Version 9.0

User’s Manual

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QXpress

QXpress

Introduction

Welcome to QXpress!

This amazing QuickBooks add-on turns your favorite accounting software into powerful industry-specific management software. QXpress improves the overall efficiency of your company and increases its overall profitability. Not only will QXpress meet the management needs of your company now, it will continue to meet, and surpass, those needs well into the future.

QXpress is an industry-leading software package that automates your management functions. Scheduling, invoicing and job costing will all be completed in less time and with more accuracy then you ever thought possible.

When the time comes to increase the power of your QXpress software, you always have the option of adding functionality by introducing QXpress modules. QXpress Networking, Mapping, Bar coding, QX Mobile and the QX Data Collector can all be seamlessly integrated with QXpress once your company is ready for them.

Best of all, behind all of this great software is the QXpress team providing you with unmatched customer service and support. In the event that you have any questions regarding QXpress, please do not hesitate to contact us. We pride ourselves on our ability to surpass our customers' expectations.

Congratulations on taking the first step towards greater efficiency and profitability! You will soon have the best of both worlds - the familiarity of QuickBooks accounting software and the added management power of QXpress scheduling software.

Table of Contents

CHAPTER 1
GETTING SET-UP

This chapter will explain the steps involved in the initial set-up of QXpress.

The topics discussed in this chapter include:

- 1.1 Importing information from QuickBooks
- 1.2 Setting your preferences

1.1 Importing information from QuickBooks

When you open QXpress, your QuickBooks information will be automatically imported into QXpress - there is no importing required on your part. The steps required to open QXpress are outlined below.

To import information from QuickBooks versions US 2002 (and later) Pro, Premier, Enterprise; CAN 2003 (and later) Pro, Premier, Enterprise; Australian 2003 (and later) Pro, Premier, Enterprise; UK 2004 (and later) Pro, Premier, Enterprise:

1) Open QuickBooks and go to your Customer List.

2) From your *Desktop*, double-click on the QXpress icon.

3) If QXpress does not yet have a registration password, the blue evaluation screen will appear:

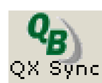
4) If you are evaluating QXpress, click **Continue With Free Trial**. If you have purchased or rented QXpress, click **I'm already a user - Exit**, and fill out

the registration information according to the steps in your QXpress Product Purchase email.

5) Click **Start**.

6) Assuming you have not yet synchronized with QuickBooks, the *Get QB Data* screen will appear:

7) If, however, you have already synchronized with QuickBooks and would like to Synchronize with QuickBooks again, click on the QX Sync icon:



8) Click on the drop-down list to the right of *Which version of QuickBooks do you use* and select the appropriate version of QuickBooks.

9) If given the option, choose whether you want to do a *Full Sync* or a *Changes-only sync*. The *Full Sync* will completely re-import all QuickBooks information into QXpress. On the other hand, a *Changes-only sync* will only refresh QXpress with new QuickBooks information, that was added or modified as of a specified date.

10) Click **Get new QB data**.

11) If this is your first time synchronizing with QuickBooks, a message box will appear in QuickBooks asking you to give QXpress permission to access your QuickBooks information. Read the message and click **Yes, Always**.

12) A second message box will appear. Read the message and click **Yes**.

13) QXpress will now automatically import your QuickBooks information. If you are using QuickBooks Pro 2004 or higher, a “QX Sync” subscription will be added that will automatically keep QXpress up to date with any changes made in QuickBooks.

Note: You will want to run this procedure once on each computer that has QuickBooks and QXpress on it. This will establish the relationship between QuickBooks and QXpress on each computer, which is needed for the real time synchronization of QX Sync.

To import information from QuickBooks versions US 2001 or earlier; or CAN 2001 or earlier:

1) From your *Desktop*, double-click on the QXpress icon.

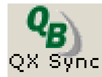
2) If QXpress does not yet have a registration password, the blue evaluation screen will appear:

3) If you are evaluating QXpress, click **Continue With Free Trial**. If you have purchased or rented QXpress, click **I'm already a user - Exit**, and fill out the registration information according to the steps in your QXpress Product Purchase email.

4) Click **Start**.

5) Assuming you have not yet synchronized with QuickBooks, the *Get QB Data* screen will appear:

6) If, however, you have already synchronized with QuickBooks and would like to Synchronize with QuickBooks again, click on the QX Sync icon:



7) Click on the drop-down list to the right of *Which version of QuickBooks do you use* and select the appropriate version of QuickBooks.

8) Click **Browse** and locate your QuickBooks database.

9) Click **Get new QB Data**.

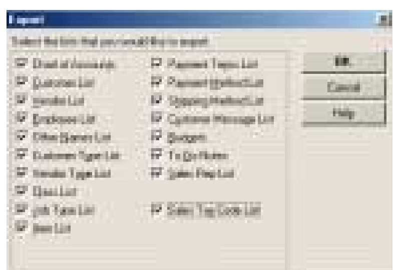
10) QXpress will now automatically import your QuickBooks information.

To import information from QuickBooks versions US 2003 Basic; US 2002 Basic; CAN 2003 Basic; CAN 2002; or AUS 7.0 - AUS 2002:

1) Open QuickBooks.

2) Click **File > Utilities > Export** OR **File > Export** depending on the version of QuickBooks you are using.

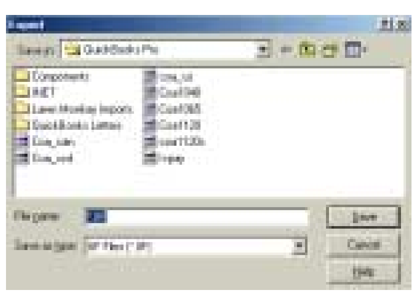
3) The *Export* screen will appear:



4) Place a check inside each of the boxes listed.

5) Click **OK**.

6) The *Export* window will appear:



7) Type a name in the *File name* box.

8) Click **Save**.

9) Open QXpress.

10) If QXpress does not yet have a registration password, the blue evaluation screen will appear:

11) If you are evaluating QXpress, click **Continue With Free Trial**. If you have purchased or rented QXpress, click **I'm already a user - Exit**, and fill out the registration information according to the steps in your QXpress Product Purchase email.

12) Click **Start**.

13) Assuming you have not yet synchronized with QuickBooks, the *Get QB Data* screen will appear:

14) If, however, you have already synchronized with QuickBooks and would like to Synchronize with QuickBooks again, click on the QX Sync icon:

15) Click on the drop-down list to the right of *Which version of QuickBooks do you use* and select the appropriate version of QuickBooks.

16) Click **Browse**, and in the *Select QB file location* window locate the.iif file that you saved from QuickBooks. Click on the file. Click **Open**.

17) Click **Get new QB data**.

18) QXpress will now import your QuickBooks information.

1.2 Setting your preferences

Preferences include company name(s), country of business, and default values. Continue reading this section to learn how to set the various preferences.

1.2.1 Company names

Company name is the name that will appear on invoices and documents generated from QXpress.

