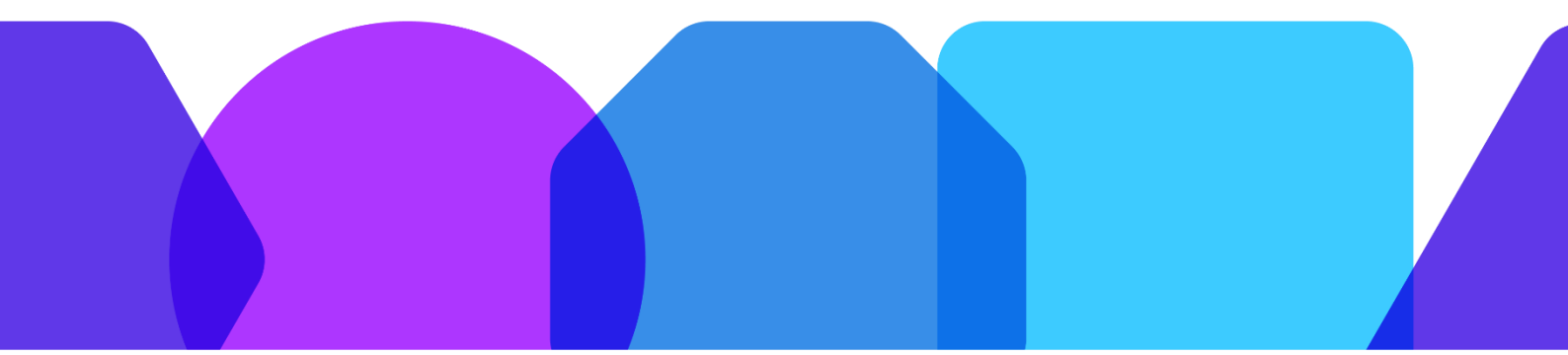




EQ Quick Setup Guide



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About EQ Software

Developed by a team of professionals from the KBB and IT industry, EQ was the first dedicated business management software solution for the kitchen, bedroom and bathroom market. EQ Software was created in 2000, and has become the leading provider of business management software for the KBB industry.

Our team of experienced and dedicated professionals provide continuing software development, on-line support, software training, the commissioning of bespoke software and product catalogue data services; all this is driven by direct feedback from our ever-growing customer base.

Products

EQ Foundation

Foundation is our entry level KBB management tool designed for companies on the first steps of software implementation. With a large number of standard features, the user has access to hundreds of kitchen and bathroom catalogues, customer database functions, quotations, purchase orders and integration links with all the top CAD vendors.

EQ Professional

Our flagship product, Professional incorporates all the great features of Foundation. Professional adds stock control, project management, accounts integration and boasts the largest number of features and optional modules available from the UK's leading KBB software provider.

eStore

With over 80% of consumers searching on-line before purchasing, it is essential for KBB retailers to have an on-line presence. EQ Software's unrivalled KBB experience and massive library of supplier pricing data, makes us the first choice for creating quality kitchen and bathroom websites.

Offices

EQ Software
Ash Tree House
Norman Court
Ashby de la Zouch
Leicestershire
LE65 2UZ

Help

Help can be found from the following sources:

- **In-System Help Menu** – for quick access to our Support Centre
- **Website** – compusoftgroup.com/support
- **Telephone** – 01827 839259 option 1.

Using this Guide

This setup guide is for first time set up and configuration of your EQ System.

EQ Flex users who are hosted, and any network connected EQ installations benefit from shared data. Therefore, any catalogues that you download and settings you apply will only need to be configured on one system, as the other users will be using the same database. Please speak to our Support Team for assistance with configuring EQ on your network.

If you are working with more than one stand-alone system, you will need to configure each system separately. It is strongly recommended that you ensure the Auto-Numbering is different between the two systems in case you ever want to combine the data later (EQ Professional only). Please see the section "Backing Up your Data" for tips on how to configure multiple stand-alone systems.

All configuration settings described are relevant for both the Professional and Foundation versions of the System.

Advisories:

Key Users are highly recommended to attend the EQ Basics Training Course. It is strongly advisable that all other Users participate in EQ Basics Training prior to using the system in order that they can be supported effectively by our technicians.

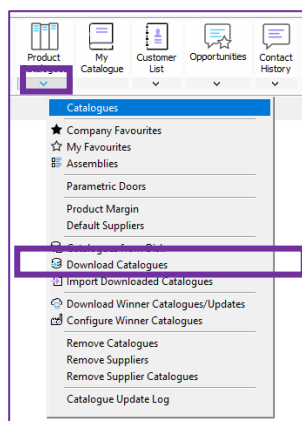
We highly recommend loading and configuring all required catalogues prior to attending training so that you can start using the system immediately afterwards.

Loading Supplier Catalogues

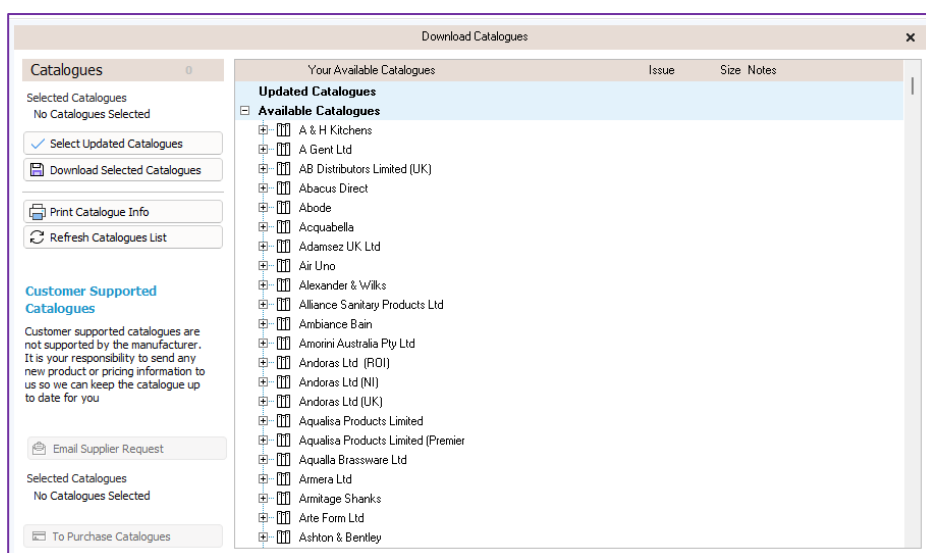
You can download catalogues from our server to select the suppliers that you work with.

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.

Catalogues that are not supported are available for a fee and are listed separately underneath this list (see below).

- Click the **+** next to a supplier's name to show the catalogues they have available
- 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



To start with, only download a small selection of catalogues from your main suppliers.

Catalogue Updates

All the catalogues which are installed on your EQ system and have newer updates available are shown in the top section of **Updated Catalogues**. To select them all in one go, click **Select Updated Catalogues** and an **X** will be selected against each one to select it for download.

Print Catalogue Info

Click this button to print a report showing all the suppliers and catalogues that you have installed, your default supplier settings, and additional notes.

Customer Supported Catalogues

Customer Supported Catalogues are not supported by the manufacturer. It is your responsibility to send any new product or pricing information to us so we can keep the catalogue up to date for you. To purchase a premium catalogue: Put an **X** next to the supplier's name. You will be purchasing access to all the catalogues within that supplier.

Click **Purchase Catalogues**. You will now be taken to a secure online payment page to enter your credit card details.

- Complete the checkout process and then return to EQ
- Within EQ click **Yes** to the question **Refresh Catalogue List**
- Now the catalogue list has refreshed, your purchases will be listed within available catalogues with all the other catalogues
- Put an **X** next to the catalogues you are ready to download, and you will now be able to download them, in the same way as all catalogues

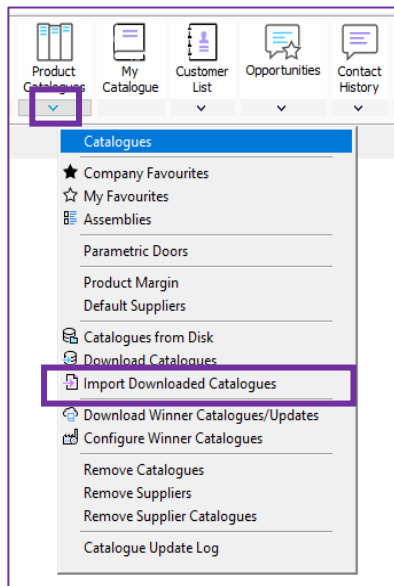
You will be notified with a dialogue box within EQ when the catalogue is approaching its renewal date so that you can purchase another 12 months access. If a premium catalogue expires you will be prompted within EQ to remind you that the data has expired and is therefore not going to be updated and you could be using out-of-date prices.

You can also send an endorsement and recommendation email to the supplier asking them to contact us:

- Click the supplier's name to highlight it as above
- Click the **Email Supplier Request** button
- A pre-authored email will appear in the new window
- Add to or edit the email as you require
- Check the email address is correct
- Press the send button to send the email

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.

Select your catalogues in the same way as part A by clicking the **+** and putting **X** marks in the boxes or click **Select All Catalogues** to do them all at once. 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. Follow these instructions and proceed to Part 3.

Parts 3 - Configure your Catalogues

- If you have loaded any new catalogues don't forget to set your discount and margins from the **Suppliers List** button before you start using products on a quote (see Configuring Catalogues in the next section)
- If you have loaded a new furniture catalogue you can disable the old catalogue to prevent the old one being used on new quotes
- If the catalogue is replacing an existing one, your margin and discount will be kept

Parts 4 - Check your Catalogues

- You can check your prices by going into the **Product Catalogues** screen, searching for a product and clicking the **Pricing Information** button

Hints and Tips



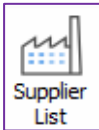
If you do not complete Part 2 immediately, the next time the administrator user opens EQ on the same PC, the user will be reminded that catalogues have been downloaded but not yet imported.

You can then load them immediately (part 2), delete them or cancel to be reminded next time you open the program.

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.

Find Supplier	Folder	Email	Catalogues
Supplier Details : [Abacus Direct - 379]			
General	Account Details	Contact Numbers	General Notes
Supplier Name	Phone	Fax	Website
Abacus Direct	0345 8505040	0345 8505030	www.abacus-bathrooms.co.uk
Adamez UK Ltd	028 908 17631	028 908 13640	www.adamez.com
Aqualla Brassware Ltd	0399 18 28000		www.aquallabassware.com
Blanco UK Limited	01923635200	0844 9120109	www.blanco.co.uk
Cabinet Vision	01664 424 288	01664 424 243	www.ecf.co
East Coast Fittings Limited	0845 6031370	0845 280 5002	www.eqsoftware.net
EQ Furniture	0203 3034 9470		www.eqfurniture.co.uk
Finish X	01908 328633	01908 328370	http://www.gaggenau.com/gb
Gaggenau UK & Ireland	0207 7235131	0207 7235166	www.haecker-luechen.com
Hacker	0203 981 1410	01706 877877	www.jesquer.org.uk
Jesquer UK Limited			www.jesque.com
JJO Plc (Bathrooms)			
Miscellaneous Products			
PWS Bathrooms	01325 329000		www.kindred.co.uk
PWS Distributors Ltd	01325 505555	01325 505500	www.pws.co.uk
Random Supplier			
Stocked Products			

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

Catalogues	Defa	*Manufacturer	Catalogue Date	Ver	Discount Group	Priced	*Trade Disc%	*Retail Disc%	Supplier Margin%
		Aqualla Brassware	Jan 2026	1.64	(Default Discount)	Supplier Margin			50.00%

The first thing you will need to do is set your method of pricing using the **Priced** column.

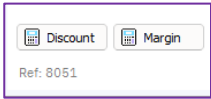
- Supplier Margin**
- allows you, as the supplier of these products to your customers, to set your own margins against the catalogue. It is recommended to use this option when retail price is not available (see below), or when you wish to sell products at more or less than the supplier’s recommended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

Hints and Tips



Use the Disc & Margin buttons to help with your calculations.



Using Supplier Margin

*Manufacturer	Catalogue Date	Ver	Discount Group	Priced	*Trade Disc%	*Retail Disc%	Supplier Margin%
Aqualla Brassware	Jan 2026	1.64	(Default Discount)	Supplier Margin ▾		50.00%	50.00%

This allows you to then enter a **DISCOUNT**, should you receive one from the supplier, in the **Trade Disc%** column, and the **MARGIN** you wish to make in the **Supplier Margin%** column.

Priced	*Trade Disc%	*Retail Disc%	Supplier Margin%
Supplier Margin ▾		0.00%	20.00%

Note that if you leave the **Supplier Margin%** at 0.00% this will mean you are selling your products at **NET TRADE PRICE**.

You may not always receive a discount from the supplier, in which case leave the **Trade Disc%** column at 0.00%.

Using Retail Price

If there is an option within the pricing method drop down to use retail price, and you sell at the supplier's retail price, select this option. You will then simply need to enter the amount of discount you receive from the supplier for that catalogue.

☒	Jaquar	Feb 2018	1.26	(Default Discount)	Retail Price ▾	40.00%	
-------------------------------------	--------	----------	------	--------------------	----------------	--------	--

IMPORTANT NOTE

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

Applying Additional Levels of Discount

You may find that some suppliers offer you additional levels of discount for either certain product types, ranges or individual items.

Product Types

Ensure your pricing method is set to supplier margin. Select your catalogue and click the **Discounts & Margins** icon on the left of the window.

