EQx EQ Flex
Version 18

What's New?
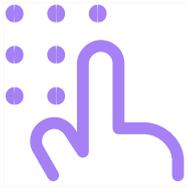
Brand new interface

New toolbar, colours and icons

Now part of the Cyncly suite of applications, EQ version 18 sports a new design with brand new colourful icons.

The new design delivers a gentle colour palette, making it clearer and easier to read your information and quicker to identify icons.
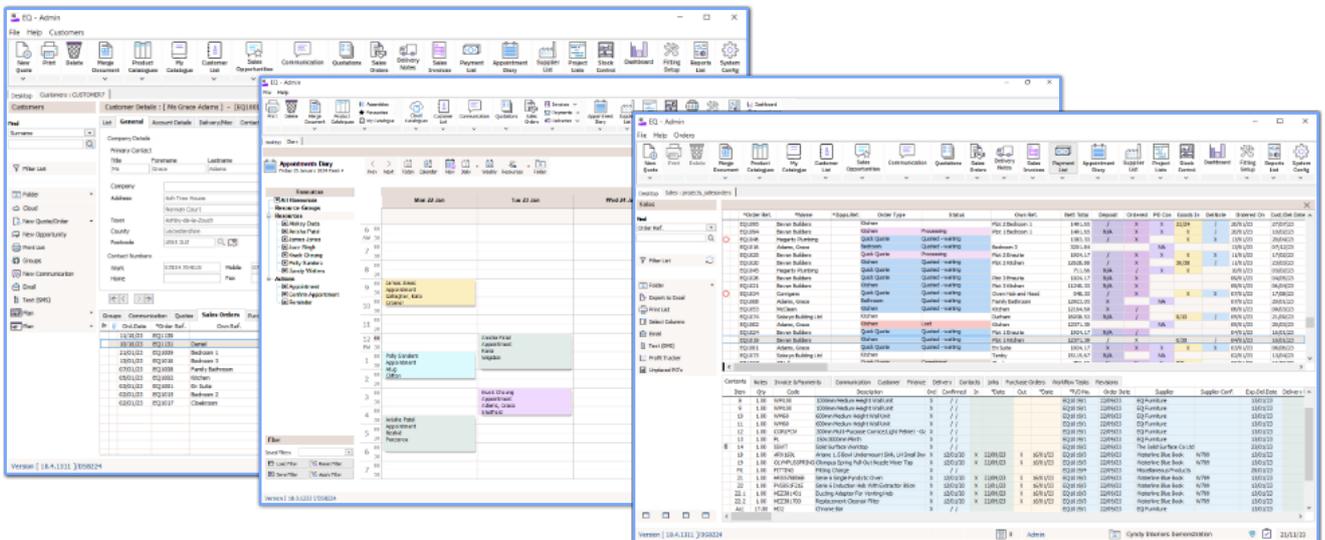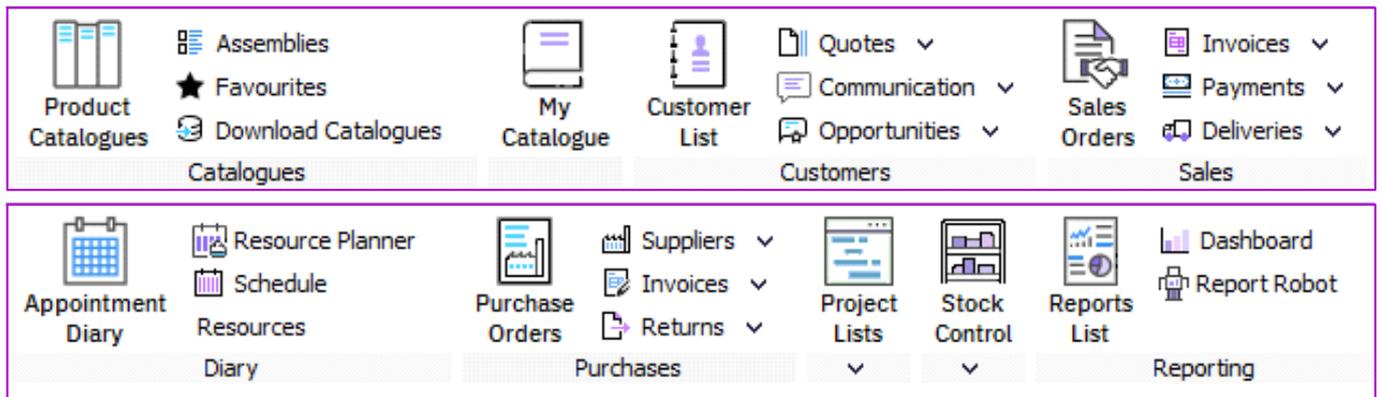
Don't forget you can customise your toolbar per user or user group. You could simplify it to remove buttons that are not needed for some users or make a power user toolbar with groups of icons together.

Full functionality in your browser, anywhere!

Work with all of EQ's rich functionality from your web browser, on any device!

EQ provides access to all of the features and all of your data from any online location on devices such as Windows laptops, tablets, iPads, Macs and Chromebooks.
Contact sales for more information on 01509 611 677.