To enter your company name:

1) Click **Edit > Preferences**.

2) The *Preferences* screen will appear.

3) Click on the *Invoicing* tab.

4) Enter the appropriate information into the boxes provided.

5) Click **OK**.

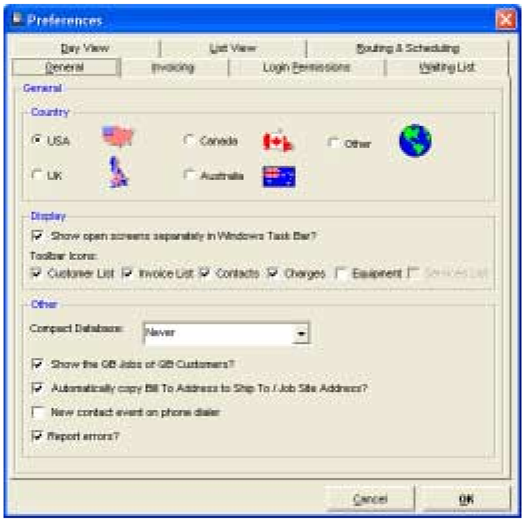
1.2.2 General preferences

The *Preferences* screen enables you to set the fundamental default values that are used throughout QXpress.

To set general preferences:

1) Click **Edit > Preferences**.

2) The *Preferences* screen will appear:



3) Enter the default values into the boxes provided.

4) Click **OK** to save the information and return to the previous screen.

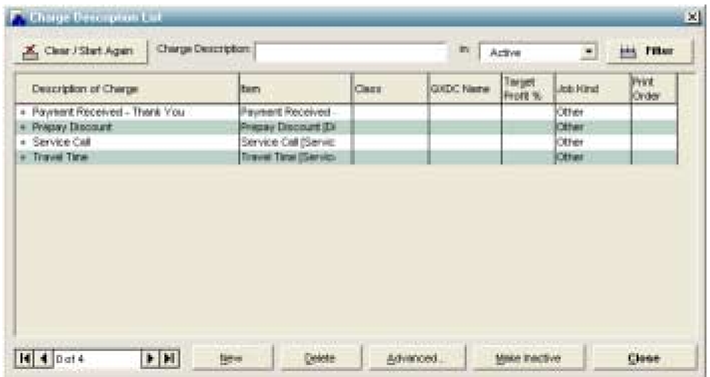
1.2.3 Charge descriptions

Charge descriptions are the names of the services and/or materials that will appear on an invoice. In order to have a service and/or material appear on an invoice, you must first create a charge description in QXpress. Examples of typical charge descriptions include *Weekly Service, General Maintenance* and *Site Visit*.

To add a new charge description:

1) Click **Lists > Charge Description List**.

2) The *Charge Descriptions* screen will appear:



3) Click **New**.

4) A new row will appear.

5) The *Description of Charge* column indicates the name of the charge description being added. Type the name into the column.

6) The *Item* column indicates the QuickBooks item that the charge description will be associated with. Click on the drop-down list and select the appropriate option.

Note: You can also add new QuickBooks items at this step. To do this, click on the drop-down list in step 6 and select *New Item*. The *Add QuickBooks Item* screen will appear. Enter the appropriate information. Click **OK**. The new item will now be available in the drop-down list.

7) The *Class* column indicates the QuickBooks class that the charge description will be associated with. Click on the drop-down list and select the appropriate option. Once a service is invoiced and posted to QuickBooks, the class will be assigned on a per line item basis on the QuickBooks invoice (assuming your QuickBooks invoice template shows the Class column).

8) The *QXDC Name* column indicates the short-form of the charge description that will appear on the QX Data Collector. Type the short-form into the column. This is limited to 10 characters, and must be unique. If you are *not* using the QX Data Collector, you can ignore this column.

9) The *Target Profit %* indicates the percentage profit you want to make on the charge description, of type 'Service', after labor and material expenses have been subtracted. This column allows you to track whether or not you are above or below your target profit. This is not a mandatory field. If you want to track your target profit % type the appropriate number into the column. Otherwise, leave the column blank.

10) The *Job Kind* column indicates the kind of service being added. Enter the job kind by clicking on the drop-down list and selecting the appropriate option. In most cases, the job kind will be *Other*. This is useful if you need QXpress to automatically track the last date a service of a certain kind was done.

11) The *Print Order* column indicates the order that you want the charge description to appear on documents like renewal letters. Make sure that all your Print Order numbers have the same number of digits. As an example, a charge description with print order 001 will appear ahead of a charge description with print order 002 on a renewal letter.

12) Click **Close** to save the information and return to the previous screen.

To edit a charge description:

1) Click **Lists > Charge Description List**.

2) The *Charge Descriptions* screen will appear.

3) Edit the information as required.

4) Click **Close** to save the information and return to the previous screen.

To delete a charge description:

1) In the *Charge Descriptions* screen, highlight the charge description that you want to delete.

2) Click **Delete**.

3) Answer **Yes** to the prompt.

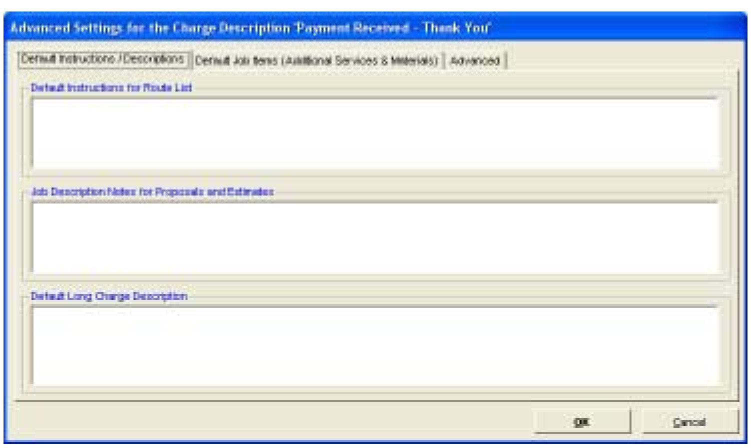
4) Click **Close** to save the information and return to the previous screen.

To enter default instructions that will appear everytime a charge description appears on a route list/work order:

1) In the *Charge Descriptions* screen, click on the appropriate charge description.

2) Click **Advanced**.

3) The *Advanced Charge Descriptions* screen will appear.



4) Type the note into the text box under the heading *Default Instructions for Route List*.

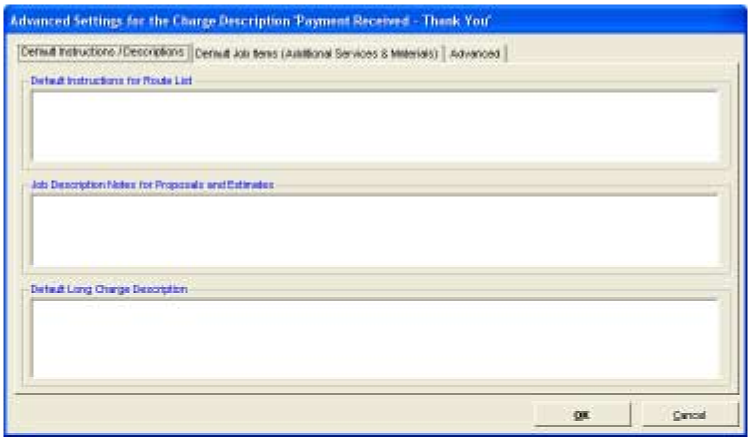
5) Click **OK** to save the information and return to the previous screen.