Supplier Catalogues			
Catalogues	Defa	*Manufacturer	Catalogue Date
☒ Discounts & Margins	☒	PWS 1909	Nov 2024
☒ Individual Prices	☒	PWS Accessories	Jan 2026
☒ Exclude Products	☒	PWS Handles	Jan 2026
	☒	PWS In Frame Doors	2026
	☒	PWS Kitchen Doors	Aug 2025

This will open a window to allow different discounts and/or margins to be set against different types of product.

Aqualia Brassware					
Range	Trade Disc%	Retail Disc%	Discount Scheme	Supplier Margin%	
(Default Discount)		0.00%	(Default Discount)	20.00%	
Bathroom Accessories / Bottle Trap		0.00%	(Default Discount)	20.00%	
Bathroom Accessories / Flush Mechanism		0.00%	(Default Discount)	20.00%	
Bathroom Accessories / Hook		0.00%	(Default Discount)	20.00%	
Bathroom Accessories / Mirror		0.00%	(Default Discount)	20.00%	
Bathroom Accessories / Shelf		0.00%	(Default Discount)	20.00%	
Bathroom Accessories / Soap Dish		0.00%	(Default Discount)	20.00%	
Bathroom Accessories / Soap Dispenser		0.00%	(Default Discount)	20.00%	
Bathroom Accessories / Toilet Brush Holder		0.00%	(Default Discount)	20.00%	
Bathroom Accessories / Toilet Roll Holder		0.00%	(Default Discount)	20.00%	
Bathroom Accessories / Towel Rail		0.00%	(Default Discount)	20.00%	
Bathroom Accessories / Towel Ring		0.00%	(Default Discount)	20.00%	
Bathroom Accessories / Tumbler Holder		0.00%	(Default Discount)	20.00%	
Bathroom Furniture / Mirror Cabinet Double		0.00%	(Default Discount)	20.00%	
Bathroom Furniture / Mirror Cabinet Single		0.00%	(Default Discount)	20.00%	
Bathroom Furniture / Mirror Cabinet Trip		0.00%	(Default Discount)	20.00%	
Baths / Freestanding Bath		0.00%	(Default Discount)	20.00%	
Baths / Waste		0.00%	(Default Discount)	20.00%	
Brassware / Accessory		0.00%	(Default Discount)	20.00%	
Brassware / Basin Mixer		0.00%	(Default Discount)	20.00%	
Brassware / Basin Taps		0.00%	(Default Discount)	20.00%	
Update					

Discount Schemes

Reset All Discounts

Click **Update** to save and return to the previous screen.

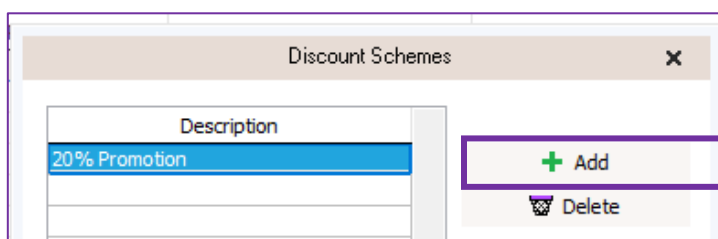
Range-Specific Detail (Furniture Catalogues)

In some instances, you may need to set different discounts across different types of product within different furniture ranges within a catalogue, for example when a supplier runs a promotion that only applies to base units within a certain range. Select your catalogue and click the **Discounts & Margins** button as described above.

Step 1: Click **Discount Schemes** on the right-hand side.

Discount Schemes

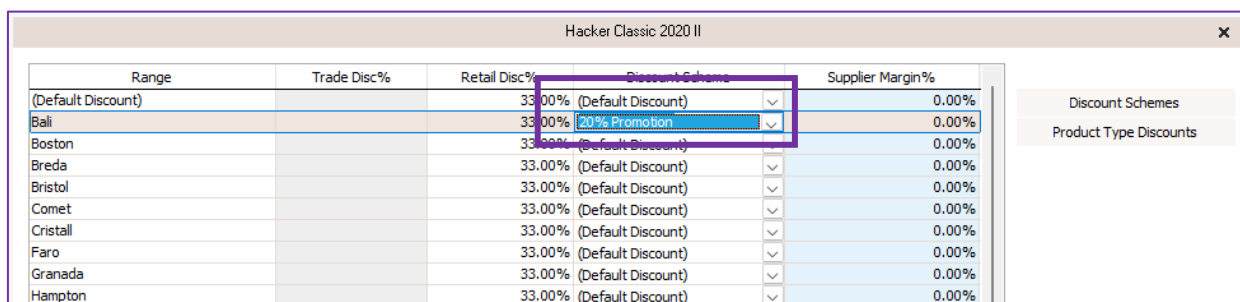
Step 2: Click **Add**, and give your scheme a name, for example 20% Promotion.



The image shows a 'Discount Schemes' dialog box. It has a title bar with 'Discount Schemes' and a close button. Inside, there is a table with a single row containing the text '20 % Promotion' under the 'Description' header. To the right of the table are two buttons: a green '+ Add' button and a trash icon followed by a 'Delete' button.

Step 3: Click **Update**.

Step 4: Select a range for which to apply the scheme, and from the Discount Scheme drop down menu choose the relevant scheme.



The image shows a product list window titled 'Hacker Classic 2020 II'. It contains a table with columns: Range, Trade Disc%, Retail Disc%, Discount Scheme, and Supplier Margin%. The 'Discount Scheme' column has a dropdown menu open, showing '20% Promotion' selected. To the right of the table is a sidebar with 'Discount Schemes' and 'Product Type Discounts' sections.

Range	Trade Disc%	Retail Disc%	Discount Scheme	Supplier Margin%
(Default Discount)		33.00%	(Default Discount)	0.00%
Bali		33.00%	20% Promotion	0.00%
Boston		33.00%	(Default Discount)	0.00%
Breda		33.00%	(Default Discount)	0.00%
Bristol		33.00%	(Default Discount)	0.00%
Comet		33.00%	(Default Discount)	0.00%
Cristall		33.00%	(Default Discount)	0.00%
Faro		33.00%	(Default Discount)	0.00%
Granada		33.00%	(Default Discount)	0.00%
Hampton		33.00%	(Default Discount)	0.00%

Step 5: You will now need to configure that scheme, having applied it to one range. Ensuring you still have the relevant range selected, on the right-hand side click **Product Type Discounts**.

Product Type Discounts

Step 6: Find each product type/category and apply the relevant total % discount against each line for which the additional discount applies.

Product Type Discounts			
Discount Scheme: 20% Promotion			
Type	Category	Trade Disc%	Retail Disc%
Accessories	Accessory		20.00%
Accessories	Basket		20.00%
Accessories	Breakfast Bar Leg		20.00%
Accessories	Chair		20.00%
Accessories	Corner Filler		20.00%
Accessories	Cornice Pelmet		33.00%
Accessories	Cutlery Insert		33.00%
Accessories	Divider		33.00%
Accessories	Door Buffers		33.00%
Accessories	Drawer Box		33.00%
Accessories	Drawer Management		33.00%
Accessories	End Panel		33.00%
Accessories	Filler Panel		33.00%
Accessories	Gable		33.00%
Accessories	Glass Shelf		33.00%
Accessories	Handle		33.00%
Accessories	Handleless Profile		33.00%
Accessories	Hinge		33.00%
Accessories	Legs		33.00%
Accessories	Lifting System		33.00%

Step 7: Click OK to save and return to the previous screen.

Step 8: You can now apply the discount scheme against all other ranges to which it is relevant, without the need to follow steps 1-7 for this particular scheme.

Repeat steps 1-8 as necessary for other schemes, e.g. for a 20% promotion.

Hacker Classic 2020 II				
Range	Trade Disc%	Retail Disc%	Discount Scheme	Supplier Margin%
(Default Discount)		33.00%	(Default Discount)	0.00%
Bali		33.00%	20% Promotion	0.00%
Boston		33.00%	(Default Discount)	0.00%
Breda		33.00%	(Default Discount)	0.00%
Bristol		33.00%	(Default Discount)	0.00%
Comet		33.00%	20% Promotion	0.00%
Cristall		33.00%	(Default Discount)	0.00%
Faro		33.00%	(Default Discount)	0.00%
Granada		33.00%	(Default Discount)	0.00%
Hampton		33.00%	(Default Discount)	0.00%

On occasion, a supplier may give you a special price/discount for just one item, or a number of items but for which the above tools are not sufficient. In this scenario you will need to configure individual product prices. From the **Catalogues** icon, select your catalogue and ensure it is set to use the supplier margin method for pricing, and that you have set a default discount/margin (the default is that which will apply to the majority of products within this catalogue). Click **Individual Prices** on the left.

This will allow you to set either a discount and margin, or cost and sell price against individual products.

Own Prices

Find Code

Q

Filter List

Import from Excel

Export to Excel

Code

Description

Option Colour

Group

Catalogue Price

Selling Price

%Selling Disc%

*Selling Margin%

Cost Price

Cost Disc%

Disc Group

Product Type

Product Category

*Exclude

236715

Dinas 8 S Inset Sink

Stainless Steel

348.00 Retail

0.00

0.00

0.00

0.00

0.00

Sinks

Stainless Steel 2.0 Bowl

☐

236784

Dinas XL 6S Inset Sink

Stainless Steel

188.00 Retail

0.00

0.00

0.00

0.00

0.00

Sinks

Stainless Steel 1.0 Bowl

☐

237356

Dinas 4SS Mini Inset Sink

Stainless Steel

138.00 Retail

0.00

0.00

0.00

0.00

0.00

Sinks

Stainless Steel 1.0 Bowl

☐

459927

Universal Odour Trap

Accessory

24.00 Retail

0.00

0.00

0.00

0.00

0.00

Sinks

Accessory

☐

459929

Double Bowl Connection Kit

Accessory

28.33 Retail

0.00

0.00

0.00

0.00

0.00

Sinks

Accessory

☐

459930

Tap Hole Cover, 43mm Diameter

Stainless Steel

9.99 Retail

0.00

0.00

0.00

0.00

0.00

Kitchen Taps

Accessory

☐

459938

Converter Metric To 1 1/2" Waste

Accessory

1.24 Retail

0.00

0.00

0.00

0.00

0.00

Sinks

Accessory

☐

452613

Supra 400-U 1 Bowl Undermount Sink, Universal

Stainless Steel

BL

148.00 Retail

0.00

0.00

0.00

0.00

0.00

Sinks

Stainless Steel 1.0 Bowl

☐

452614

Supra 400-U 1 Bowl Undermount Sink, Universal

Stainless Steel

BL

168.00 Retail

0.00

0.00

0.00

0.00

0.00

Sinks

Stainless Steel 1.0 Bowl

☐

452615

Supra 500-U 1 Bowl Undermount Sink, Universal

Stainless Steel

BL

188.00 Retail

0.00

0.00

0.00

0.00

0.00

Sinks

Stainless Steel 1.0 Bowl

☐

453634

Dinas 6S Sink

Stainless Steel

198.00 Retail

0.00

0.00

0.00

0.00

0.00

Sinks

Stainless Steel 1.5 Bowl

☐

453665

Essential 530-U 1.5 Bowl Sink + Waste Kit

Stainless Steel

328.00 Retail

0.00

0.00

0.00

0.00

0.00

Sinks

Stainless Steel 1.5 Bowl

☐

454076

Typo 4S Compact 1.0 Bowl Sink

Stainless Steel

128.00 Retail

0.00

0.00

0.00

0.00

0.00

Sinks

Stainless Steel 1.0 Bowl

☐

454436

Dinas 4SS (BP1052)

Stainless Steel

168.00 Retail

0.00

0.00

0.00

0.00

0.00

Sinks

Stainless Steel 1.0 Bowl

☐

456438

Food Waste Disposal Lite

Accessory

348.00 Retail

0.00

0.00

0.00

0.00

0.00

Waste Disposals

Waste Disposer

☐

456439

Food Waste Disposal Medium

Accessory

508.00 Retail

0.00

0.00

0.00

0.00

0.00

Waste Disposals

Waste Disposer

☐

456440

Food Waste Disposal Max

Accessory

568.00 Retail

0.00

0.00

0.00

0.00

0.00

Waste Disposals

Waste Disposer

☐

Detail

Images

Links

Spec

Comments

Accessories

Stock

Properties

Promotions

Info

Statistics

452613

Supra 400-U 1 Bowl Undermount Sink, Universal

Specification

[Scope of supply]
Undermount bowl with 3 1/2" basket strainer Waste, overflow and Topper Waste cover.
Fixing kit 212 330 included

[Design tips]
Cabinet Width: 45 cm
Bowl depth: 175 mm

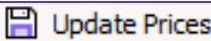
Update Prices

Entering an individual discount against an item

Find the item you require (you can either type the product code into the box on the left or use the filter list option to narrow the list of products down) and enter the discount you receive in **Selling Disc%**. Enter the margin you wish to make in **Selling Margin%**.