Quotations

Mix multiple furniture catalogues in one quote/order

You can now create quotes and orders with a mixture of fitted furniture catalogues. It's great for mixing brands across special feature units, or combining a kitchen and utility on one order for example.

Quotation headings have been expanded to give access to all the furniture and door catalogue options, making it easier to manage different door choices.

The **Add** button can now prompt you to pick the correct heading before selecting your products.
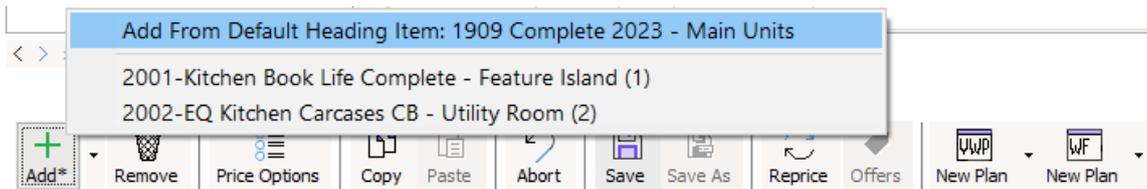
Printed quotes will show your separate headings with all the heading information.

Enable this setting in **System Config > Configuration** and tick **Show Alternative Headings on Quote Add Button.**

Quotation References

You can customise the labels for the quote and order screen references.

Ref and **2nd Ref** can now be renamed according to your business need. Your title will appear on the quotation and order screens instead of Ref and 2nd Ref. See **System Config > Heading Prompts** to set the captions.

Quote Heading Prompts & Titles

Users can decide how to use the default and alternative headings. Version 18 introduces the ability to have a heading title on your default (first) furniture heading.

In **System Config > Heading Prompts:**

- Tick **Show Default Title** to show a text box to name the main/first furniture heading.
- In **Default Title Heading** enter text to always show as a default heading name.
- In **Alternative Heading Text** enter text for alternative heading names.
- Tick **Print Default Title** if you wish to print the first furniture heading title.
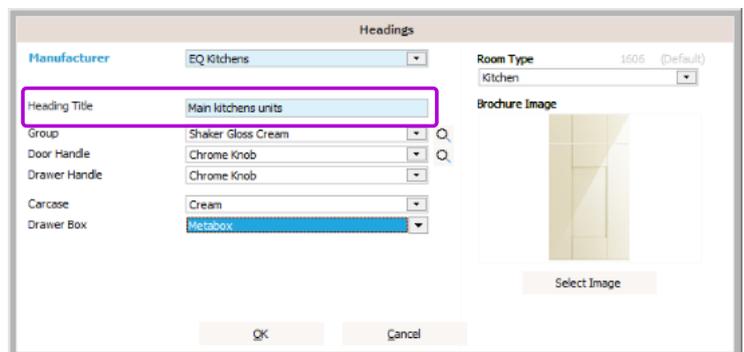
User Discounts

When you have restricted a user to providing a set level of discount, that maximum level can be discretely shown on the quote screen.

Products impacted by the discount limit will show a * symbol next to them.

The new option is in **System Config > Order discounts prompts** > **Show/hide User product discount %** to show what the maximum user level discount is.

Product Groups for Furniture Products

Products in a furniture catalogue do not just have to display in the Quote Group Furniture. A new option allows them to use their respective Group (determined by the product type and category) instead of always being overwritten by the Quote Group "**Furniture**".

Enable it in **System Config > Quotation Layout**. The checkbox is **Respect product Quote Groups instead of defaulting to Furniture**. You need to enable the option (it is not on by default).

Option shows Lighting

	Groups	Qty	Item	Code*	Description*
📎	Furniture	1.00	1	SLCOBLEDNW	5m Diffused LED Strip Light Self Adhesive Natural White [CK]
📎	Lighting	1.00	2	SLCOBLEDNW	5m Diffused LED Strip Light Self Adhesive Natural White [CK]

Virtual Worlds Integration

Plan to Quote

You can plan your design in the leading bathroom CAD package and then price in EQ quickly and accurately. You are ready to quote, order and track your orders through to completion.