To enter default notes that will appear everytime a charge description appears in an estimate or proposal:

1) In the *Charge Descriptions* screen, click on the appropriate charge description.

2) Click **Advanced**.

3) The *Advanced Charge Descriptions* screen will appear.



4) Type the note into the text box under the heading *Job Description Notes for Proposals and Estimates*.

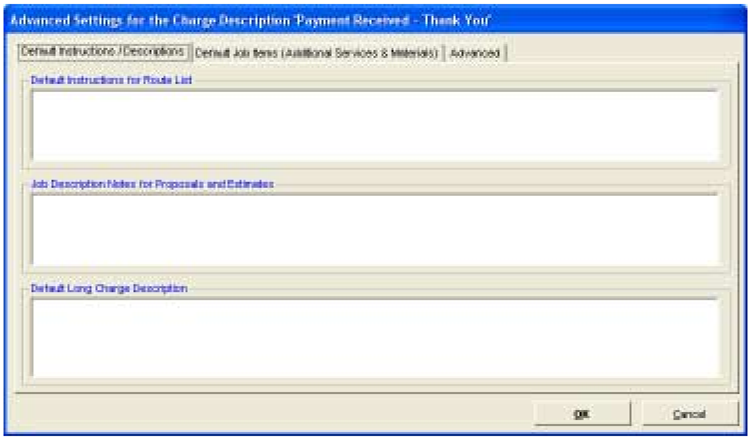
5) Click **OK** to save the information and return to the previous screen.

To enter a default long charge description that will appear automatically for this charge description on invoices:

1) In the *Charge Descriptions* screen, click on the appropriate charge description.

2) Click **Advanced**.

3) The *Advanced Charge Descriptions* screen will appear:



4) Type the note into the text box under the heading *Default Long Charge Description*.

5) Click **OK** to save the information and return to the previous screen.

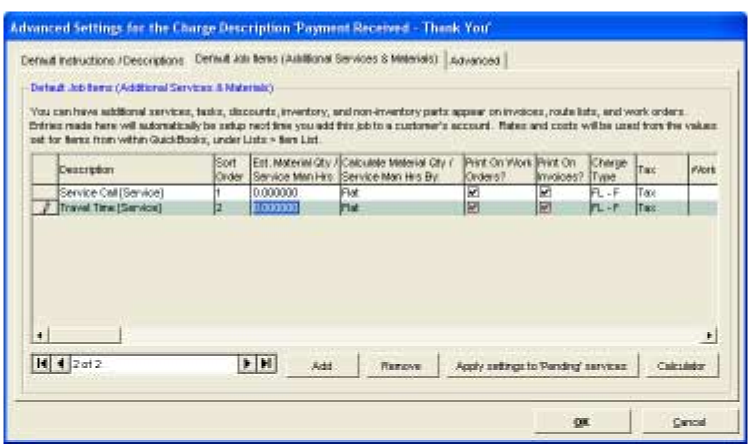
To enter default job items (i.e. services and materials) to a charge description:

A Job Item is an additional service, material or discount that will be included on a service. Default Job Items automatically get inserted when a new service is added. If you commonly use the same Job Items on a certain service, you may want to setup Default Job Items to save you data entry time.

1) In the *Charge Descriptions* screen, click on the appropriate charge description.

2) Click **Advanced**.

3) The *Advanced Charge Descriptions* screen will appear:



4) Click on the *Default Job Items (Additional Services & Materials)* tab.

5) Enter the default job items into the space provided.

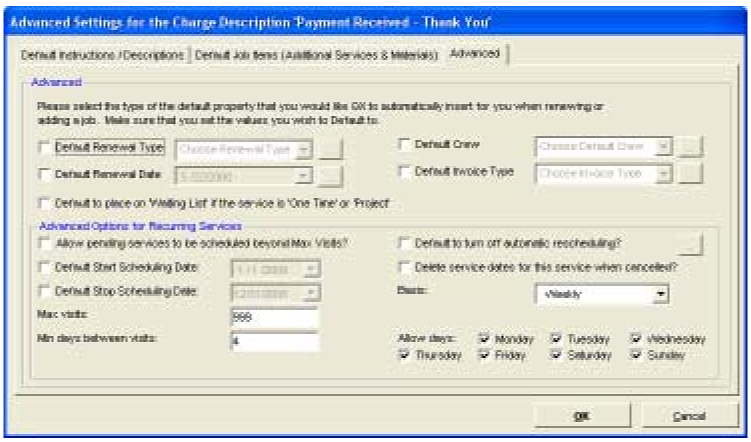
6) Click **OK** to save the information and return to the previous screen.

To enter other default properties to a charge description:

1) In the *Charge Descriptions* screen, click on the appropriate charge description.

2) Click **Advanced**.

3) The *Advanced Charge Descriptions* screen will appear:



4) Click on the *Advanced* tab.

5) Place a check into the checkbox of the default property that you want to set.

6) Enter the appropriate value into the box provided.

7) Click **OK** to save the information and return to the previous screen.

1.2.4 Variable names & classes

Variables are physical characteristics of a job site that will affect the price of the job. Examples of variables include *property square footage, lineal footage of driveways, total paved area, etc.*

To add a new variable name:

1) Click **Lists > Variable Name List**.

2) The *Variable Names* screen will appear:

3) Click **New**.

4) A new row will appear.

5) The *Variable Name* column indicates the name of the variable being added. Type the appropriate name into the column.

6) The *Unit Descrip.* column indicates the unit used to measure the variable. An example of a unit description is *feet*. Type the appropriate description into the column.

7) The *Variable Class* column indicates the class that the variable name belongs to. Enter the class by clicking on the drop-down list and selecting the appropriate option.

Note: If the appropriate class is not shown in the drop-down list select *Add/Edit Variable Class*.

8) Click **OK** to save the information and return to the previous screen.

To edit a variable name:

1) Click **Lists > Variable Names List**.

2) The *Variable Names* screen will appear.

3) Edit the information as required.

4) Click **OK** to save the information and return to the previous screen.

To delete a variable name:

1) In the *Variable Names* screen, highlight the variable name that you want to delete.

2) Click **Delete**.