Code	Description	Option Colour	Group	Catalogue Price	Selling Price	*Selling Disc%	*Selling Margin%	Cost Price	Cost Disc%	Disc Group	Product Type
450927	Universal Odour Trap	Accessory		24.00 Retail	0.00	0.00	0.00	0.00	0.00		Accessories
450929	Double Bowl Connection Kit	Accessory		28.33 Retail	0.00	0.00	0.00	0.00	0.00		Accessories
450930	Tap Hole Cover, 43mm Diameter	Stainless Steel		9.99 Retail	0.00	0.00	0.00	0.00	0.00		Accessories
450938	Converter Metric To 1 1/2" Waste	Accessory		1.24 Retail	0.00	0.00	0.00	0.00	0.00		Accessories
452613	Supra 400-U 1 Bowl Undermount Sink, Universal	Stainless Steel	BL	148.00 Retail	0.00	30.00	40.00	0.00	0.00		Sinks
452614	Supra 450-U 1 Bowl Undermount Sink, Universal	Stainless Steel	BL	168.00 Retail	0.00	0.00	0.00	0.00	0.00		Sinks
452615	Supra 500-U 1 Bowl Undermount Sink, Universal	Stainless Steel	BL	188.00 Retail	0.00	0.00	0.00	0.00	0.00		Sinks
453634	Dinas 65 Sink	Stainless Steel		198.00 Retail	0.00	0.00	0.00	0.00	0.00		Sinks

Click **Update Prices**.



Entering a specific price against an item

Find the item you require and enter its cost and selling price. All prices here are excluding VAT. Note that if you specify a cost price in this screen, EQ will not apply the default margin to this item as you are overriding this method of pricing by using individual product prices. You will therefore also need to specify your selling price as well. Click **Update Prices**. Note that products using specific prices will not receive any automatic price updates.

Hints and Tips

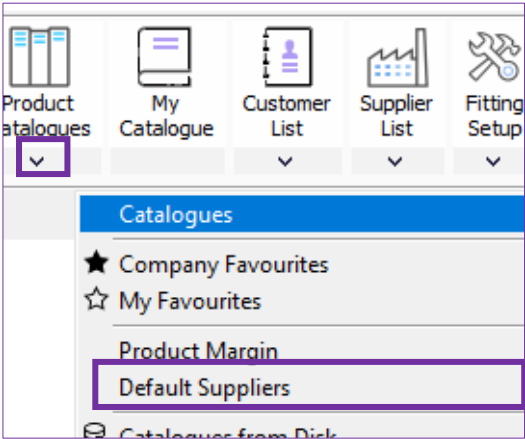


You can export the list of products into Excel, make any amendments in here, and import back in again if you have a lot of products within a catalogue that require this level of discount.

Setting Default Suppliers

If you have downloaded catalogues from multiple suppliers, you may find that you need to change the default supplier for one or more catalogues. The default supplier is the supplier that EQ will use when you are searching within catalogues for your products. You will only be able to see products from the default supplier, unless an alternative supplier has got products in their catalogue that are not available from the default supplier.

From the **Product Catalogues** drop-down arrow, click **Default Suppliers**.



This will open a window that allows you to select which suppliers you want to set as the default for each of your catalogues. Note that where the supplier's name is in a grey background, you only have the catalogue loaded from that one supplier. In the example below, the Neff catalogue's default supplier is white, meaning we have a choice of suppliers.

Default Product Suppliers				
Ref	Manufacturer	Catalogue	Own Name	Default Supplier
4183	Abacus Bathrooms	Abacus Bathrooms		Abacus Direct
2461	Adamez	Adamez		Adamez UK Ltd
2000	Ancillaries	Ancillary Items		Miscellaneous Products
8051	Aquella Brassware	Aquella Brassware		Aquella Brassware Ltd
1042	Belling Appliances	Belling Appliances		Waterline Blue Book
8788	Blanco Essentials	Blanco Essentials		Blanco UK Limited
8789	Blanco Inspirations	Blanco Inspirations		Blanco UK Limited
2010	Blanco Unit Workbook	Blanco Unit Workbook		Blanco UK Limited
1043	Bosch Built In	Bosch Built In		Waterline Blue Book
2089	Bosch Freestanding	Bosch Freestanding		Waterline Blue Book
6245	Cabinet Vision	Cabinet Vision		Cabinet Vision
3568	Carron Freestanding	Carron Freestanding		Waterline Blue Book
1380	Caple Appliances	Caple Appliances		East Coast Fittings Limited
1377	Caple Sinks	Caple Sinks		East Coast Fittings Limited
2454	Caple Taps	Caple Taps		East Coast Fittings Limited
2755	Carron Phoenix	Carron Phoenix		Waterline Blue Book
8184	Carron Phoenix Value Deals	Carron Phoenix Value Deals		Waterline Blue Book
1076	Consort	Consort		Waterline Blue Book
7806	Crown Bedrooms +Lifespace 2021	Crown Bedrooms +Lifespace 2021		Waterline Blue Book
7807	Crown Bedrooms Components	Crown Bedrooms Components		Waterline Blue Book
7779	Crown Imperial 2021	Crown Imperial 2021		Waterline Blue Book
8785	Crown Imperial Bedrooms	Crown Imperial Bedrooms		Waterline Blue Book
7760	Crown Imperial Components	Crown Imperial Components		Waterline Blue Book

Click the catalogue for which you wish to change the default supplier and click on the supplier's name on the right-hand side. This will then turn into a drop-down and allow you to select your default supplier for that catalogue.

4534	Astracast	Astracast	J & J Ormerod Plc
1042	Belling Appliances	Belling Appliances	Waterline Blue Book
5664	Book Of Bedrooms Colonial 2017	Book Of Bedrooms Colonial 2017	J & J Ormerod Plc
1043	Bosch Built In	Bosch Built In	Waterline Blue Book
2089	Bosch Freestanding	Bosch Freestanding	Waterline Blue Book

Click **Update** to save your preferences.

Checking your Prices

Finding Products



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

Enter the code into the code box at the top left on the screen or click the search button and choose from one of the methods below. To search for a product, click on the left-hand side. This opens your product locator and allows you to search through your database using the below methods.

Code

All Products

Abacus Bathrooms

Adamsez

Ancillary Items

Aqualla Brassware

Belling Appliances

Blanco Essentials

Blanco Inspirations

Blanco Unit Workbook

Bosch Built In

Bosch Freestanding

Advanced Search

Type

Category

Range

Option

Specification

Height

Width

Depth

=

0

=

0

=

0

Reset

Code	Description	Manufacturer	Range	H	W	D	Supplie
5AV10001/	Front infill panel, height 81 Blaupunkt, 5AV10001	Hacker Classic 2020 II					
5AV10002/	Front infill panel, height 81 Blaupunkt, 5AV10002	Hacker Classic 2020 II					
5AV10011/	Front infill panel, height 86 Blaupunkt, 5AV10011	Hacker Classic 2020 II					
5AV10022/	Front infill panel, height 86 Blaupunkt, 5AV10022	Hacker Classic 2020 II					

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

Code

191

All Products

Abacus Bathrooms

Adamsez

Ancillary Items

Aqualla Brassware

Belling Appliances

Blanco Essentials

Blanco Inspirations

Blanco Unit Workbook

Bosch Built In

Bosch Freestanding

Advanced Search

Type

Category

Range

Option

Specification

Height

Width

Depth

=

0

=

0

=

0

Reset

Code	Description	Manufacturer	Range	H	W	D	Supplie
1912AB	Phoenix 3-In-1 Hot Tap 'C' Spout Tank/Filter - Aged Brass - 1912-AB	Perrin & Rowe	Phoenix				1912-
1912BR	Phoenix 3-In-1 Hot Tap 'C' Spout Tank/Filter - Polished Brass - 1912-BR	Perrin & Rowe	Phoenix				1912-
1912BZ	Phoenix 3-In-1 Hot Tap 'C' Spout Tank/Filter - Bronze - 1912-BZ	Perrin & Rowe	Phoenix				1912-

Type any part of the product description into the Advanced Search box.

Code

All Products

Abacus Bathrooms

Adamsez

Ancillary Items

Aqualla Brassware

Belling Appliances

Blanco Essentials

Blanco Inspirations

Blanco Unit Workbook

Bosch Built In

Bosch Freestanding

Cabinet Vision

Cannon Freestanding

Caple Appliances

Casle Sink

Advanced Search

mixer

Specification

Height

Width

Depth

=

0

=

0

=

0

Reset

Code	Description	Manufacturer	Range	H	W	D	Supplie
BRS00101	Regent Basin Monobloc Mixer - Chrome	Utopia Sanitaryware & Tap	Regent				
BRS00103	Regent Three Hole Basin Mixer - Chrome	Utopia Sanitaryware & Tap	Regent				
BRS00104	Regent Three Hole Wall Mounted Basin Mixer - Chrome	Utopia Sanitaryware & Tap	Regent				
BRS00105	Regent Tall Basin Monobloc Mixer - Chrome	Utopia Sanitaryware & Tap	Regent				
BRS00110	Regent Bath Shower Mixer - Chrome	Utopia Sanitaryware & Tap	Regent				
BRS00111	Regent Freestanding Bath Shower Mixer With Standpipes - Chrome	Utopia Sanitaryware & Tap	Regent				

Select the **Catalogue** on the left-hand side, then use the **Type** and **Category** drop down menus and select the relevant options from the lists.

Code	Description	Manufacturer	Range	H	W	D	Supplie
HHF1138A0B	Series 2 Single Oven - Black	Bosch Built In	Series 2	595	594	548	
HHF1138R0B	Series 2 Built-In Single Oven - Stainless Steel	Bosch Built In	Series 2	595	594	548	
HBG7341B1B	Series 8 Single Oven - Black	Bosch Built In	Series 8	595	594	548	
HBG7741B1B	Series 8 Single Pyrolytic Oven - Black	Bosch Built In	Series 8	595	594	548	
HBG7764B1B	Series 8 Single Pyrolytic Oven - Black	Bosch Built In	Series 8	595	594	548	

Select the **Catalogue** on the left-hand side, then use the **Range** and **Option** drop down menus. This is particularly useful when searching for bathroom products, or sinks and taps, within a specific range.

Code	Description	Manufacturer	Range	H	W	D	Supplie
BFL523MB0B	Serie 4 Microwave - Black	Bosch Built In	Serie 4	382	594	317	
BFL553MB0B	Serie 4 Microwave - Black	Bosch Built In	Serie 4	382	594	320	
NBS533B80B	Serie 4 Built Under Double Oven - Black	Bosch Built In	Serie 4	717	594	550	
CMA583MB0B	Serie 4 Compact 45cm Microwave Combination Oven - Black	Bosch Built In	Serie 4	455	594	570	

Select the **Catalogue** on the left-hand side and type any part of the product specification into the **Specification** box. This can be used in conjunction with the Type & Category or the Range & Colour searches.

Code	Description	Manufacturer	Range	H	W	D	Supplie
KGE49AICAG	Serie 6 201x70cm, LowFrost 70cm/30 Fridge Freezer, VitaFresh - Stainless Steel Bosch Fr	Bosch Fr	Serie 6	2010	700		
KGE49AWCAG	Serie 4 201x70cm, LowFrost 70cm/30 Fridge Freezer, VitaFresh - White	Bosch Freestanding	Serie 4	2010	700		
KGV336WEAG	Serie 4 176 x 60cm LowFrost 50/50 Fridge Freezer, VitaFresh - White	Bosch Freestanding	Serie 4	1760	600		
KGV33VLEAG	Serie 4 176 x 60cm LowFrost 50/50 Fridge Freezer, VitaFresh - Stainless Steel Bosch Freestand	Bosch Freestand	Serie 4	1760	600		

Type in **Flexible Dimensions**. This is particularly good when looking for items with a specific size such as doors or panels. This

Code	Description	Manufacturer	Range	H	W	D	Supplie
BD60	600mm Drawerline Base Unit	EQ Kitchens		720	600	560	
BH60	600mm Highline Base Unit	EQ Kitchens		720	600	560	
D60/2	600mm 2 Pan Drawer Pack	EQ Kitchens		720	600	560	
TMAH/1	600mm Medium Height Tall Appliance Housing	EQ Kitchens		1920	600	560	

can be used in conjunction with Catalogue and/or Type & Category.

- = Equals - Finds product with dimensions that **match** the entered size
- < Less than - Finds products with dimensions **below** the entered size
- > Greater than - Finds products with dimensions **above** the entered size
- <> Doesn't Equal - Finds product with dimensions that **do not match** the entered size

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

Code

ECF Austerhouse Doors ED02.1
ECF Barnsdale Doors ED03
ECF Components ED19
ECF Edged Doors ED12
ECF Gaddesby Bathrooms
ECF Gaddesby Kitchens ED15
ECF Goscote Doors ED15.1
ECF Greyhouse Bathrooms
ECF Hoxton Doors 2019
ECF Hoxton Doors ED02
ECF Hoxton MTM Doors 2019
ECF Mitre Framed Doors 2018
ECF Rigid Superior Cabinets
ECF Superior Cabinets ED03
ECF Volante Sliding DoorsED7
ECF Volpi Kitchens ED06
EQ Bathrooms
EQ Bedroom Carcases
EQ Bedroom Carcases CB
EQ Bedrooms
EQ Doors
EQ Doors CB
EQ Kitchen Carcases
EQ Kitchen Carcases CB
EQ Kitchen Complete CB
EQ Kitchens
Eco Sanitaryware
Essentials

Advanced Search

Type

Category

Range

Option

Specification

Height

Width

Depth

Reset

Code	Description	Manufacturer	Range	H	W	D	Supply
BD60	600mm Drawerline Base Unit	EQ Kitchens		720	600	560	
BH60	600mm Highline Base Unit	EQ Kitchens		720	600	560	
D60/2	600mm 2 Pan Drawer Pack	EQ Kitchens		720	600	560	
TMAH/1	600mm Medium Height Tall Appliance Housing	EQ Kitchens		1970	600	560	

Detail

Images

Links

Spec

Comments

Accessories

Stock

Properties

Promotions

Info

Statistics



BD60

600mm Drawerline Base Unit

EQ Furniture

Specification

£60.03 - £69.28

Live Search

Select Product

Price Guide

↑

☆

☆

📄

📊

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



Product Pricing Information

Base Price - 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.