The integration features:
- Import the plan file (no need to create export lists of products).
- Compare customer details so users can still work and edit in either application.
- Rich product information from Virtual Worlds when importing.
- Read the article: **Virtual Worlds Integration** for steps on how to get started.
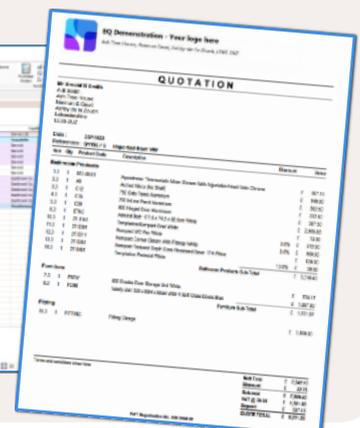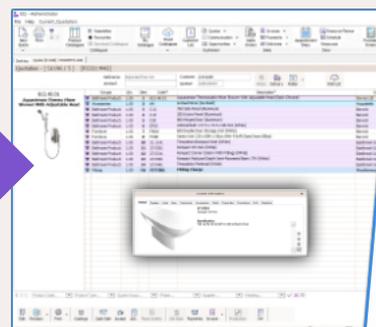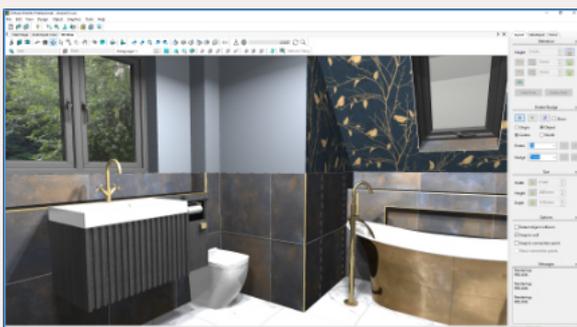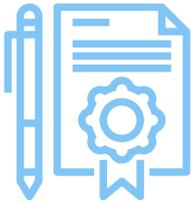
Orders

New Filter List Options in Projects > Quotations

The **Filter List** in **Projects > Quotations** provides new options for:

- **Order Status**
- **Customer Types**
- **Customer Status**

to allow for flexible searching across your quotes.
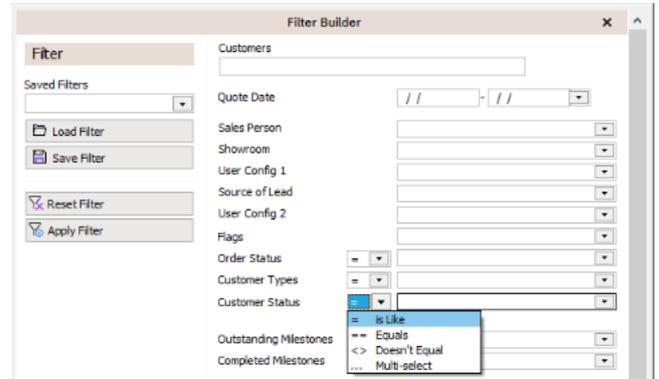
Uform Direct Ordering
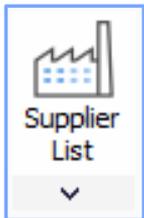
Link EQ directly to Uform to send rapid orders and receive quick supplier confirmations. No additional steps are needed to send an order outside of EQ so you can place accurate orders and receive confirmations quickly.

Go to your EQ **Suppliers** screen and click the **Uform EDI Ordering** button.

Suppliers Receiving Electronic Orders

For suppliers and manufacturers receiving electronic orders from retailers' EQ systems, you can default the folder that you use to import EQX files.

Go to **Users > Additional Settings >** tab for **Miscellaneous/Folders** and set your folder.

Costings Screen Export

When exporting the costings screen to Excel format you can now include columns for the **customer name** and **customer reference number**.
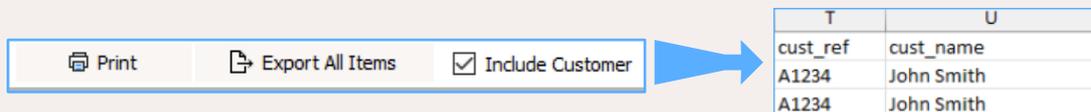
Reverse VAT Display

To help comply with the requirements to make the reverse VAT charge clear on printed full invoices, EQ has a reverse VAT option which can be enabled. The new option can display reverse VAT on invoices and credit notes with appropriate wording.

The invoice VAT line will show the calculated VAT value for every product group except for Fitting. Under separate text about the reverse charge responsibility it will show the VAT value for all **Fitting** products. Read more details about reverse VAT here.

Reporting

Projects Extended Report

In **Projects > Quotations List** there is a new extended print option which provides extra colours for order status, sales discount £, discount %, profit £ and margin %.
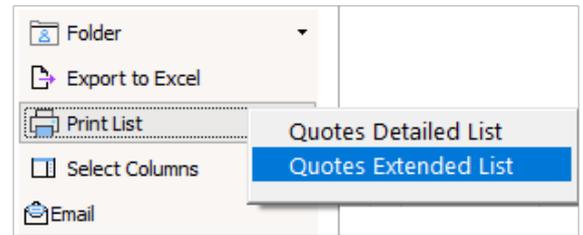
Outstanding Quotations Report

The Outstanding Quotations Report has new extended report summaries to group by customer type, order type, order status and sales person.

There are also 2 new report outputs:
1. **Detailed order status extended**
2. **Summary by order status**

EQ Automate enables automation & *Power BI* Integration

Set a schedule for EQ to perform automated exports of your key business data. You can then easily use this data that EQ produces in your preferred business intelligence tools such as Microsoft Power BI, Salesforce Tableau, Google Looker or others.

Display your business critical data in a dashboard that is easy to visualise so you can see trends and patterns.

Create easy to use interactive charts to get a high level view of your business and then take a deep dive into all of the details to help monitor performance, track progress, identify problems, and make informed decisions.