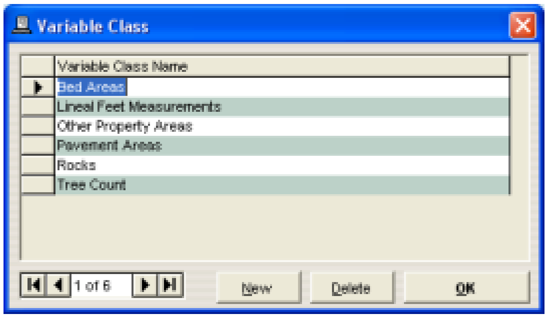
3) Answer **Yes** to the prompt.

4) Click **OK** to save the information and return to the previous screen.

To add a new variable class:

1) Click **Lists > Variable Class List**.

2) The *Variable Class* screen will appear:



3) Click **New**.

4) A new row will appear.

5) The *Variable Class Name* column indicates the name of the variable class being added. Type the appropriate name into the column.

6) Click **OK** to save the information and return to the previous screen.

To edit a variable class:

1) Click **Lists > Variable Class List**.

2) The *Variable Class* screen will appear.

3) Edit the information as required.

4) Click **OK** to save the information and return to the previous screen.

To delete a variable class:

1) In the *Variable Class* screen, highlight the variable class that you want to delete.

2) Click **Delete**.

3) Answer **Yes** to the prompt.

4) Click **OK** to save the information and return to the previous screen.

1.2.5 Creating job packages

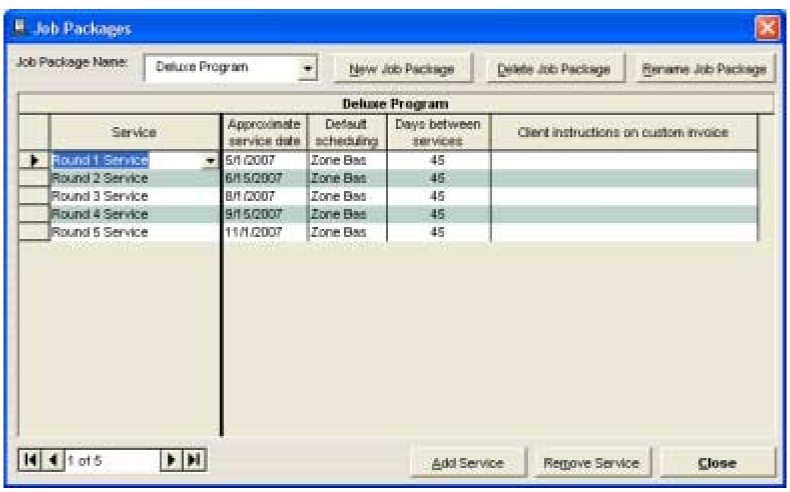
Job packages enable you to combine many individual charge descriptions into one ‘package’ so that all of the individual charge descriptions can be added to a customer’s account simultaneously.

This is usually used by companies that perform several distinct once-a-year services on a property. A good example of how job packages may be used is a lawn spraying company. This type of company often offers a predetermined program such as a 5-step or 8-step program. Rather than having to schedule 5 or 8 services for every customer that signs-up for the program, a lawn spraying company can combine all of the charge descriptions into one job package. Then, when a customer signs up for the program, the company simply has to add one job package and all of the appropriate charge descriptions are added.

To add a new job package:

1) Click **Lists > Job Packages**.

2) The *Job Packages* screen will appear:



3) Click **New Job Package**.

4) Enter the name of the job package into the box provided.

5) Click **OK**.

6) The new job package has now been created.

To add services to the job package:

1) In the *Job Packages* screen, click **Add Service**.

2) A new row will appear.

3) The *Services Name* column indicates the name of the service being added to the job package. Enter the service name by clicking on the drop-down list and selecting the appropriate option.

4) The *Approximate Service Date* column indicates the date that you estimate the work will be completed. **This date has nothing to do with scheduling. It is used for generating projection reports**. Type the appropriate date into the column. For example, if you estimate that the work will be done around June 1, 2007 type *6/1/07* or *June 1, 2007*.

5) The *Default Scheduling* column indicates the type of scheduling that will be used to schedule the service being added. Job Packages are usually used by companies using 'Zone Based' scheduling. To learn more about different types of scheduling read **Chapter 5**. Enter the scheduling type by clicking on the drop-down list and selecting the appropriate option.

6) The *Days Between Services* column indicates the minimum number of days that have to be left between the service being added and the next service of the same 'job kind' that will be done on the property. Type the appropriate number into the column.

7) The *Client Instructions on Custom Invoice* column is for companies that customize their invoice templates and want to have specialized instructions appear on the invoice for their customers to read. If you are not using a custom invoice, leave this column blank.

To rename a job package:

1) In the *Job Packages* screen, click on the drop-down list to the right of *Job Package Name* and select the job package that you want to rename.

2) Click **Rename Job Package**.

3) Enter the new name into the box provided.

4) Click **OK**.

5) Click **Close** to save the information and return to the previous screen.

To delete a job package:

1) In the *Job Packages* screen, click on the drop-down list to the right of *Job Package Name* and select the job package that you want to delete.

2) Click **Delete**.

3) Answer **Yes** to the prompt.

4) Click **Close** to save the information and return to the previous screen.

1.3 Setting login permissions

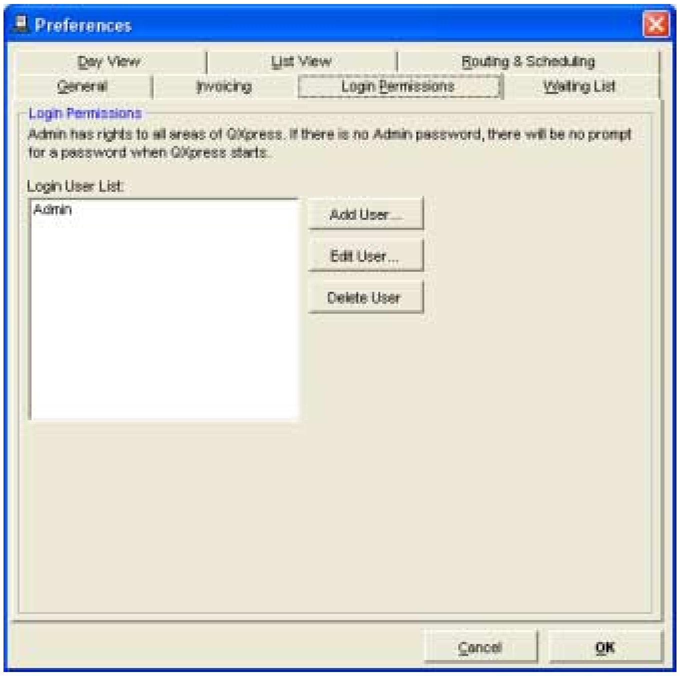
Login Permissions allow you to decide what information each QXpress user can view. This feature is only available in QXpress Platinum and QXpress Enterprise.

Once login permissions are set, users will login using their password and will only be able to view the information you have allowed them access to.

To set the "admin" password:

1) Click **Edit > Preferences**.

2) The *Preferences* screen will appear.



3) Click the *Login Permissions* tab.

4) In the *Login User List*, click *Admin*.