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

Selling Price - is the price of this item to your customers.

The screenshot shows a software window titled "Product Pricing Information". It has a left-hand navigation pane and a main right-hand area. The left pane contains a tree view under "Product Details":

- Product Details
 - Manufacturer/Catalogue
 - Ed Kitchens
 - Version:0.00
 - Supplier
 - Product
 - BD60
 - 600mm Drawerline Base Unit
 - /

The right-hand area displays "Standard Pricing Details" with a table:

Standard Pricing Details
Base Price
\$NA
Cost Price
\$3.00
Unit Price

Below the table, there is a 3D model of a white cabinet unit. To its right, the text reads:

BD60
600mm Drawerline Base Unit

Below this is a "Specification" section, which is currently empty. The window has standard Windows-style window controls (minimize, maximize, close) in the top right corner.

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

Click **OK** to close this window.

Printing Product Information

Select a product within your database and click the **Print** icon at the bottom right hand side of the window.

Code

Advanced Search

Specification

Reset

All Products

1909 Complete 2025

A&H Carcase 2023

Ancillary Items

Appliance Demo 2023

Aqualisa

Belling Appliances

Blanco Essentials

Blanco Inspirations

Blanco UK Ltd

Bosch Built In

Bosch Freestanding

CDA

Ca Pietra

Caple Sinks

Caple Taps

Carron Phoenix

Carron Phoenix Value Deals

Chippendale 2024

Chippendale Components

Clearwater Baths

Colourhill Complete

Colourhill Doors

Colourhill Kitchens & Bedrooms

Crosswater Brassware

Crosswater Essentials

Crosswater Furniture & Ceramic

Crosswater Showering

☒ Live Search

Type

Sinks

Height

=

0

Category

Composite 1.5 Bowl

Width

=

0

Range

Adira

Depth

=

0

Option

Anthracite

Code	Description	Manufacturer	Range	H	W	D	Supplie
527602	Adira 6S Reversible Silgranite Inset Sink With Pop Up Waste - Anthracite	Blanco UK Ltd	Adira	425	1264	616	

Detail

Images

Links

Spec

Comments

Accessories

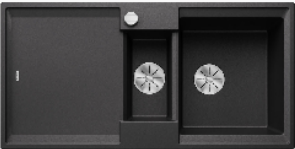
Stock

Properties

Promotions

Info

Statistics



527602

Adira 6S Reversible Silgranite Inset Sink With Pop Up Waste

Blanco UK Limited

Specification

£657.60

☒ Select Product

☐ Price Guide

Print

Select whether you want to print, preview, or turn the document into a PDF to attach to an email.

Printing Options



Quotation

Printer

WINNER PDF-EXPORT

Printers

Copies

1

Properties

☐ Archive Document

☐ Open PDF after Creation

☒ Preview

☐ Print

☐ PDF

☐ Email PDF

☐ HTML

Hints and Tips



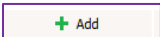
Use the Print Preview to see what your logo will look like at the top of your documents

Adding your Own Suppliers

Most of your suppliers' catalogues are available to download from the EQ server, however, there will be occasions whereby you will need to add your own products (see **My Catalogue**), and your own suppliers, into EQ for those that aren't available to download.

To add your own suppliers, open the **Supplier List** screen using the icon on your top toolbar.



Click at  the bottom. This opens a blank general tab. Fill in the details as required.

You may want to click across each of the tabs at the top to fill in additional information relating to that supplier. Enter your account code with that supplier in the first box on the Account Details tab.

Once you have finished, click **Update** to save your work.

The supplier will now be in the list, allowing allocation of products, orders and purchase invoices (Pro Only) to it.

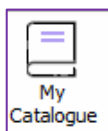
Important Note for EQ Professional users

If you are planning on exporting Purchase Invoices to an accounts package, you will also need to complete the Accounts Code box with the account number for each supplier as assigned within your accounting software. You will also need to assign a default VAT Code/Rate, and Nominal Code. Please see the relevant help files for more information.

Adding your Own Products (My Catalogue)

My Catalogue is your own product database for items that cannot be downloaded from the EQ Server, or for items that you don't want to download that you want to be able to put onto a quote. These can include items that don't have a fixed price, such as solid surfaces, or items that are specific to you.

Please note that EQ **does not** update these prices automatically for you.



To add an item, click **My Catalogue** on the top toolbar. Click the **Product Details** tab, and then the pop-up box next to the catalogue drop down.

A screenshot of the 'My Catalogue' interface. On the left, there's a 'Find' section with a 'Code' dropdown and a search box, and a 'Filter List' button. The main area has tabs for 'List', 'Product Details', and 'Additional Info.'. The 'Product Details' tab is active, showing a 'Details' section with a 'Catalogue' dropdown (set to 'Random Supplier'), a 'Code' field (set to 'WKP'), and a 'Description' field (set to 'TBC Worktop'). A small pop-up box is visible next to the 'Catalogue' dropdown.

This opens a window and allows you to **add** in sub-catalogues, such as solid surfaces, tiles, bar stools etc.

For each of these you can, should you wish to, set rules using the **Settings** button on the right – set the same supplier, and the same discount OR margin against any products that you allocate against these catalogues.

Click **Update**.

A screenshot of the 'Own Catalogues' window. It has a title bar 'Own Catalogues' and a close button. Inside, there's a table with 'Catalogue Title' as the header. The table lists several categories: 'Bedroom Furniture', 'Bespoke Items', 'Extra Charges', 'Living Room Furniture', 'Orphaned Stock Records', 'Other', 'Stocked Accessories', and 'Tiles'. To the right of the table are buttons for '+ Add', 'Delete', and 'Settings'. At the bottom right is an 'Update' button.A screenshot of the 'My Catalogue' interface, identical to the one above, showing the 'Product Details' tab with the 'Catalogue' dropdown, 'Code' field, and 'Description' field.

You should now be back to the main **My Catalogue** window. Click the **Add** icon at the bottom. Fill in the details as required, starting at the top and working your way down. Note that you will need to choose a supplier for your product before you can update it. All prices are EXCLUDING VAT.

Pro Only – click the **Additional Info** tab at the top for more options.

Once you have finished, click **Update**. Your product is now saved ready for use.

Hints and Tips



You can import products from an Excel spreadsheet to save time for multiple products.

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.

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**.

Changing Auto Numbering (for Stand-Alone Systems)

IMPORTANT – DO NOT CHANGE ONCE SYSTEM IS IN USE.

From **System Config**, under **System** select **Auto Numbering**. ON ONE MACHINE ONLY, change the **Order & Customer Prefix**. It can be whatever you want it to be, up to 5 characters in length.

Once you have finished, click **Update**.

Configuring Email Settings

These will be your default settings, but they can also be configured on a user-by-user basis so that each user can send emails out of their own email address.

From **System Config**, under **System**, select **Email**.

Send via Outlook (MAPI) - Tick this box if you want EQ to use Microsoft Outlook to send messages. This will keep a copy of the messages in Outlook's **Sent Mail** folder.

Email Purchase Orders - Tick the box to enable the option.

User Information:

Email Address - Enter your email address, this appears as the "from" address when the supplier receives your message.

Cc Email Address - Enter an email address in here if you want to receive a copy of the order. This can be your email address again or another department's address.

Login Information:

Username - This must be the username for your email service provider. You can probably find this in your normal email program or from your service provider.

Password - This is the password for your email server. If you do not know this obtain the password from your email service provider.

Server Information:

Outgoing Mail (SMTP) - Enter your outgoing mail server. This can be found in your normal email program or from your service provider. E.g. this could be mail.providename.com

Port - Enter the port that is required by your outgoing mail server. This can be found in your normal email program or from your service provider. Many internal email servers use port **25**, whilst many SSL email providers (Google Mail being an example) use **587**.

Requires SSL Authentication - Tick if advised that it is required by your email server. It is relevant to how you log on to your email server.

(Note you can also setup per user email account settings (so not all emails appear from the same address).

See **System Config > Users > Additional Info > Email**.

Send Sample Email

Once you have input the settings click **Update** to save and close the window, then close EQ completely. Log back in with your password (if this has been configured) BEFORE you use the **Send Sample** button. Once you are back into EQ return to **Tools > Email** to send a sample message.

Click the button and input any email address that you can receive email from, so you can verify the test is received correctly.

Hints and Tips



- Remember to close EQ and reopen for changes to take effect
- Note that you cannot link to Outlook if it has been installed as a 64-bit application, it would need to be re-installed as 32-bit so it can be linked with EQ. For more information see the system requirements on our website.
- When using the option with Outlook/Outlook Express you may be prompted to click **Continue** as Outlook warns you that an external program (EQ in this case) is attempting to send email. You must allow this.
- If you experience any other error messages sending with Outlook/Outlook Express remove the tick box and try sending an email message from EQ without using Outlook.
- Google Users may have to allow less secure apps within their account settings
- Windows 365 users may have to log into their email account from the internet, rather than from Outlook, for changes to take effect.
- See further help and short videos, guiding through Google and Microsoft accounts in our Support Centre [Email setup article](#).

Configuring Validation Rules

Validation rules are warning messages that appear when a quotation is saved. They are in 2 forms: Warnings, which can be ignored, and errors, which require the user to take some action in order to continue to save the Quotation. They can be set differently for different types of quotation.

From the **System Config**, under **Quotations & Pricing** click **Validation Rules**.

System Configuration

Quotation Validation Configuration

Quote Type	Default	Quick Quote
Kitchen	☒	☐
Kitchen + Utility	☐	☐
Utility	☐	☐
Study	☐	☐
Bathroom	☐	☐
Bedroom	☐	☐
Quick Quote	☐	☒

Add Delete

Validation Rules [Kitchen]	Full Order	Remedial	Add On
100001Handing Not Specified	☒	☒	☒
100002No Cost Price Entered	☒	☒	☒
100003No Fitting Details	☒	☒	☒
100004Mismatched Doors	☒	☒	☒
100005Mismatched Door Accessories	☒	☒	☒
100006Have you forgotten [100007Worktops]	☒	☒	☒
100006Have you forgotten [100008Sinks]	☒	☒	☒
100006Have you forgotten [100009Appliances]	☒	☒	☒
100006Have you forgotten [100010Handles]	☒	☒	☒
100006Have you forgotten [100011Plinth]	☒	☒	☒
100006Have you forgotten [100012Cornice/Pelmet]	☒	☒	☒
100006Have you forgotten [100013Hinges]	☐	☐	☐
Missing Door/Drawer Front	☐	☐	☐

Add Edit Delete

Update

Here you can add or amend Quote types and set the validation rules accordingly. The bottom table is relevant to whichever quote type you have selected in the top table.

Click **Add** under the top table to add in additional Quote Types. Give your Quote Type a name and if you DON'T want it to contain Fitted Furniture, click "Quick Quote".

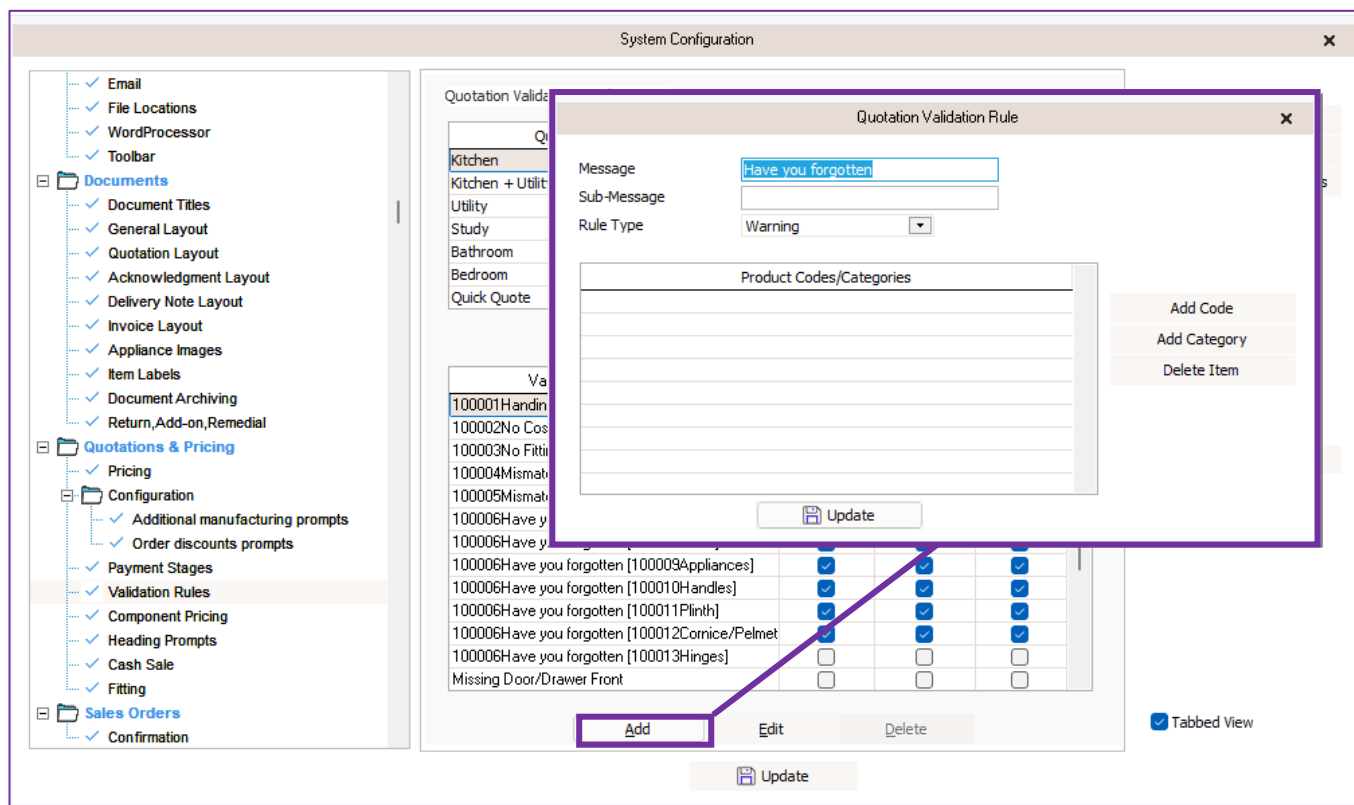
With your **Quote Type** selected in the top table, choose which rules you wish to apply in the bottom table. You can add additional rules by clicking Add and selecting whether you want a **Warning** or an **Error**, and whether you want EQ to prompt for specific codes, or an entire product category.

