



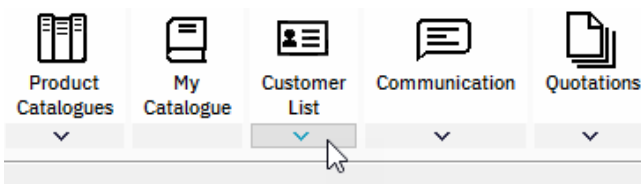
# NEW FEATURES IN EQ VERSION 17.5

A Cynoly Company

## USER INTERFACE

### Toolbar Improvements

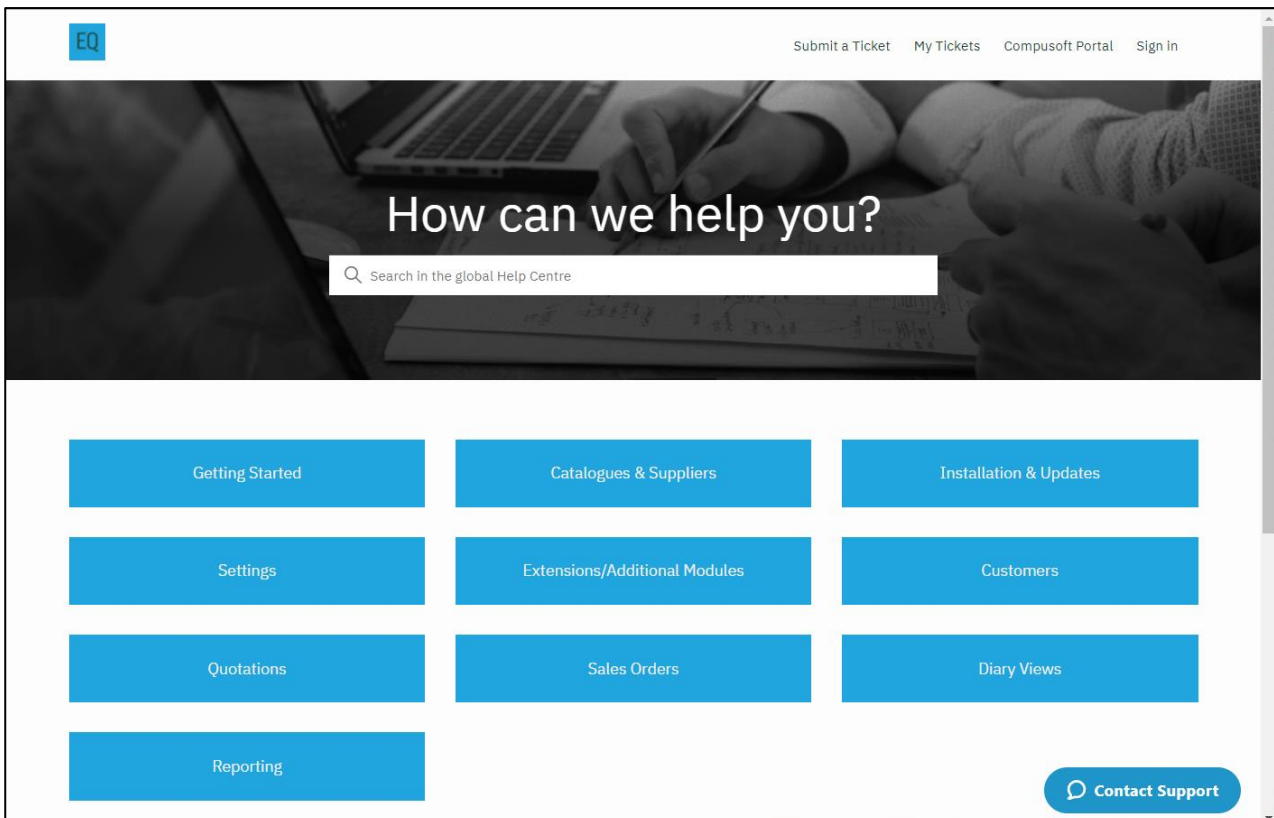
A change to the toolbar updates the “More” arrow so that the arrow icon is centred and the whole length of the button is clickable, making it easier to click.



### EQ Support Centre

EQ Help button links to the new **EQ Support Centre** which is accessible from within EQ and online directly at <https://eq.support.compusoftgroup.com/hc/> Put it in your favourites!