5) Click **Edit User...**

6) The *Setup login user and password* screen will appear.

7) Enter the password and confirmation into the appropriate boxes. **Make sure you write down your password somewhere**.

8) Click **Finish**.

To add new login users:

Note: For login users to be activated, the Admin password must be set.

1) Click **Edit > Preferences**.

2) The *Preferences* screen will appear.

3) Click the *Login Permissions* tab.

4) Click **Add User...**

5) The *Setup login user and password* screen will appear.

6) Click on the *QuickBooks employee* drop-down list and select the appropriate employee. This is optional, but is beneficial because it allows contact manager events to be tied to this login user. That way different users in your company can assign contact manager events in the contact manager to each other. These contact manager events will automatically shown when a user logs in.

7) Enter the login, password and confirmation into the appropriate boxes.

8) Click **Next**.

9) For each option, select either *No Access* or *Access*.

Note: If you want to copy permissions from another user, click **Copy From...**, type the user's name into the box provided and click **OK**.

10) Once you have finished setting permissions, click **Finish**.

11) Click **OK**.

CHAPTER 2
ENTERING CUSTOMER INFORMATION

This chapter explains the customer screen. It will also explain how to enter appropriate information for each customer.

The topics discussed in this chapter include:

- 2.1 Viewing customer accounts
- 2.2 Adding a new customer account
- 2.3 Looking around a customer's account

2.1 Viewing customer accounts

When you enter QXpress, a customer account will already exist for each of the customers that you have in QuickBooks. The steps required to view those accounts are explained below.

To view a customer list:

1) Click **Lists > Customer List**.

2) The *Customer List* screen will appear:

To view a specific customer account:

1) In the *Customer List* screen, do one of the following:

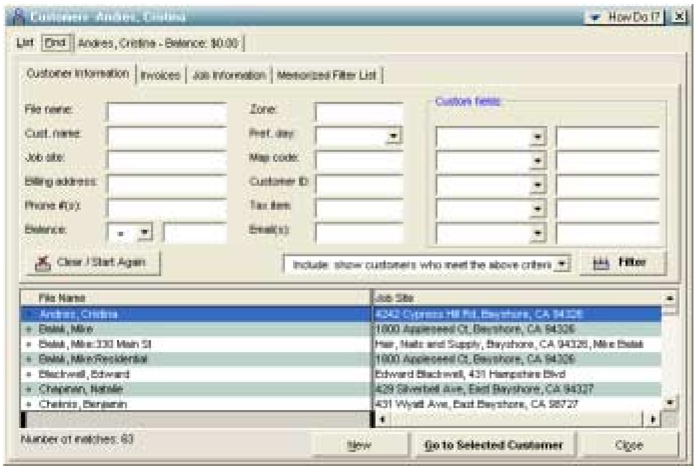
Either highlight the customer account you want to view and click **Go to Selected Customer**...

...OR double-click on the customer account that you want to view.

To use the customer find feature:

1) Click **Lists > Customer List**.

2) The *Customer List* screen will appear:



3) Click on the *Find* tab.

4) Enter your search criteria into the appropriate box. For example, if you want to search based on phone number, type all or part of the customer's phone number into the *Phone #(s)* box.

5) Click **Filter**.

6) All customers that match the criteria will be listed in the box at the bottom of the screen.

7) Highlight the appropriate customer and click **Go to Selected Customer**.

2.2 Adding a new customer account

If you are using QuickBooks version 2002 or later, you can add new customers directly from QXpress into QuickBooks. Adding a customer in QXpress will automatically add the same customer into QuickBooks. The steps for adding a customer account are outlined below. **If you are using a QuickBooks version prior to U.S. QuickBooks 2002 Pro, you must add new customers into QuickBooks and then use QX Sync to re-import the information.**

To add a new customer account:

1) Click **Customers > New QuickBooks Customer**.

2) The *Add QuickBooks Customer* screen will appear.

3) Enter the appropriate information into the boxes provided.

Note: Phone numbers entered with the first 10 digits being numbers will be automatically formatted. For example, if you enter the phone number “5551234567 home”, QXpress will format the number to “(555) 123-4567 home”.

Note: Trying entering the Zip Code before the City and State. If QXpress detects that the City and State fields are empty it will search existing customers with that Zip Code and insert the best match.

4) Click **OK** to save the information and return to the previous screen.

2.3 Looking around a customer’s account

This section will explain the different sections of a customer’s account. It will also tell you how to enter the appropriate information into those sections.

2.3.1 Primary information

Primary information includes all of the customer information that was imported from QuickBooks.This information is displayed in the top half of the customer account (as shown below).

To edit primary information:

Note: You can only edit customer primary information in QXpress if you are using QuickBooks version 2002 or later. Otherwise, you must edit customer information in QuickBooks and click QX Sync to re-import the new information.

1) In the customer account, click **Customer > Edit QuickBooks Customer**.

2) The *Edit QuickBooks Customer* screen will appear:

3) Edit the information as required.

4) Click **OK** to save the information and return to the previous screen.

2.3.2 Schedule

The customer's schedule is displayed when you click on the *Schedule* tab in the middle of the customer's account.

This section of the customer's account displays all of the services and billing installments that are scheduled for a customer. To learn about scheduling services read **Chapter 5**.

2.3.3 History

The customer's history is displayed when you click on the *History* tab in the middle of the customer's account.

This section of the customer's account displays a list of services that have the status of 'Done' for the customer, as well as contact manager events for this customer. To edit this information, double-click on the row you want to edit.

This section also lists up-to-date QuickBooks information. If QuickBooks is open, QXpress will display QuickBooks invoices, payments, credit memos and estimates. If you are using QuickBooks Pro 2004 or greater, you can double-click on a row and be taken directly into that QuickBooks transaction.

2.3.4 Routing & Invoicing

The routing and invoicing options are displayed when you click on the *Routing & Invoicing* tab in the middle of the customer's account.

This section of the customer's account displays options related to routing and invoicing. Each of the options are explained below.

To set a default crew for a customer:

Note: Setting a default crew means that each time a service is added for the customer, the default crew will be assigned the work.

1) In the *Routing & Invoicing* section of the customer account, click on the drop-down list to the right of *Default Crew* and select the appropriate option.

To enter a map code for a customer:

Note: Map codes are reference numbers that your company uses to locate a customer's job site on a map or in a map book. By entering the customer's map code, you can have it automatically print onto route lists/work orders for that customer.

1) In the *Routing & Invoicing* section of the customer account, type the map code into the box to the right of *Map Code*.

To enter a sort code for a customer:

Note: Sort codes determine the order that services will be completed. For example, a customer with a sort code of *10* will be scheduled ahead of a customer with sort code *20*. Route sheets and work orders are printed in the sort code order.

To understand sort codes, imagine you were going to service all of your customers in one day, using one truck. Put your customers in order that you would visit them. Give the customer at the top of the list sort code *10*, give the second customer sort code *20* and so on.