Quotation Validation Configuration

Quote Type	Default	Quick Quote
Kitchen	☒	☐
Kitchen + Utility	☐	☐
Utility	☐	☐
Study	☐	☐
Bathroom	☐	☐
Bedroom	☐	☐
Quick Quote	☐	☒

Add Delete

This can be very useful for adding in reminders for certain items. If you set the rule to be an error, EQ will not allow the Quotation to be saved unless that item has been added to a quote. If you add multiple options under the same rule, EQ will look for 1 of them, not all of them. If you wish to configure validation rules for separate products, then you must configure a separate validation rule for each product. So, for example, if you wanted to prompt users to add radiator valves AND wastes to a bathroom quote, you would need 2 separate rules, 1 for each product/category. Alternatively, if you wanted EQ to prompt for radiator valves OR wastes, then you could put both products/categories under the same rule.



Click update to save your changes. This will add the rule to the list, you now must select which quote types will utilise this rule.

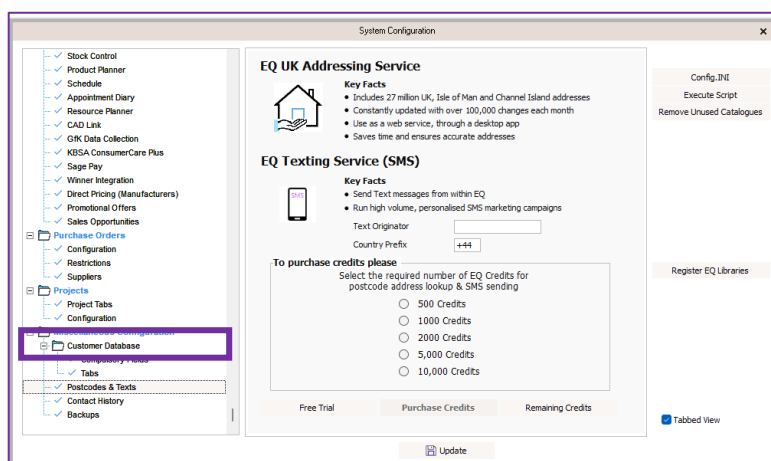
Configuring Text Originator & Purchasing Credits

If you wish to send text messages from within EQ, you will need to configure your Text Originator, and purchase your credits.

From the **System Config**, under **Miscellaneous Configuration**, click **Postcodes & Texts**.

Enter your Text Originator in the box on the right – this can be characters, if you want to enter your company name in there, or a real phone number that you own if you want customers to be able to respond to the texts (omit the first “0”, as this will be replaced by your Country Code in the box below). For first-time configuration, you can sign up for a free trial of 10 credits by clicking the Free Trial button & filling the information in.

Once you have used your free credits, you will need to purchase more to continue using this feature. Click Purchase Credits and follow the instructions on screen. You can come back to this window at any time and click Remaining Credits to see how many you have left.



Adding your Logo

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

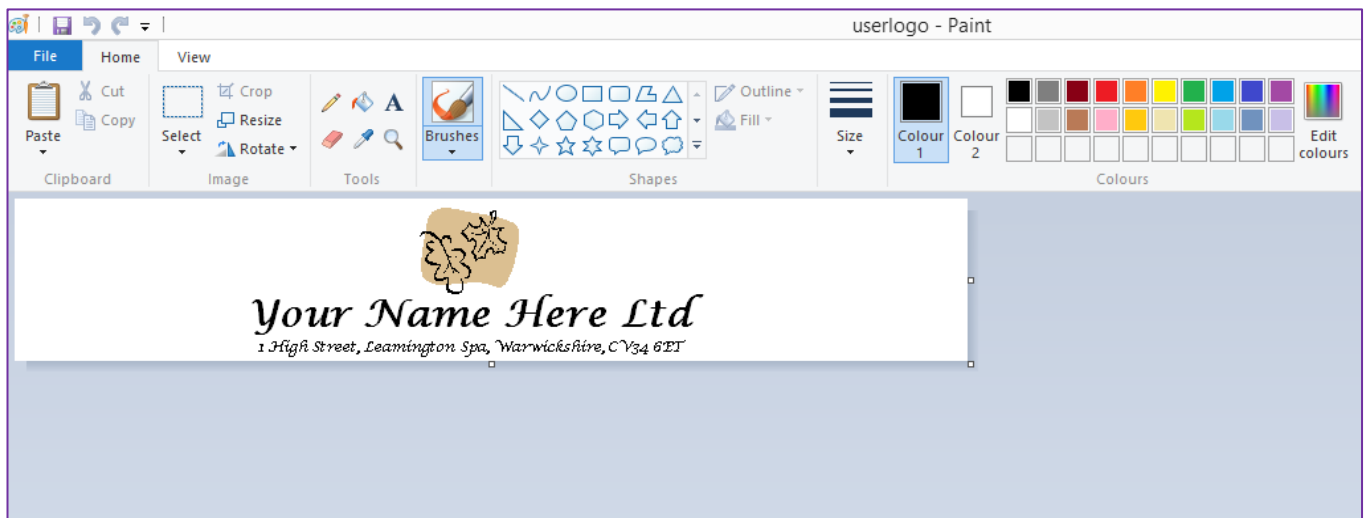
Part 1

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

You can follow step-by-step video instructions in the [Support article Show Company logo](#).

Hints and Tips



For networked multi-user systems, save this file in a networked location and allocate on a user-by-user basis – see **Configuring User Settings** for more info.

Configuring User Settings

Anybody that uses EQ will need to be set up with a **Username** and **Password** and will need to be given access rights to allow all access or limit the functionality available to users.

Part1 – Configure Users

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



This opens a screen that allows you to add users to your system.

[illegible]

- Customise
- CAD Settings
- Users**
- User Groups
- Registration Settings

By default, there are two users, the

Administrator and a blank user.

For first time set-up, select the **Administrator** user and change it to your own name. Give yourself a password in the next box across. You will need this the next time you log into EQ.

In the blank user field, type the name of another person that will be using EQ, and give them a *DIFFERENT* password to your own.

Note that passwords must be unique to each user.

In the **Order Prefix** column, you can put the user's initials if you wish. This will then prefix all quotes produced by that user with these letters instead of your **Default Order Prefixes**.

You can add additional users by clicking **Add** at the bottom and entering the relevant information. If you are the only user of your system, highlight the blank line and click Delete.

You may then want to configure additional settings for each user. This can be done by selecting the user and clicking **Additional Info** on the right-hand side. Here, you can set user-specific addresses, delivery addresses, email settings (so users can email out of their own accounts instead of using the default settings), logo, minimum margin etc.

Click **Update** to save and close.

- Reset User
- Reset All Users
- Administrator
- Duplicate
- Signatures
- Additional Info**
- User Groups

Hints and Tips

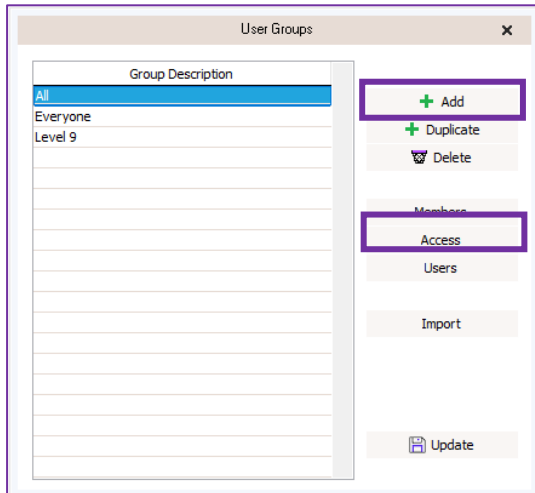
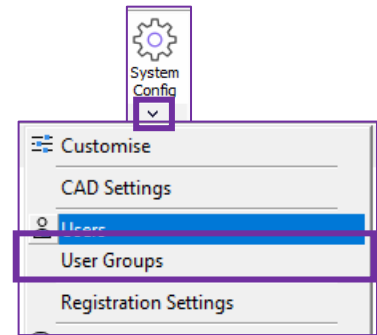


Ensure your key user is set as the administrator so that they have full access rights and also receive the catalogue update notifications. Click on your key user's name and click **Administrator** on the right.

Part 2 – Add Users to Access Groups

Click the **System Config** drop-down arrow from the main menu bar and select **User Groups**. These are your access groups, allowing you to restrict users' functionality within the software.

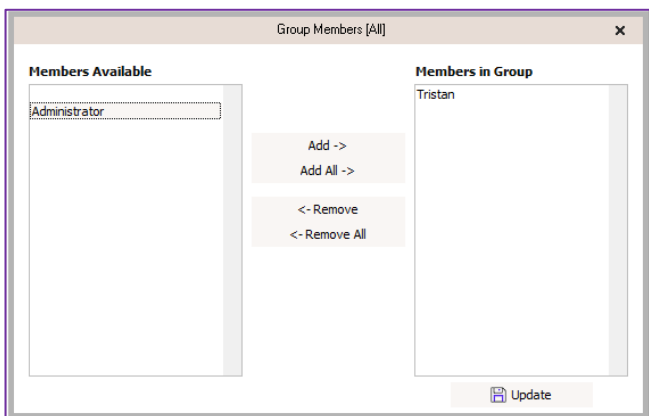
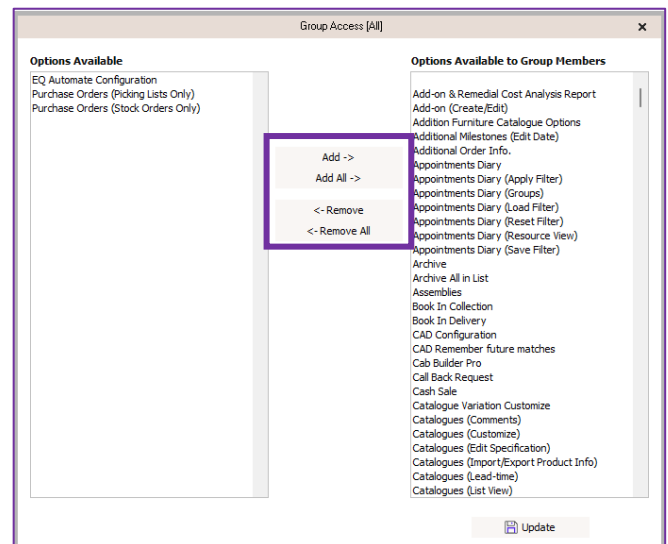
By default, there are two groups: **Everyone** and **Level 9**.



You can add additional access groups by clicking **Add** on the right-hand side. Give your group a name and then click **Access** on the right.

This gives you a list of functionalities – those which members DO NOT have access to, on the left, and those which they DO, on the right. To enable a functionality for group members, highlight it on the left and click **Add**. To remove a functionality, highlight it on the right and click **Remove**.

Click **Update** to save and close.



Back in the **User Groups** screen, select a group and click **Members** on the right (you won't be able to do this if you've got the **Everyone** group selected as this always contains all users). Select a user you wish to add into this group on the left and click **Add**, to add them into this access group. Click **Update** to save and close.

Remember to click **Update** in the **User Groups** screen to save your settings.

Hints and Tips



Restrict the **Everyone** group to a basic level of access settings. All users will have at least this level of access.

Backing Up your Data

It is strongly recommended to back up your data regularly. There are two ways of doing this; Method 1 will back up all the work you do within EQ excluding catalogues, information contained within customer folders and any bespoke templates/letters you have created. Method 2 will effectively duplicate your system but will take much longer. EQ will prompt you periodically to back your data up using method 1.

Method 1 – Internal Back-Up

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.)