Inside EQ click the **Help** button and be taken directly to the Support Centre. You can search for help articles, videos, use the chat bot to help locate articles or join live online chat to talk with a support agent.

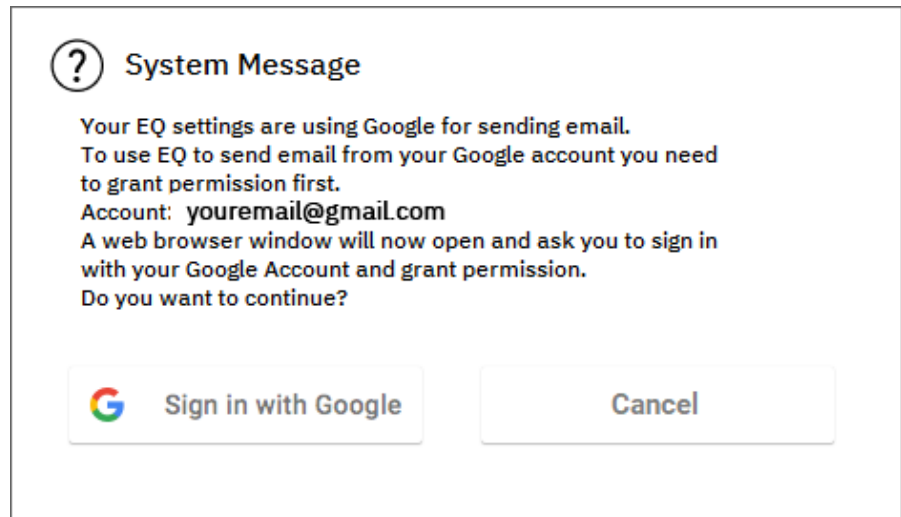


## Sign in with Google for Gmail sending

When setting up EQ to send email via Gmail, you can now use Google's secure authorisation by clicking **Sign in with Google**.

All you need to know is your Google account and password the first time you set it up, then EQ is authorised to connect to

Google. This uses OAuth 2.0 authorisation to connect to Google's email servers replacing the less secure SMTP method for email.



## Email sending logs

When sending an email via EQ (with or without quotation attachments), if there is an error encountered from the mail server, EQ's system message will display the email log in full. This will inform the user and make it quicker to find the cause of the problem.

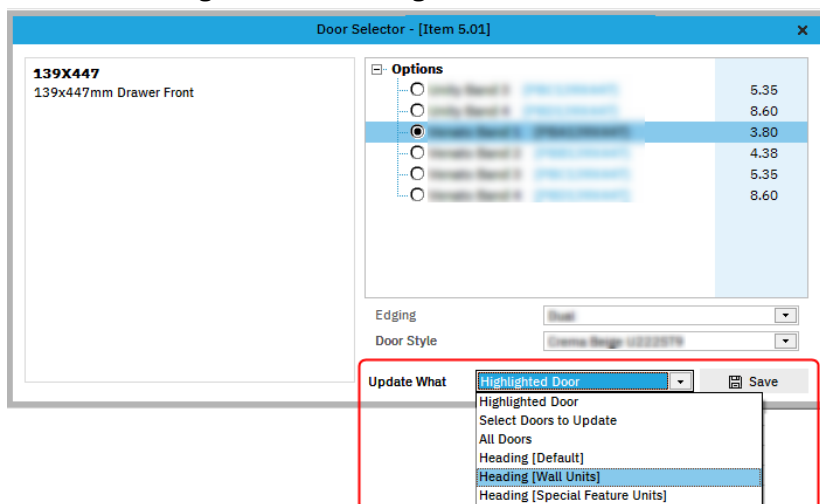
## Commission Profiles Report

Commission profiles, which rely on categorised products, can now work with **Freecode** (miscellaneous) products.

# QUOTATIONS & ORDERS

## Door Selector Updates

Within a quote/order the **Door Selector** has a new option under **Update What** to change doors in bulk per furniture heading, for a time-saving shortcut:



## Select Door Image

You can select between showing a door image or range image (when available in the catalogue) when the door is added to a quote/order. See System Config > Component Pricing > **Door range images**.

## Show door/drawer fronts

In System Config > Component Pricing > **Show door/drawer fronts separately** can now be specified for individual catalogues (not just a global setting).

## Order Discounts

There is a new setting for **Order Discount** on the quote/order (the discount box, not the separate window). If an entered discount exceeds the maximum user catalogue discount (setup in **Users** settings) now a system message informs the user and only the max allowed % is applied to the relevant products.