1) In the *Routing & Invoicing* section of the customer account, click on the **Details** button to the right of *Sort Code*.

2) The *Sort Code Router* screen will appear:

3) The *Sort Code* column indicates the sort code assigned to the customer. Type the appropriate number into the column.

4) Click **OK** to save the information and return to the previous screen.

To enter a default preferred day for a customer:

Note: Entering a default preferred day for a customer means that any time a service is scheduled for the customer, the preferred day for that service will automatically be set to the default preferred day.

1) In the *Routing & Invoicing* section of the customer account, click on the drop-down list to the right of *Pref. Day* and select the appropriate option.

To enter a zone for a customer:

Note: Zones are a way of sub-dividing your service area. For companies that will be scheduling by zone, it is necessary to enter a zone for each customer. If you will <u>not</u> be using zone-based scheduling, you do <u>not</u> have to enter a zone for each customer.

1) In the *Routing & Invoicing* section of the customer account, type the appropriate zone into the box to the right of *Zone*.

To enter a customer's property size / customer variables:

1) In the *Routing & Invoicing* section of the customer account, click on the **Details** button to the right of *Property Size*.

2) The *Customer Variables* screen will appear.

3) Click **Add**.

4) A new row will appear.

5) The *Variable Name* column indicates the name of the variable that you are entering. Click on the drop-down list and select the appropriate option.

Note: If the appropriate variable is not shown in the drop-down list, select *Add/Edit Variable Names* and add a new variable name.

Note: Make sure that Variable names that pertain to the property size of the customer are entered into the existing Variable Class: 'Property Size'.

6) The *Quantity* column indicates the quantity of the measurement. Type the appropriate quantity into the column.

7) Click **OK** to save the information and return to the previous screen.

To indicate that a customer will receive open invoicing:

1) In the *Routing & Invoicing* section of the customer account, place a check inside the box to the left of *Open Invoicing: Previous Balances on Invoices?*

2) Now, whenever you generate invoices for the customer, a previous balance will be included in the total amount due (when printed out of QXpress).

To include a customer's charges on another customer's invoice (i.e. to bill multiple job sites on one invoice):

1) In the *Routing & Invoicing* section of the customer account, remove the check from the box to the right of *Send to Customer*.

2) A new box will appear.

3) Click on the **Details** button and select the customer that you want the charges to be billed to.

4) Now, whenever the customer is invoiced, those charges will appear on the other customer's invoice.

Note: If you wish to bill one customer's services to another customer, but have already scheduled services for that customer, you must manually go into each service and each 'Done' or 'On Route' service date and manually change the Bill To checkbox.

To set a default invoice type for a customer:

1) In the *Routing & Invoicing* section of the customer account, click on the drop-down list to the right of *Default Invoice Type* and select the appropriate option. To learn about the different types of invoicing see **Chapter 8**.

2) Now, whenever a service is added to the customer's account the invoice type for that service will automatically be set to the default invoice type.

To edit a customer's E-mail address:

1) Click **Customer > Edit QuickBooks Customer**.

2) The *Edit QuickBooks Customer* screen will appear.

3) Edit the E-mail information as required.

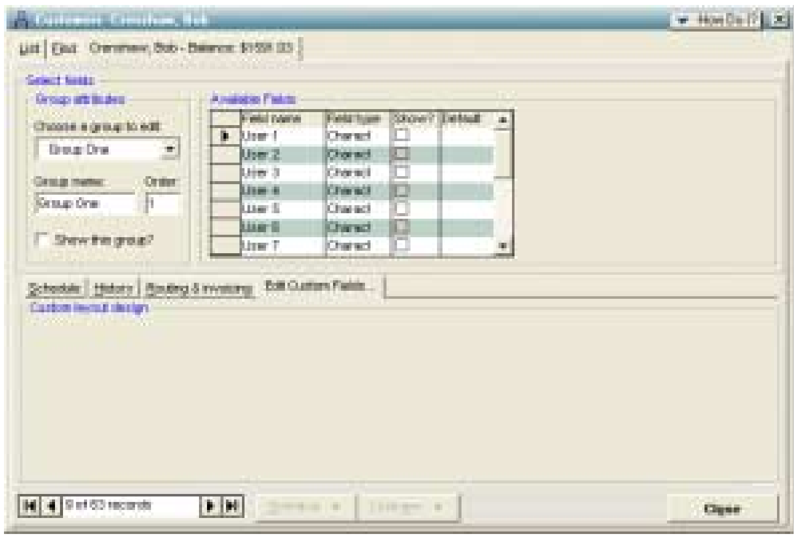
4) Click **OK** to save the information and return to the previous screen.

2.3.5 Custom Fields at the customer level

Custom fields, available on QXpress Gold, Platinum and Enterprise, enable you to create your own sections of the customer screen that display information that is specific to your company. QXpress provides up to 10 groups of custom fields. Under each group you can add 15 custom fields that can hold text, numbers, dates, times or drop-down lists - any information that your company needs to track.

To add a custom field group to the customer account:

1) In the customer account, click on the *Edit Custom Fields* tab (as shown below).



2) Click on the drop-down list beneath the heading *Choose a group to edit* and select the group that you want to work with.

3) Type the name of the group into the *Group Name* box. For example, if the group will track additional customer information, enter *Additional Information* into the box.

4) Place a check inside the *Show this group* checkbox.

5) The group will now be displayed in all customer accounts.

To hide a custom field group:

1) In the customer account, click on the *Edit Custom Fields* tab.

2) Click on the drop-down list beneath the heading *Choose a group to edit* and select the group that you want to hide.

3) Remove the check from the *Show this group* checkbox.

4) The group will no longer appear in any customer accounts.

To add a custom field:

1) In the customer account, click on the *Edit Custom Fields* tab.

2) Click on the drop-down list beneath the heading *Choose a group to edit* and select the group that you want to add a field to.

3) Click on one of the fields listed beneath the heading *Available Fields*.

4) Place a check inside the *Show* checkbox.

5) Type the name of the field into the *Field Name* box.

6) Click on the drop-down list beneath the heading *Field Type* and select the type of field.

7) Type the default value for the filed into the *Default Value* box. The default value will automatically be entered for every customer.

8) Under the *Custom Layout Design* frame, drag the custom field to position. You can also drag the corners to make the field wider and taller.

To edit a field in a custom field group:

1) In the customer account, click on the *Edit Custom Fields* tab.

2) Click on the drop-down list beneath the heading *Choose a group to edit* and select the group that you want to add edit a field for.

3) Click on the appropriate field under the heading *Available Fields*.

4) Edit the field information as required.

5) The information will automatically be updated in all customer accounts.

To hide a field in a custom field group:

1) In the customer account, click on the *Edit Custom Fields* tab.

2) Click on the drop-down list beneath the heading *Choose a group to edit* and select the group that contains the field you want to hide.

3) Click on the field you want to hide beneath the heading *Available Fields*.

4) Remove the check from the *Show* checkbox.

5) This field will no longer appear in the custom field group.