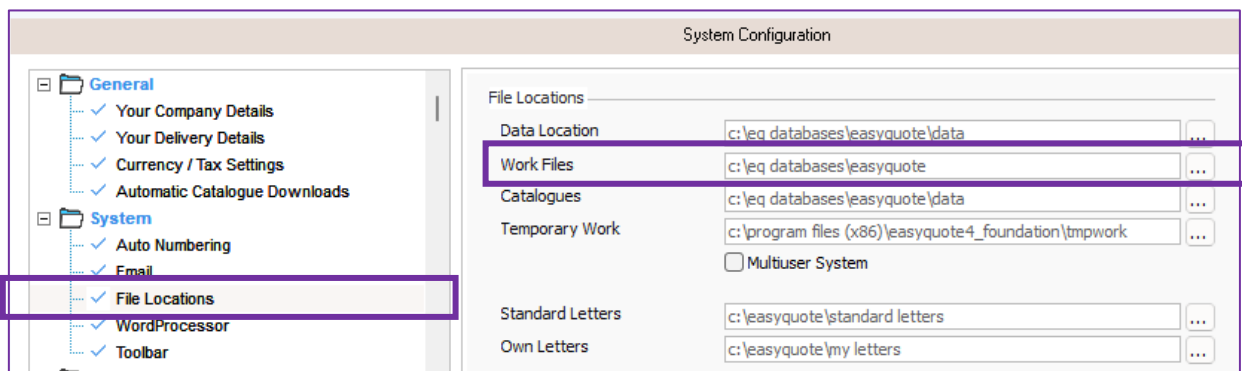
Click **Backup**.

This will need to be completed independently within each multicompany, should you have any configured.

Method 2 – Full System Duplication

Ensure all users are logged out of the system. Find your **easyquote** folder, which may be located on the C:\ drive, or somewhere else on your network.

If you are unsure of where this folder is located, click the **System Config** button and under **System** click **File Locations**. Make a note of the network path for **Work Files**. DO NOT MAKE ANY CHANGES IN THIS SCREEN.



Close this off, close EQ completely and browse to this folder.

Locate this folder, right-click and select **Copy (DO NOT CUT)**. Browse to another location (for example, an external hard drive), and **Paste** this folder into the 2nd location. This will take some time to copy all of the files across as this folder contains your entire database. This may need to be repeated if you have any multicompanies whereby the data is NOT contained within your main Easyquote folder. Please be advised that this does not enable you to use EQ on another machine without having first purchased an additional licence – please speak to our Sales Team if you require any further licences.

Hints and Tips



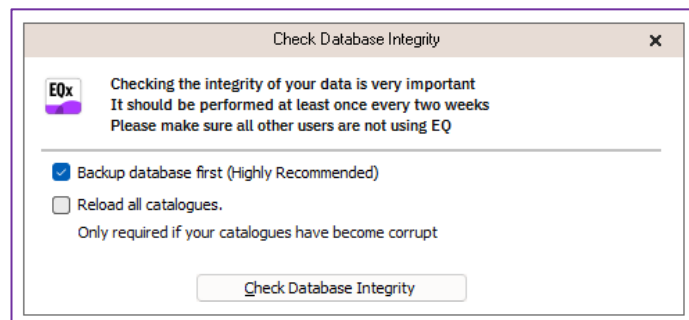
For multiple standalone systems, **Method 2** is a good way of duplicating the settings from one machine to a 2nd or 3rd machine. Just make sure that you change the **Auto Numbering** and user specific **Order Prefixes** (if used) between each machine in case you ever wish to combine the data.

Database Integrity Check

In addition to performing regular backups, it is strongly recommended for you to perform a database integrity check on a regular basis to keep your system running as efficiently as possible. You will need all users logged out to perform a database integrity check.

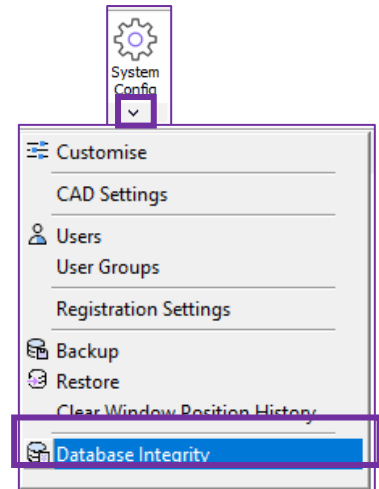
Click the **System Config** drop-down arrow from the main menu bar and select **Database Integrity**.

You will be asked if you wish to perform a backup (utilising Method 1, and whether you wish to reload all catalogues. Select the relevant options and click **Check Database Integrity**.



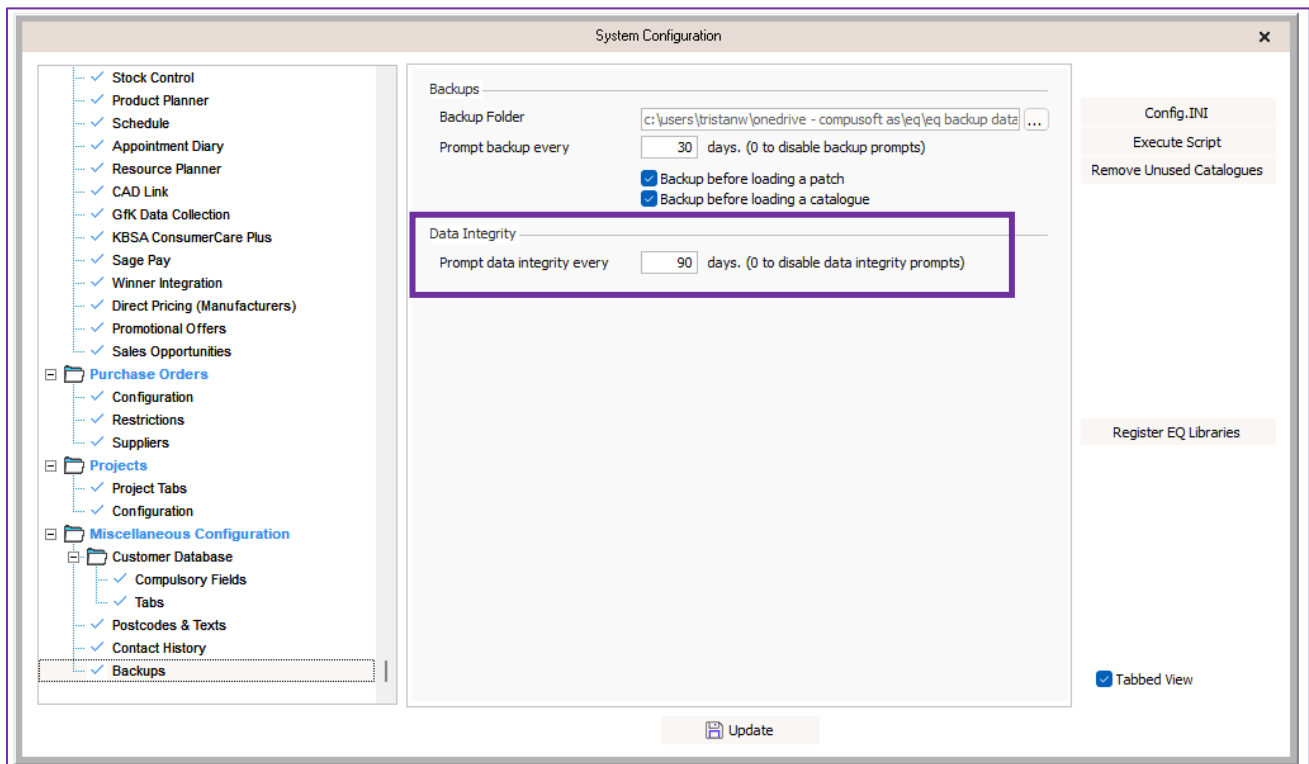
The 'Check Database Integrity' dialog box contains the following elements:

- EQx logo**
- Message:** "Checking the integrity of your data is very important. It should be performed at least once every two weeks. Please make sure all other users are not using EQ."
- Options:**
 - ☒ Backup database first (Highly Recommended)
 - ☐ Reload all catalogues. Only required if your catalogues have become corrupt
- Button:** "Check Database Integrity"



EQ will run through a backup (if you had selected that option) and will then ask you if you wish to continue with the database integrity check. Click yes and wait for the process to complete. Once the progress bar has disappeared, all users can log back into EQ.

Your Administrator will be reminded every X days to perform a database integrity check if none have been completed within that timeframe. This setting can be changed in the **System Config** under **Miscellaneous Configuration > Backups**

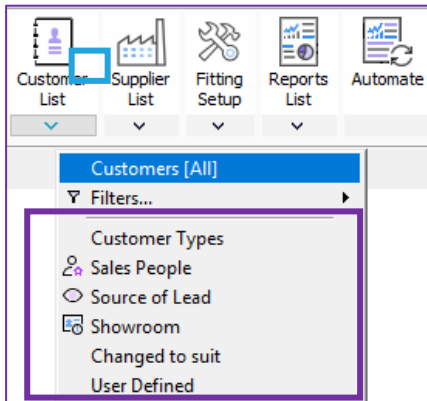


The 'System Configuration' window shows the following settings:

- Left Panel (Tree View):**
 - Stock Control
 - Product Planner
 - Schedule
 - Appointment Diary
 - Resource Planner
 - CAD Link
 - GfK Data Collection
 - KBSA ConsumerCare Plus
 - Sage Pay
 - Winner Integration
 - Direct Pricing (Manufacturers)
 - Promotional Offers
 - Sales Opportunities
 - Purchase Orders
 - Configuration
 - Restrictions
 - Suppliers
 - Projects
 - Project Tabs
 - Configuration
 - Miscellaneous Configuration
 - Customer Database
 - Compulsory Fields
 - Tabs
 - Postcodes & Texts
 - Contact History
 - Backups** (selected)
- Backups Section:**
 - Backup Folder: c:\users\tristanw\onedrive - compusoft as\eq\eq backup data
 - Prompt backup every: 30 days. (0 to disable backup prompts)
 - ☒ Backup before loading a patch
 - ☒ Backup before loading a catalogue
- Data Integrity Section (highlighted):**
 - Prompt data integrity every: 90 days. (0 to disable data integrity prompts)
- Right Panel:**
 - Config.INI
 - Execute Script
 - Remove Unused Catalogues
 - Register EQ Libraries
- Bottom:** Update button, Tabbed View checkbox (checked)

Configuring Customer Classifications

You may wish to configure Customer classifications for reporting and filtering purposes. Click the **Customer List** drop-down arrow from the main menu bar and select and work down the following list:



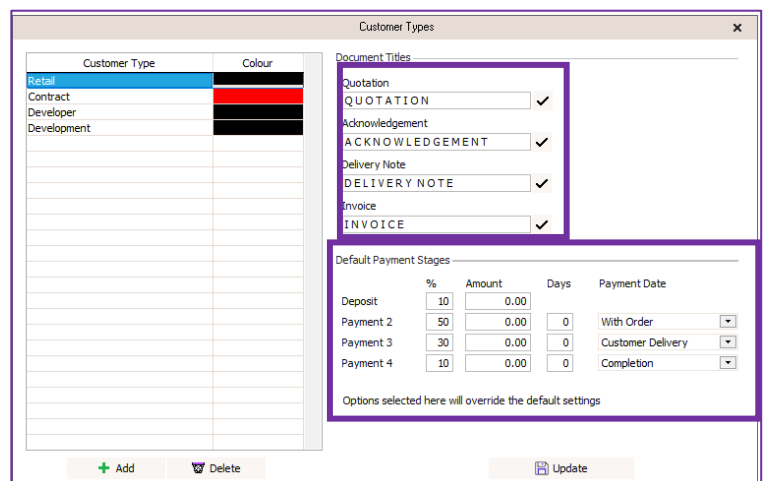
- Customer Types – allows for different default payment structures, rules and basic document layouts for each type of customer
- Sales People – allows to assign a salesperson to each customer
- Source of Lead – allows for analysis of differing lead sources
- Showroom – allows for analysis between different showrooms
- Changed to suit/
Users Own – user defined classification
- Users Own – use defined classification

Customer Types

Click Add at the bottom to add a type of customer to the list.

Give your customer type a name (in this example we've used Retail Fitted), and then configure the settings on the right.

Amend if necessary, the names of the documents for this type of customer. Click the pop-up boxes to the right for additional options, such as to set default notes at the bottom of the documents for this type of customer. Enter the default payment stages at the bottom.

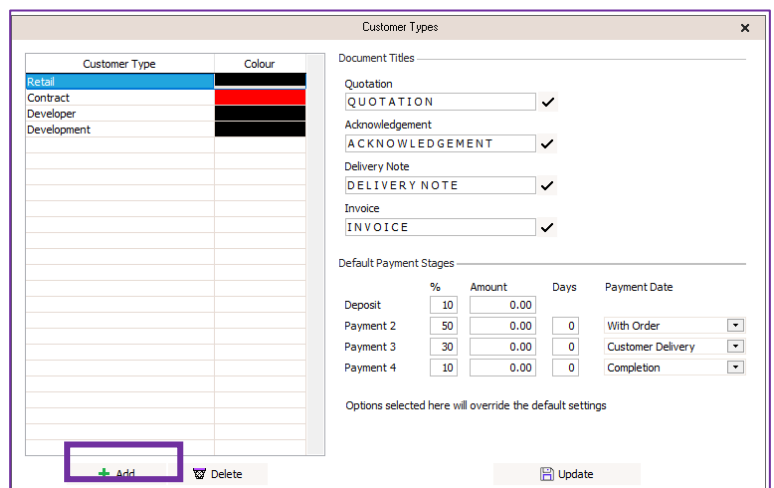


Customer Type	Colour
Retail	
Contract	
Developer	
Development	

Document Titles				
Document Title	Selected			
Quotation	☒			
ACKNOWLEDGEMENT	☒			
DELIVERY NOTE	☒			
INVOICE	☒			

Default Payment Stages				
	%	Amount	Days	Payment Date
Deposit	10	0.00		
Payment 2	50	0.00	0	With Order
Payment 3	30	0.00	0	Customer Delivery
Payment 4	10	0.00	0	Completion

You can add as many customer types as you wish by clicking the **Add** button. Once you've added the customer type, select it on the left to configure the settings for that type of customer on the right.