The screenshot shows a 'Configuration' window with a close button (X) in the top right. The 'Fitting Item Description' field contains 'Brick up existing doorway'. Below it, the 'Group' dropdown menu is open, showing a list of options. The 'Building Work' group is selected and highlighted in blue. The list of options includes:

Group	Default Fitting Section
Building Work	Default Fitting Section
Building Work	Bathroom Fitting
Electrics	Default Fitting Section
Electrics	Bathroom Fitting
Electrics	Bedroom Fitting
Furniture	Default Fitting Section
Installation	Bathroom Fitting
Installation	Bedroom Fitting
Plumbing	Bathroom Fitting

## Fitting Configuration (by Menu)

When editing your fitting items, the Fitting Group menu now shows the name of the Section by the Group names.

This makes it easier to see groups when you might use more than 1 section, such as for kitchens, bedrooms and bathrooms.

## Fitting Comments

When adding fitting onto a quote/order there is a new option to add an internal comment next to **Job Price**.

The comment is not printed, so it is useful for internal notes about the fitting price visible only to users on screen.

The screenshot shows the 'Fitting Details - [Item 1.0]' window. It contains the following fields:

- Fitting Section: Default Fitting Section
- Description: Fitting Charge
- Notes: NOTES FOR INSTALLATION: Any rip outs assume that all cabinets are empty of customer's own items Where electrical work has been included it is assumed that current elect
- Enter Job Price:
- Total Price: £ 1235.00 More
- Internal Comment: Price disussed. Customer supplying own skip.

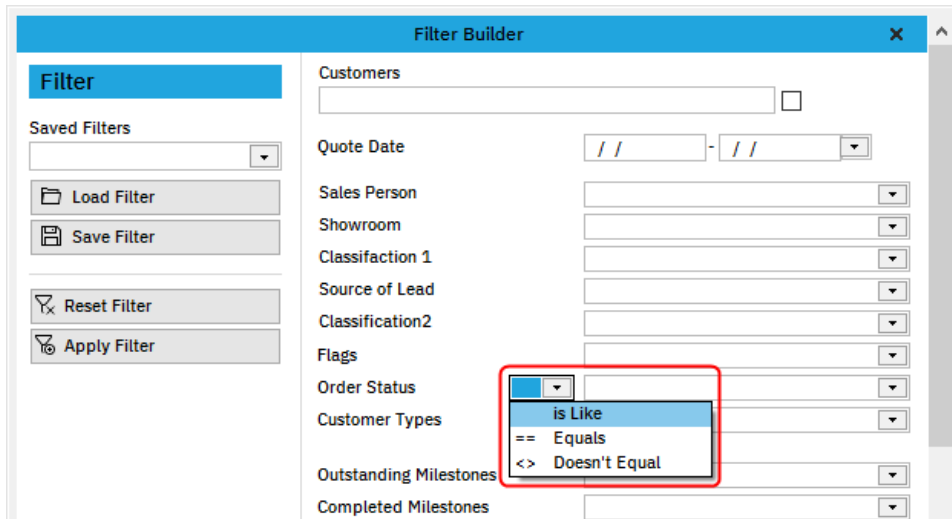
## Learn Carcase Handing

New option in System Config > Component Pricing to **Learn carcase handings** (requires door handing enabled too). This will allow you to use carcase products, like doors, and have handing automatically entered after you have entered handing once.

## Projects Quotations Filter by Order Status

Projects > Quotations > Filter List > new options to filter by **order status now show:**

- is like
- equals
- does not equal.



## PURCHASE ORDERING

Ordering between EQ systems has been improved to allow for greater complexity of orders using EQX files to order from a retailer to a supplier/manufacturer.

### Exporting EQX files to order (to a supplier)

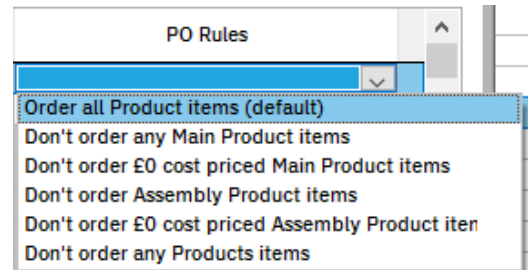
**Exporting EQX** files can now support orders with alternative furniture headings (enabled by a configuration option).