CHAPTER 3
ENTERING CREW / ROOM / TEAM / TECH / TRUCK INFORMATION

This chapter explains the different types of information that QXpress tracks regarding work crews.

Note: QXpress allows you to change the Crew Vocabulary from “Crew” to either “Room”, “Team”, “Tech” or “Truck”. This manual, however, will always use the term “Crew”.

The topics discussed in this chapter include:

- 3.1 Setting up crews
- 3.2 Setting up crew groups
- 3.3 Blocking Crew Availability

3.1 Setting up crews

QXpress automatically imports all of your employee information from QuickBooks - therefore, you do not have to re-enter any employee information. However, you will have to arrange your employees into crews for scheduling and job tracking purposes. The steps required to properly set-up your crews are outlined below.

To change your Crew Vocabulary:

1) Click **Edit > Preferences**.

2) Click on the *Routing & Scheduling* tab.

3) From the *Crew Vocabulary* dropdown list, choose either “Crew”, “Room”, “Team”, “Tech” or “Truck”.

4) Click **OK**.

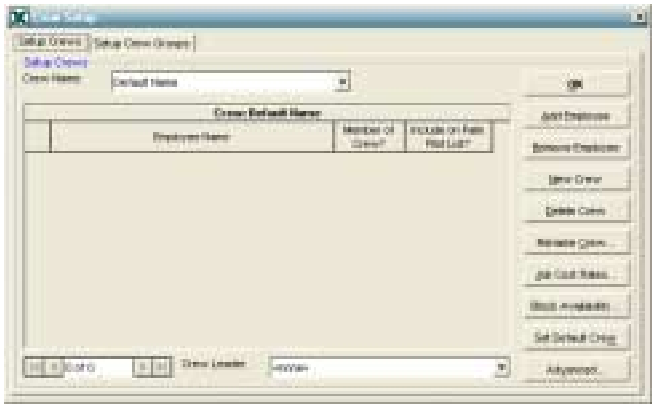
5) Close and reopen QXpress for these changes to take full effect.

Note: “Crew”, “Room”, “Team”, “Tech” and “Truck” are your only options. There is no way to edit the Crew Vocabulary in QXpress to a name other than these options.

To add a new crew:

1) Click **Lists > Crews**.

2) The *Crew Setup* screen will appear:



3) Click **New Crew**.

4) Enter the crew name into the box provided.

5) Click **OK**.

6) The crew has now been created. You can enter the crew leader at the bottom of the screen if desired. The crew name will appear in the 'Day View' and 'Week View' in My Calendar, so make sure you enter a descriptive crew name.

To add an employee to a crew:

1) In the *Crew Setup* screen, enter the crew that the employee will be added to into the *Crew* box.

2) Click **Add Employee**.

3) A new row will appear.

4) The employee name column indicates the name of the employee that you are adding to the crew. Click on the drop-down list and select the appropriate option. The list of employees comes from QuickBooks. If you need to add an employee to this crew that is not currently listed, you must first add the employee to QuickBooks, and reopen QXpress.

5) Click **OK** to save the information and return to the previous screen.

To enter a job cost rate for an employee:

1) In the *Crew Setup* screen, highlight the employee that you want to enter a job cost rate for.

2) Click **Job Cost Rates...**

3) The *Employee Job Cost Rates* screen will appear.

4) Type the appropriate job cost rate into the *Job Cost Rate/Hr* column. The *Job Cost Rate* is how much an employee costs you per hour. This may be just rate you pay them per hour, or it may also include other costs like workman's compensation, or your company's overhead per hour calculation.

5) You may also enter a rate into the Custom Rate 1 and Custom Rate 2 fields if you like. This is often used by companies who create advanced Template Designer reports to calculate commissions payable to employees.

6) Click **OK** to save the information and return to the previous screen.

To change an employee's QXDC name:

1) In the *Crew Setup* screen, highlight the employee that you want to enter a job cost rate for.

2) Click **Job Cost Rates...**.

3) The *Employee Job Cost Rates* screen will appear.

4) Type the new QXDC name into the *QXDC Name* column. The QXDC Name must be unique.

5) Click **OK** to save the information and return to the previous screen.

To remove an employee from a crew:

1) In the *Crew Setup* screen, highlight the employee that you want to remove from the crew.

2) Click **Remove Employee**.

3) Click **OK** to save the information and return to the previous screen.

To rename a crew:

1) In the *Crew Setup* screen, click on the *Crew* drop-down list and select the appropriate crew.

2) Click **Rename Crew...**

3) Enter the new name into the box provided.

4) Click **OK**.

To delete a crew:

Note: By default, QXpress starts with crews ‘Default Crew’ and ‘Not Assigned’. If you wish to delete these crews, you must first click **Advanced** and change the default crews under the *New Services* tab to crews other than the ones you wish to delete.

1) In the *Crew Setup* screen, choose the crew from *Crew* drop-down box.

2) Click **Delete Crew**.

3) Answer **Yes** to the prompt.

4) Click **OK** to save the information and return to the previous screen.

3.2 Setting up crew groups

Crew Groups enable you to view a select group of crews in My Calendar. For example, if you have two divisions (Division 1 and Division 2), crew groups enable you to only view the crews associated with Division 1 or Division 2 - instead of viewing all of the crews.

To add a new crew group:

1) Click **Lists > Crews**.

2) The *Crew Setup* screen will appear.

3) Click the *Setup Crew Groups* tab:

4) Click **New Crew Group**.

5) Type the name of the crew group into the box provided.

6) Click **OK**.

To add crews to a crew group:

1) Click **Lists > Crews**.

2) The *Crew Setup* screen will appear.

3) Click the *Setup Crew Groups* tab.

4) Click on the *Crew Group* drop-down box and select the appropriate crew group.

5) Click **Add Crew**.

6) Click on the drop-down list provided and select the appropriate crew.

7) Click **OK**.

To remove crews from crew group:

1) Click **Lists > Crews**.

2) The *Crew Setup* screen will appear.

3) Click the *Setup Crew Groups* tab.

4) Click on the *Crew Group* drop-down box and select the appropriate crew group.

5) Under the *Crew* heading, click on the crew you want to remove.

6) Click **Remove Crew**.

7) Click **OK**.

To show services assigned to a crew group in My Calendar:

1) In My Calendar, click on the *Crew* drop-down list and select the appropriate crew group. Only services assigned to crews in the selected crew group will appear in My Calendar.

To limit the crew groups that users can view:

1) Read **Section 1.3** that explains how the QXpress Platinum and QXpress Enterprise versions can limit access to certain users with Login Permissions.

2) For each user, use the *Limit Crew Groups* feature in the Login Permissions screen to select the crew groups they can view.

To rename a crew group:

1) Click **Lists > Crews**.

2) The *Crew Setup* screen will appear.

3) Click the *Setup Crew Groups* tab.

4) Click on the *Crew Group* drop-down box and select the appropriate crew group.

5) Click **Rename...**.

6) Enter the new name into the box provided.

7) Click **OK**.