Customer Type	Colour
Retail	
Contract	
Developer	
Development	

Document Titles				
Document Title	Selected			
Quotation	☒			
ACKNOWLEDGEMENT	☒			
DELIVERY NOTE	☒			
INVOICE	☒			

Default Payment Stages				
	%	Amount	Days	Payment Date
Deposit	10	0.00		
Payment 2	50	0.00	0	With Order
Payment 3	30	0.00	0	Customer Delivery
Payment 4	10	0.00	0	Completion

Sales Person

Click **Add** on the right to add in each of your salespeople. You can also assign commission profiles to them here too (Professional users only) – these will need to be configured first. See the relevant help topic for instructions.

Sales Person

Sales Person	Phone	Fax	Email	Commission Profile
Anisha Patel	01509 611 677		AP@email.com	Basic
James Jones	01509 611 677		JJ@email.com	Basic
Kwok Cheung	01509 611 677		KC@email.com	
Polly Sanders	01509 611 677		PS@email.com	
Amy Moulton	01509 611 677		AM@email.com	Basic

+ Add

Delete

Signature

Update

Click Update to save your changes.

Source of Lead

Click **Add** at the bottom left to add in your lead sources. Enter the description, and if there has been a cost to your business for this lead source, click Add at the bottom right. Enter the date, when the lead source began and when it finished, and how much it cost your business (excluding VAT).

Lead Sources

Lead Source	Analysis Group
Facebook	Online
Instagram	Online
Website	Online
X	Online
Recommendation	Other
Showroom	Other
Flyer	Physical Media
Mailshot	Physical Media
Parish News Letter	Physical Media
The Village Times	Physical Media

+ AddDelete

Lead Source Expenditure

Date	From	To	Cost	Comments
01/08/20	01/01/20	31/12/21	900.00	
01/01/23	01/01/23	31/12/23	600.00	
01/01/26	01/01/26	31/12/26	1000.00	Year Run

+ AddDeleteUpdate

Repeat as necessary for all lead sources.

Showroom

Click Add on the right and enter the names of each of your showrooms. Click Update to save your changes.

Classifications

Title

Showroom

Descriptions	Additional Description 2	Additional Description 3
Ashby		
Loughborough		
Nottingham		

+ Add

Delete

Update

User Defined Classifications

You can use these other 2 as additional classification to use as you wish, for reporting and filtering purposes. Change the name of the classification as necessary and add in the relevant options. In the example below we have changed the name of the classification to Area and added in the different options.

Classifications

Title

Users Own

Descriptions	Additional Description 2	Additional Description 3
Option 1		
Option 2		
Option 3		

+ Add

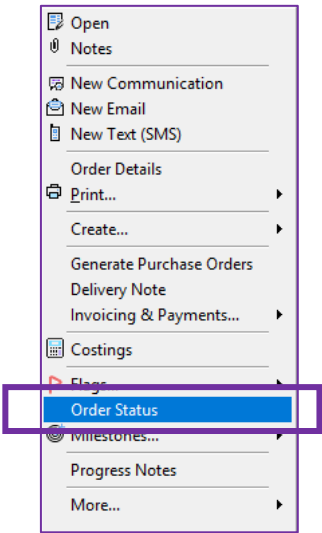
Delete

Update

Configuring Quotation/Order Statuses

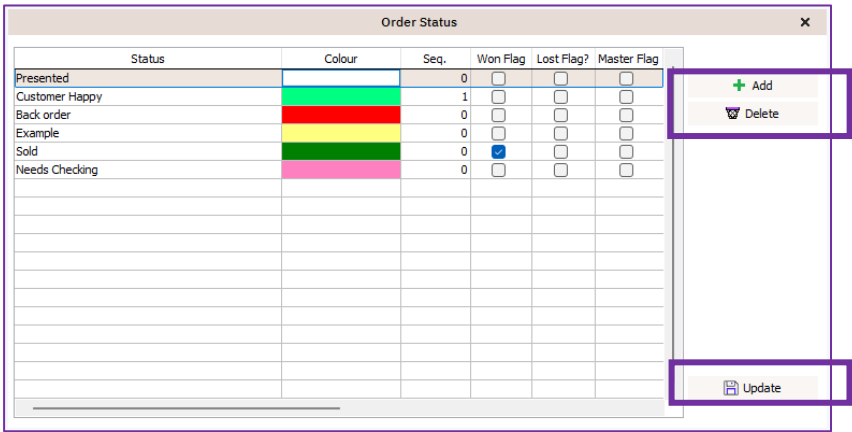
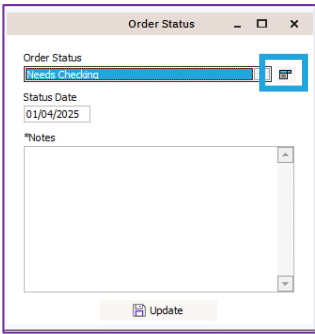
It can be useful to create statuses for quotes and sales orders, so you can see at a glance what stage they are at.

For this, you will need a saved quotation.



Right-click on the Quote ref. or Order Ref. number of a quote or sales order and select **Order Status**.

Click the small icon on the right-hand side of pop-up window.



Click **Add** on the right of the pop-up window.

Give your status a name, right click in the colour box and select from the palette. Repeat for all your quote/order statuses. You can have as many statuses as you require. Click **Update**.

To select a status for your quote/order, right click on the reference number, select Order Status, and select from the drop-down menu. You can also add some notes in this window which will be shown in the progress notes for the quote/sales order (**Progress Notes** are found in the drop-down menu when right-clicking the quote/sale reference). Click **Update**.

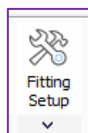
You will now be able to see the **Status** of your quote/order in the relevant tab within the customer's story board.

Groups	Communication	Opportunities	Quotes	Sales Orders	Purchase Orders	Invoices	Payments	Resources
Quote Date	*Quote Ref.	Own Ref.	2nd Ref.	Range	Nett Tot	Grand Tot	*Status	*Opp.Ref.
01/04/25	EQ1506	Bathroom - Master	This is for us...		457.50	549.00	Presented	
01/04/25	EQ1479				1,974.88	2,369.88		

Statuses are also particularly useful for filtering (Pro Only) and for use with the Workflow Module (additional module – please speak to a member of our sales team for more info).

Fitting Configuration

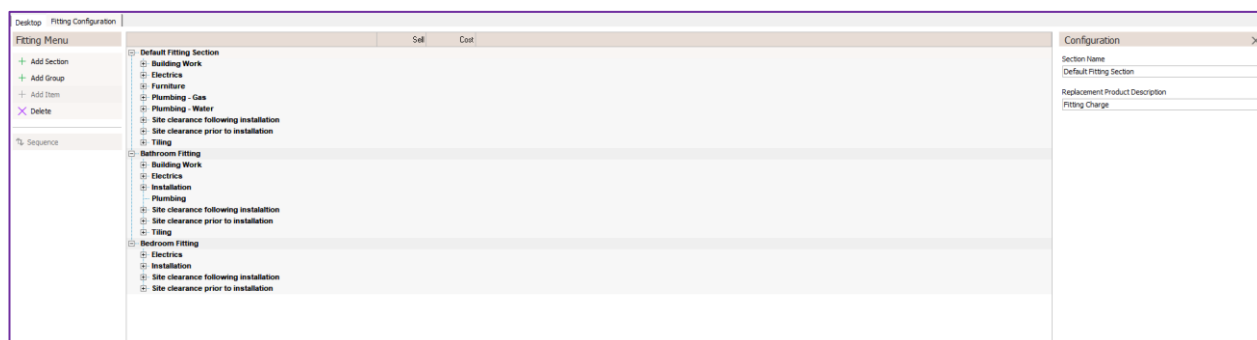
There are 3 methods of adding fitting to a quote – you can use one of the 2 built-in options (Job Price or Fitting Calculator), or you can add fitting as a product into My Catalogue. If you wish to add fitting using the calculator, you will need to configure it by following the steps below.



From the EQ Menu bar click **Fitting Setup**.

This will open the **Fitting Configuration** screen, which is arranged in a hierarchy of 3 tiers:

1. Fitting Section
2. Fitting Group
3. Fitting Item

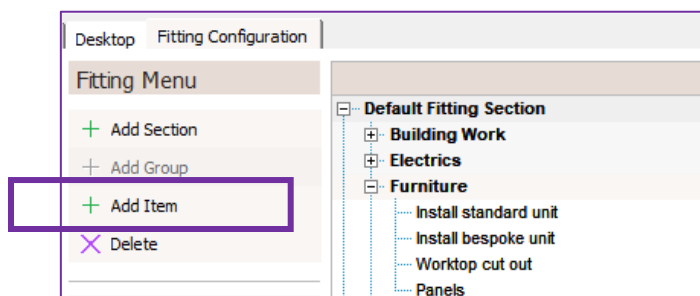


The default list shows one fitting section (called Default Fitting Section), and five fitting groups. Additional sections can be added if you have different groups of fitting, for example you might have a Kitchen Fitting Section and a Bathroom Fitting Section. If you wish to add additional sections, click Add Section on the left.

You might also wish to add additional groups – for example, a group for Plastering or Removal of Waste Materials. Click Add Group on the right-hand side.

Whether or not you add or amend Sections and/or groups, you will then need to add items. Items are the fitting elements that will have a price against them. When fitting is added to a quote using the Fitting List, you will need to put quantities next to the items that are relevant to calculate the total fitting price for the job.

To add an item, select the fitting group that the item is to sit within, and click **Add Item** on the left.



Enter the description for the item on the right-hand side (for example, Removal of existing kitchen), ensure it will sit within the correct group.

Enter your cost price and either a margin or just type your selling price in the relevant box.

Tick the relevant boxes to select how this item behaves on the fitting list:

- Compulsory – the user must put a quantity against it in order to continue
- Fix Cost – the user cannot change the cost price of the fitting item on a quote-by-quote basis
- Lock Automatic Quantity – allows you to set an automatic quantity against the fitting item that cannot be changed by the user
- Automatic Quantity – allows you to set a default quantity against the item, which may or may not be overridden by the user dependent on the Lock Automatic Quantity setting

Each of these settings can be used independently or in conjunction with one or more of the others.

Continue to add Sections/Groups/Items as required.

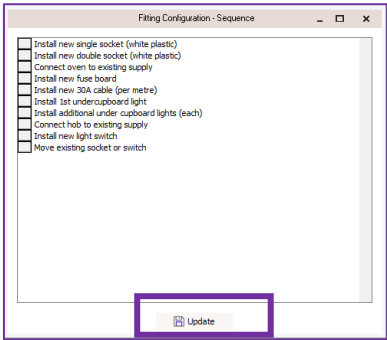
The example below shows a fitting calculator with one section, several groups and numerous items per group:

Fitting Menu		Sell	Cost
+ Add Section	[-] Default Fitting Section		
+ Add Group	[-] Building Work		
+ Add Item	Brick up existing doorway	375.00	300.00
✕ Delete	Board existing serving hatch	187.50	150.00
	[-] Electrics		
	Install new single socket (white plastic)	87.50	70.00
	Install new double socket (white plastic)	118.75	95.00
	Connect oven to existing supply	93.75	75.00
	Install new fuse board	562.50	450.00
	Install new 30A cable (per metre)	37.50	30.00
	Install 1st undercupboard light	93.75	75.00
	Install additional under cupboard lights (each)	37.50	30.00
	Connect hob to existing supply	93.75	75.00
	Install new light switch	118.75	95.00
	Move existing socket or switch	62.50	50.00
	[-] Furniture		
	Install standard unit	75.00	60.00
	Install bespoke unit	118.75	95.00
	Worktop cut out	118.75	95.00
	Panels	56.25	45.00
	[+] Plumbing - Gas		
	[+] Plumbing - Water		
	[+] Site clearance following installation		
	[+] Site clearance prior to installation		
	[+] Tiling		

Once you have all your fitting items created within the relevant groups, you may wish to reorder them into a sequence of your choosing. To do this, select an item of fitting & click **Sequence** on the left to open a pop-up.

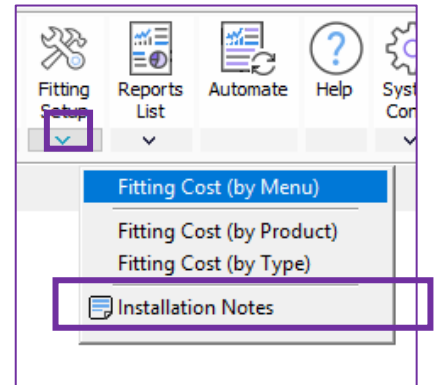
Hold the left-mouse button and drag the fitting items within that group into your preferred sequence.
Click **Update** when you have finished to save and close your work.

By default, your customer will only see the fitting groups that are relevant to them, rather than a full list of fitting items. This can be changed in **System Config Settings**.

