Installation Guide

an Introduction to EQMS CRM
Installation options

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👥 Installation Guide

2 | Introduction

EQMS is simple, affordable, ready to use sales lead management software that provides you all the required information easily at your finger tips, thus letting you respond to customers/prospects quickly and focus on important activities such as working on strategy to improve sales, build strong customer relationship, generate more leads and so forth.

This is an installation guide for EQMS CRM software.
This will help you setup EQMS software on single pc, multi-pc connected on LAN, on your VPN, private cloud or public cloud.

Manage your leads in 3 easy steps

lead → follow-up → closure

Operating systems supported

EQMS CRM is a windows application hence it would by default be installed on windows pc or laptop

For MAC user you would need 3rd party tool such as parallel which supports windows application on MAC

If you have any issues/queries during download or installation of EQMS kindly contact our helpdesk for free support at
support@spinso.com
+91.22.25826330
+91.22.25826331

3 Free Trial

EQMS is available for free trial, so you can download and install software without registration or sharing credit card details

For free support during trial period mail us at trial@spinso.com

All features are enabled in during trial edition with entry restriction

Download install and you are good to go

Applicable for Editions: My, Basic, Standard & Professional

No Registration
No Personal Details
No Credit Card

A step by step guide on how to download and install EQMS is available on our official website spinso.com/EQMS

Please note *default login details for trial use*
Login Id : admin
Password : demo
You can change password if you wish

Applicable for Editions: My, Basic, Standard & Professional

all spinso products comes with free trial
so Try before you Buy

4 Installation options

Accessing and Installing EQMS on various networks

a. Single PC or laptop

PC   or   laptop

✔ *Data and application is locally stored*
✔ *you don't need internet to access the data*

b. Multi PC connected on LAN

✔ *Data and application is locally stored*
✔ *you don't need internet to access the data*

c. VPN— virtual private network

✔ *Data and application is locally stored*
✔ *You would need internet to access your VPN*

d. Private Cloud

your server

✔ *Data is stored on your server, you manage the data*
✔ *Application is installed on client pc/laptop*
✔ *You would need internet to access your Private cloud*
✔ *Supports anywhere access*

e. Public Cloud

spinso server

✔ *Data is stored on spinso server*
✔ *Application is installed on client pc/laptop*
✔ *You would need internet to access spinso cloud server*
✔ *Supports anywhere access*

The only CRM that comes with option to store data on your server or go cloud

PC   or   laptop

You can install EQMS CRM on single pc or laptop, where the data and application would be installed on same pc and multi user can access the application via their respective login ID

Please note

✔ *Data and application is locally stored*

✔ *you don't need internet to access the data*

Prerequisite
Operating system Windows Xp or later (Windows 7 recommended)
Dot net 2.0 *free runtime from Microsoft available on our website*
Crystal report *free runtime for reports available on our website*

Applicable for Editions: My, Basic, Standard, Professional, Premium & Enterprise

Your data on
        your server

You can also install EQMS CRM on multiple pc connected on LAN, in this case you would need to identify one pc or server as "Server PC" where data would be stored and other client(s) pc would connect to the "Server PC" to access and store the data

Here the data is centrally stored on your server pc

Please note

 ✔ *Data and application is locally stored*

 ✔ *you don't need internet to access the data*

For Basic, Standard & professional Edition

 ✔ *you need to share the folder on server pc and give full rights (read & write) so that other client pc can access the data*

 ✔ *"Server PC" could be any pc, laptop or server with windows operating system and would always be connected to network (LAN) as the data would be stored on this pc/server*

For Premium & Enterprise Edition

 ✔ *In case of premium and enterprise edition you need not share the folder as it works on IP (more secured)*

Prerequisite for Basic, Standard & professional edition
Operating system Windows Xp or later (Windows 7 recommended)
Computers connected on LAN
Shared folder with full rights
Dot net 2.0 *free runtime from Microsoft available on our website*
Crystal report *free runtime for reports available on our website*

Prerequisite for Premium & Enterprise edition
Server : Windows 2003 or later
Clients : windows 7 or later
SQL Server (License/Free Edition)
Public or Static IP
Dot net 2.0 *free runtime from Microsoft available on our website*
Crystal report *free runtime for reports available on our website*

Applicable for Editions: Basic, Standard, Professional, Premium & Enterprise

Your data on your server

You can also install EQMS CRM on your VPN. The installation step would be same as **Multi PC on LAN.** The only difference here would be user would connect to your VPN via Internet and would access EQMS.

