith] 122252 2 cabs Ashby de la Zouch LE65 2UZ		

EQ Despatch mobile app (P)

The new mobile application for despatching orders with barcode item labels. Track deliveries and collections with live progress displayed in EQ.

It includes full integration with the new **Weekly Delivery List** to show recent vehicle location and current scanning progress of each load and order.

Create the loads and drops as above. Send to the mobile app and then track the drops through delivery stages. As each stage begins and is completed, data is synchronised back to EQ on your desktop and shows with the colour changes and progress. Capture delivery signatures, date and time and print proof of delivery from EQ.

The mobile app is made for iPhone and Android devices including a rugged Honeywell with barcode scanner.