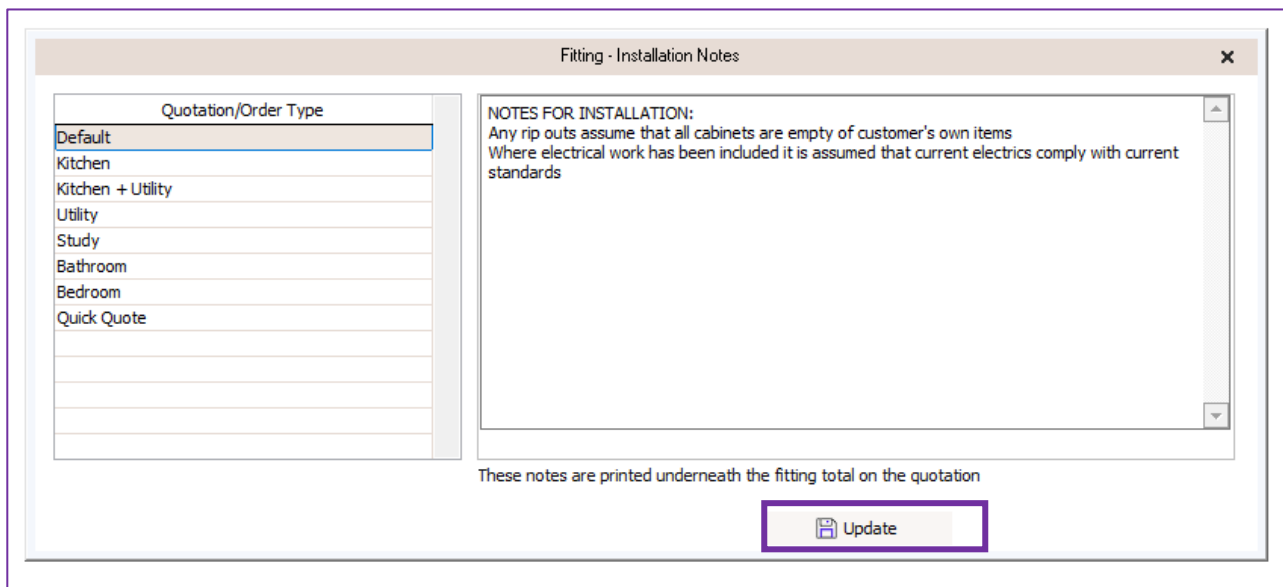


Setting Default Fitting Notes

Click the **Fitting Setup** drop-down arrow from the main menu bar and select **Installation Notes**.



Select the quotation type you would like to add fitting notes to.



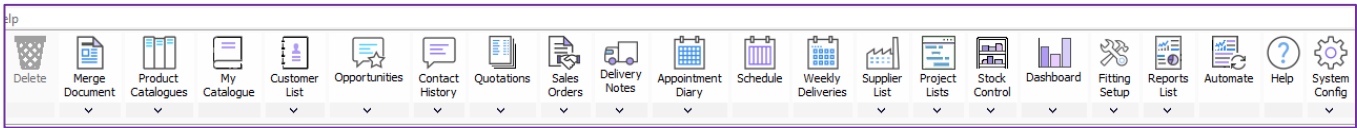
If the same notes are required for all quote types, then you only need to enter your notes against the **Default** type.

These notes will appear when you add fitting onto a quotation and can be amended on a quote-by-quote basis.

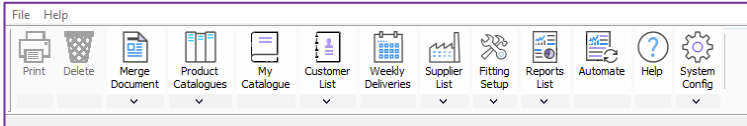
Click **Update**.

Customising your toolbar

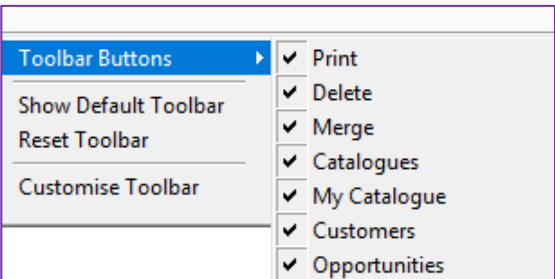
When you first log in to EQ, your main toolbar will look similar to this, if you've got Professional:



.....Or this, if you've got Foundation:



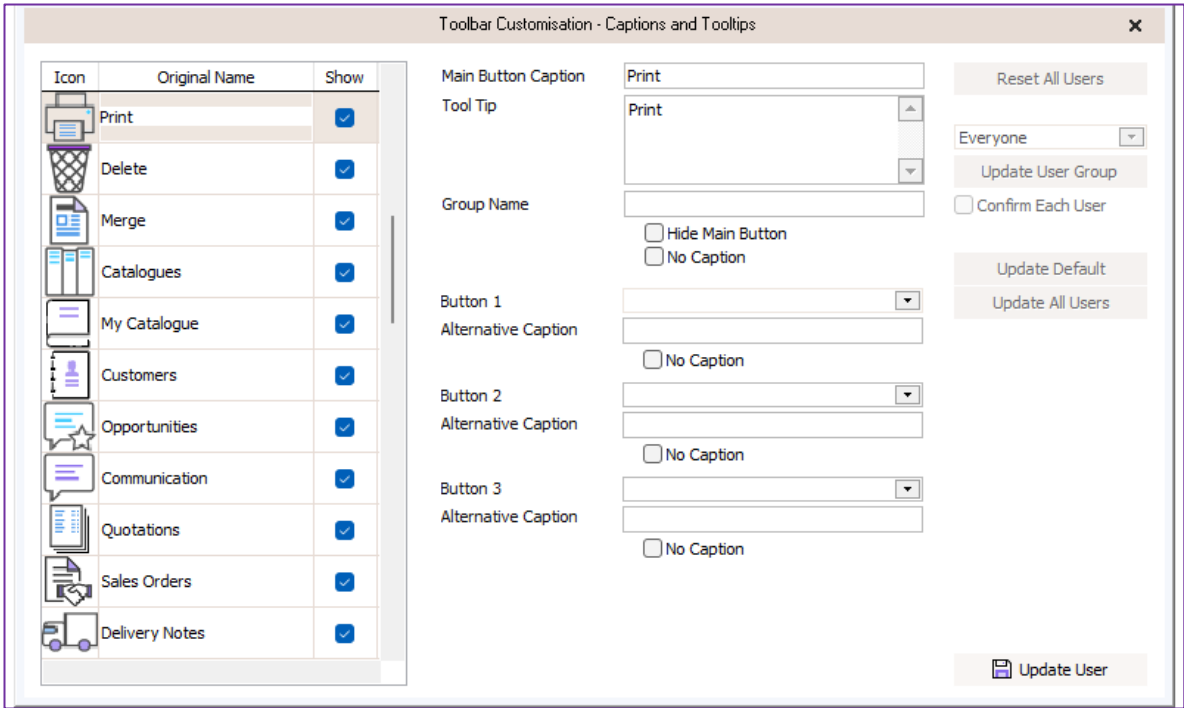
Add/Remove Buttons



Right click in the **empty area** of the toolbar on the right-hand side and select **Toolbar Buttons**. Click to select/deselect the buttons that you wish to see at the top of your toolbar. This will only change the settings for you.

Change Names & Tooltip Descriptions

Right click on the toolbar and select **Customise Toolbar**. Here, you can overtype the icon names, choose whether to make the icon visible, and change the tooltip descriptions of the icons.



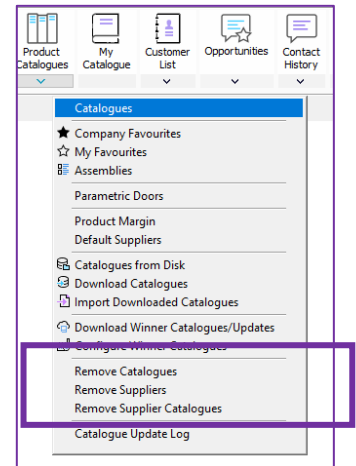
You can then update your settings for all users, update the default toolbar (so any new users will automatically get your custom toolbar), reset all users (which will reset all users' custom toolbars back to the EQ default), or just update the settings for your user log in. The access to these buttons can be controlled in User Groups.

Removing Unwanted Catalogues

It may be necessary to remove catalogues that are surplus to requirements. There are 3 methods for removing catalogues from your system:

1. Remove Catalogues
2. Remove Suppliers
3. Remove Supplier Catalogues

These options can be accessed from the Catalogues menu option and will require all users to be logged out in order to complete the process.



1. **Remove Catalogues** – this option will remove one or more catalogue/s completely from your system, regardless of how many suppliers you have the catalogue/s loaded from.
2. **Remove Suppliers**– This option will remove one or more supplier/s, and all their catalogues, from your system.
3. **Remove Supplier Catalogues** – This option will allow you to cherry pick which catalogues you wish to remove from each supplier separately.

Select the required method from the Catalogues menu, choose the catalogues/suppliers/supplier catalogues you wish to remove by placing an **X** in the box, and click Remove [Catalogues/Suppliers/Supplier Catalogue] at the bottom of the screen.

Hints and Tips



Ensure you don't have any catalogues downloaded but not imported into your system prior to removing catalogues – otherwise you might find they get re-loaded back on again!

Appendix 1

EQ Basics Course Overview

Are you new to EQ? Have you been using EQ for a number of years but maybe aren't sure if you're doing things the right way? Are you self-taught? If so, our EQ Basics course is for you, by the end of the EQ Basics course you will be able to:

- Find supplier information.
- Enter customer details.
- Produce quotations including applying discounts and checking profit margins.
- Place purchase orders to suppliers.
- Record payments, raise invoices and credit notes.

Full Course Contents

Overview of Suppliers Screen	Finding supplier contact information & add specific contacts for suppliers
Overview of My Catalogue	Explanation of manually added products
Catalogue Search	Searching through your product database to find information about products & check your prices
Creating Customers	Creating customer records, including all contact, delivery & classification information
Using Customer Folders	How to use the Windows folder that EQ creates for each customer - for example to store before & after photos of their project
Sending Emails & Texts	How to send a simple email/text message from EQ
Building Quotations (Basics)	Building, saving, printing & editing quotations
Building Quotations (Advanced)	Creating multiple revisions of quotes, changing door ranges, using right click menu, mixing door styles within the same quotation.
Check Profit Margin	Find out what your estimated profit is for a quotation
Applying Discounts to Quotations	Applying both % and £ discounts to a quotation to arrive at an agreed selling price
Accept Quotation	Turn your quotation into a customer order & enter key dates & payment stages against it
Recording Payments	Record a customer payment against a sales order and create a receipt
Print Order Acknowledgements	Produce an order acknowledgement, that can be presented in conjunction with your standard terms & conditions, for your customer to sign
Placing Purchase Orders	Place purchase orders to your suppliers
Delivery Notes	Create a delivery note from within EQ
Printing Invoices	Produce an invoice from EQ
Credit Notes	Create a credit note
Refunds	Refund money to a customer
Printing Reports	Extract information out of the system

More about Training

Email: training.gb@cynonly.com find out more and book your place.

Appendix 2

Working out Margin vs Mark up

COST ex VAT	MARK UP %	RETAIL PRICE ex VAT	MARGIN %
100	10%	110	9.09
100	20%	120	16.67
100	25%	125	20
100	30%	130	23.08
100	40%	140	28.57
100	50%	150	33.33
100	60%	160	37.5
100	70%	170	41.18
100	75%	175	42.86
100	80%	180	44.44
100	90%	190	47.37
100	100%	200	50
100	150%	250	60
100	200%	300	66.67
100	250%	350	71.43
100	300%	400	75
100	400%	500	80
100	450%	550	81.82
100	500%	600	83.33

TO WORK OUT MARGIN: (ex VAT)

$100 - 100 \times (\text{COST} / \text{RETAIL})$

E.g. Cost = 120, Sell = 160:

$120 \div 160 = 0.75$

$0.75 \times 100 = 75$

$100 - 75 = 25\%$

IF COST = £100.00:

50% MARK UP = £150.00

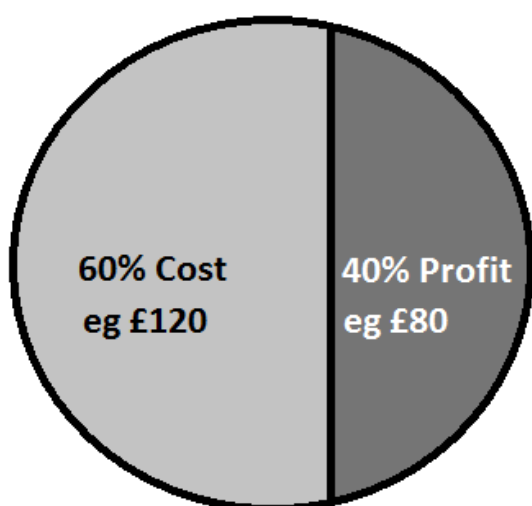
50% MARGIN = £200.00

When using **Margin**, your sell price is 100%, therefore your cost will be a percentage of your final sell price with the rest being your profit margin. To calculate a 20% margin, you divide COST price by 0.8, for 30% divide by 0.7, for 40% divide by 0.6. So, if cost = £120, with a 40% margin we sell for £200: 40% of £200 is £80, our profit margin, the other 60% being £120, our cost price.

30% = sell for £171.43

40% = sell for £200

50% = sell for £140



= 100% Sell Price

So a product costing £120 ex VAT, with a 40% margin, would sell for £200 ex VAT; £120 being the 60% Cost, £80 being the 40% profit & £200 as the 100% sell price

[illegible]