Please note

✔ *Data and application is locally stored*

✔ *You would need internet to access your VPN*

Prerequisite for Basic, Standard & professional edition
Operating system Windows Xp or later (Windows 7 recommended)
Computers connected on LAN
Shared folder with full rights
Dot net 2.0 *free runtime from Microsoft available on our website*
Crystal report *free runtime for reports available on our website*

Prerequisite for Premium & Enterprise edition
Server :   Windows 2003 or later
Clients : windows 7 or later
SQL Server (License/Free Edition)
Public or Static IP
Dot net 2.0 *free runtime from Microsoft available on our website*
Crystal report *free runtime for reports available on our website*

Applicable for Editions: Basic, Standard, Professional, Premium & Enterprise

Your data on
your server

You can also install EQMS CRM on your private cloud, if you wish to give access to your employee/ team, who are not part of your local network. EQMS users would access the application and connect to your server to access the data

Please note

✔ *Data is stored on your server, you manage the data*

✔ *Application is installed on client pc/laptop*

✔ *You would need internet to access your Private cloud*

Prerequisite
Server : Windows 2003 or later
Clients : windows 7 or later
SQL Server (License/Free Edition)
Public or Static IP
Dot net 2.0 *free runtime from Microsoft available on our website*
Crystal report *free runtime for reports available on our website*

Applicable for Editions: Premium & Enterprise

Your data on

your server

e. Public Cloud

You can also install EQMS CRM on Spinso cloud, if you wish to give access to your employee/team, who are not part of your local network. EQMS users would access the application and connect to spinso server to access the data. This is useful if you do not wish to manage server

Please note

✔ *Data is stored on spinso server*

✔ *Application is installed on client pc/laptop*

✔ *You would need internet to access spinso cloud server*

Prerequisite
Clients : windows 7 or later
Internet access
Dot net 2.0 *free runtime from Microsoft available on our website*
Crystal report *free runtime for reports available on our website*

Applicable for Editions: Standard, Professional, Premium & Enterprise

Installation Steps
You can find the installation steps for trial use for the following edition

My
Single pc : http://spinso.com/eqms/my/EQMS_my_Free_Trial.htm

Basic
Single pc : http://spinso.com/eqms/basic/EQMS_basic_Free_Trial.htm
Multi pc on LAN: contact spinso

Standard
Single pc : http://spinso.com/eqms/standard/EQMS_standard_Free_Trial.htm
Multi pc on LAN: contact spinso

Professional
Single pc : http://spinso.com/eqms/EQMS_Free_Trial.htm
Multi pc on LAN: http://spinso.com/eqms/EQMS_LAN_installation.htm

Premium
Premium edition is not available for trial use, we recommend you to try Professional edition.

Enterprise
Enterprise edition is not available for trial use, we recommend you to try Professional edition.

6 Registration

Registration is applicable for users who have made the payment and wish to activate the product.

After the product license is activated you can either continue with the trial data or start fresh

EQMS CRM registration steps
- Fill registration details
- Product activation

Registration & activation process happens only once, you can do the registration and activation from any pc or server

Once registered and activated it would automatically update on all the client

7 Uninstall/Reinstall

Uninstall

If you have installed EQMS for trial use you can uninstall the application using following steps

On Server PC
Start - control panel - programs - uninstall a program
Uninstall EQMS server
Uninstall EQMS client component (if it is installed)

On Client PC
Start - control panel - programs - uninstall a program
Uninstall EQMS client component

Reinstall

If you have registered and activated the product and if you wish to uninstall
Please follow the steps

On Server PC
 - If you wish to uninstall the EQMS server for any reason like Server Shift, Format server then please follow the process
 - Surrender key
 - Take the backup
 - Format the server (if required)
 - Reinstall EQMS (Setup.exe)
 - Restore backup
 - Enter the surrender key
 - And you are good to use EQMS

On Client PC
There is no restriction on number of clients, hence you can uninstall EQMS client and rein-stall it

Other software's

project timesheet
TIMETracker

service crm
service desk

HVAC SOFTWARE

spinso.com