### Importing EQX files (from a retailer's EQ system)

- Importing an order now supports product-level **door parameters** to be imported. This allows for mixing of door colours at a product level.
- Importing an order can now support **importing the PO delivery date** (set on the sending EQ system) which is imported into the customer delivery date (on the receiving EQ system). Requires a configuration option.
- Item numbers on imported EQX orders follow the original item number from the import (not sequentially re-numbered upon import).

## Purchase Order Rules

Supplier > Catalogues list > scroll right for PO Rules. These options change the purchase order routine so that you can have rules permanently set **when raising purchase orders to the selected supplier**.



## Purchase Order Exclude Products

Supplier > Catalogues list > **Exclude Products** screen which allows for products to be removed from the purchase order and booking in process. Products can therefore be used at the point of sale to show a product code line item and/or cost and then automatically assumed as purchase ordered, so that they do not interfere with the delivery process. Automatically placed purchase order items are displayed in purchase order window 2 in red text. Automatically placed purchase orders in **Projects > Purchase Orders** show in red and cannot be booked in.

# INVOICES & CREDITS

## Reverse VAT compatible invoices

When raising a sales invoice or credit note, EQ can separately show the VAT element along with explanatory text to fulfil the reverse VAT charge requirement for building services. This acts on the VAT amount for your products in the **Fitting** group, or on the whole value for part invoices or free type credit notes (if you select the Reverse VAT charge). For more information read this Support Centre [Reverse VAT article](#).

Example text on the invoice footer:

**\*\* Customer to account to HMRC for the reverse charge output tax on the VAT 'reverse charge' at the relevant VAT rate.**  
VAT Amount @ 20% £120.41

## Recording supplier invoices and credit notes

New option in System Config > **Purchase Orders > Configuration** called **Require products to be allocated when recording purchase invoices/credits**. When enabled it will prevent recording values without any product details being allocated first.

When entering a total value in the **Purchase Invoice** screen, if the total is different to the estimated total (based on the purchase order) it will display the estimated total in orange to alert the user of the difference.

The **Purchase Invoice/Credit** window shows which fields are compulsory with \* symbol.

A screenshot of a software form titled "Supplier Purchase Invoice Details" with a "\* Required" indicator in the top right. The form contains the following fields and values:

- Supplier Invoice No.: INV111 \*
- Transaction Date: 01/03/2022
- Nominal Code: (empty)
- Nett Amount: 695.00 \* Est.620.00
- VAT Amount: 139.00, with a dropdown menu showing 20.00 and a calculator icon.
- Total: 834.00, with an "Auto Allocate" button.
- Unallocated: 695.00

## SEO Export Options

When working with your catalogues in eStore, our eCommerce platform, there are new features to enable a custom SEO export file. This makes it quick and easy to complete SEO data for all your products. There is also an **image checker** to ensure you are uploading the best catalogue data to your website.

### Automating Catalogue SEO Settings Export

<h4 style="margin: 0;">SEO Title Contents</h4> <p><input checked="" type="checkbox"/> Prefix Collection</p> <p><input type="checkbox"/> Prefix Brand</p> <p><input checked="" type="radio"/> Description - Product Code</p> <p><input type="radio"/> Product Code -Description</p>	<h4 style="margin: 0;">SEO Keywords Contents</h4> <p><input checked="" type="checkbox"/> Include Colour/Finish</p> <p><input type="checkbox"/> Include Collection</p> <p><input checked="" type="checkbox"/> Include Product Type</p> <p><input checked="" type="checkbox"/> Include Category</p> <p><input checked="" type="checkbox"/> Include EAN</p> <p><input checked="" type="checkbox"/> Include Brand</p>	<h4 style="margin: 0;">SEO Extended Description</h4> <p>Number of Characters <input style="width: 50px;" type="text" value="145"/></p> <hr/> <h4 style="margin: 0;">SEO Export (Sample Product)</h4> <p><input type="button" value="Test"/> <input type="button" value="Reset"/></p> <hr/> <p><input type="checkbox"/> Update Empty (blank) SEO values</p> <p style="text-align: center;"><input type="button" value="Create Catalogue SEO Export File"/></p>
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## Copy Shortcuts

The eStore catalogue window **Product Details** tab has new shortcuts:

- Click the **product code** to copy it to clipboard
- Click the **link icon** to launch a web browser with a Google search on the current product.