To delete a crew group:

1) Click **Lists > Crews**.

2) The *Crew Setup* screen will appear.

3) Click the *Setup Crew Groups* tab.

4) Click on the *Crew Group* drop-down box and select the appropriate crew group.

5) Click **Delete Crew Group**.

6) Answer **Yes** to the prompt.

7) Click **OK**.

3.3 Blocking Crew Availability

If you are using the Day or Week View calendar, you can block off certain days and times that a crew is not available, as well as give a reason for the lack of availability.

The blocked off time will appear as a blacked-out appointment area in the calendar.

To block off crew availability:

1) Click **Lists > Crews**.

2) Choose the crew you want to block availability for from the *Crew Name* dropdown list.

3) Click **Block Availability**.

4) Click **Add**.

5) Choose the From and To date range you wish to block.

6) Choose the times you wish to block.

7) Select which days of the week you wish to block.

8) Enter a reason for the lack of availability, such as ‘Vacation’, ‘doesn’t work Wednesdays’, etc.

9) Select any additional crews you wish to block availability for.

10) Click **OK**.

11) Click **OK**.

12) Click **OK**, to return to My Calendar.

To edit a blocked-off crew availability:

1) Double-click on the black area on the calendar representing the blocked-off crew availability.

2) Make any edits as necessary.

3) Click **OK**.

CHAPTER 4
ENTERING EQUIPMENT INFORMATION

This chapter explains the different types of information that QXpress tracks regarding your company's equipment. It also explains how to enter the information into the software.

The topics discussed in this chapter include:

- 4.1 Adding a new equipment account
- 4.2 Tracking equipment usage (mileage/hour log)
- 4.3 Scheduling equipment maintenance
- 4.4 Generating an equipment list
- 4.5 Showing the Equipment tab in the Customer screen
- 4.6 Showing the Equipment column in the Service screen

4.1 Adding a new equipment account

Before you can begin entering equipment information, you must first add a new equipment account. This is done by following the steps below.

To add a new equipment account:

1) Click **Lists > Equipment List**.

2) The *Equipment* screen will appear.

3) Click on the *Detail* tab.

4) Click **Equipment > New**.

5) Enter the appropriate information into the boxes provided.

6) Click **Close** to save the information and return to the previous screen.

4.2 Tracking equipment usage (mileage/hour log)

The *mileage/hour loge* enables you to track equipment usage in terms of the total number of hours or total number of miles. The steps required to make a mileage/hour log are outlined below.

To add an entry to the mileage/hour log:

1) In the *Equipment* screen, click **Equipment > Mileage/Hour Log**.

2) The *Mileage/Hour Log* screen will appear.

3) Click **New**.

4) A new row will appear.

5) The *Date* column indicates the date that you are making the entry for. Type the appropriate date into the column. For example, if you want to enter September 12, 2008 type *9/12/08* or *Sept12, 2008*.

6) The *Total Hours Meter* column indicates the reading on the equipment's total hours meter.

7) The *Odometer* column indicates the reading on the equipment's odometer.

8) The *Memo* column enables you to enter a note about this particular entry.

9) Click **OK** to save the information and return to the previous screen.

To delete an entry from the mileage/hour log:

1) In the *Mileage/Hour Log* screen, highlight the entry that you want to remove.

2) Click **Remove**.

3) Answer **Yes** to the prompt.

4) Click **OK** to save the information and return to the previous screen.

4.3 Scheduling equipment maintenance

You can use the contact manager feature in QXpress to set-up reminders for your equipment maintenance. To learn about using the contact manager, read **Chapter 9**.

4.4 Generating an equipment list

From the *Equipment* screen, you can print out the information for a specific piece of equipment or for every piece of equipment entered into QXpress. The steps to print an equipment list are outlined below.

To print the information for a specific piece of equipment:

1) In the *Equipment* screen, click **Equipment > Equipment List**.

2) A prompt will appear, click **Yes**.

To print a report showing the information for all of your equipment:

1) In the *Equipment* screen, click **Equipment > Equipment List**.

2) A prompt will appear, click **No**.

4.5 Showing the Equipment tab in the *Customer* screen

You can assign certain pieces of equipment to certain customers. This is often helpful if you need to track equipment on your Customer's property, whether it is owned by you or by your Customer.

To show or hide the Equipment tab in the *Customer* screen:

1) Click **Edit > Preferences**.

2) Click on the *Routing and Scheduling* tab.

3) To show the Equipment tab, ensure there is a check in the *Show the Equipment tab in the customer screen?* checkbox. To hide the Equipment tab, ensure there is not a check in the *Show the Equipment tab in the customer screen?* checkbox.

4) Click OK.

4.6 Showing the Equipment column in the *Service* screen

You can assign certain pieces of equipment to certain tasks or *Job Items* of a service. This is often helpful if you need to schedule recurring services to be done for specific equipment stored on customer properties, such as heating system, air conditioning units, or computers.

To show or hide the Equipment tab in the *Service* screen:

1) Click **Edit > Preferences**.

2) Click on the *Routing and Scheduling* tab.

3) To show the Equipment column in the Job Items tab of the *Service* screen, ensure there is a check in the *Show the Equipment column in the Job*

Items tab? checkbox. To hide the Equipment column, ensure there is not a check in the *Show the Equipment column in the Job Items tab?* checkbox.

4) Click **OK**.

CHAPTER 5
SETTING UP BILLING INSTALLMENTS AND SCHEDULING SERVICES

This chapter explains how to set-up billing installments and schedule services for customers. Setting up billing installments provides a quick and easy way to bill customers fixed monthly rates. Scheduling services enables you to automate your scheduling by having QXpress create your daily route lists and work orders for you.

The topics discussed in this chapter include:

- 5.1 Setting up a monthly billing installment
- 5.2 Scheduling a recurring service
- 5.3 Scheduling a zone-based service
- 5.4 Scheduling an appointment/one-time service
- 5.5 Scheduling a project
- 5.6 Scheduling job packages
- 5.7 Using custom fields for services
- 5.8 Importing a QuickBooks Estimate
- 5.9 Conflict checking
- 5.10 Appointment Colors

5.1 Setting up a monthly billing installment

Monthly billing installments enable you to automatically invoice customers the same amount each month. For example, if you charge Mrs. Smith $200 a month for the services that you provide, regardless of how many service visits you make, you will set-up a monthly billing installment for Mrs. Smith. If you do not have a fixed monthly rate, but instead charge a price per visit, you can skip this section and move onto section 5.2.

To set-up a new billing installment:

1) In the *Customer* screen, click **Schedule > New Service or Billing Installment**.

2) The *New Schedule* screen will appear.

3) Click on the drop-down list below the heading *Type* and select *Billing Installment*.

4) Click on the drop-down list to the right of *Charge Description* and select the appropriate charge description.

Note: If the appropriate charge description is not shown in the drop-down list, click on the **Details** button and add a new charge description.

5) Click **OK**.

6) The *Billing Installment Series* screen will appear.

7) The *Bill To* checkbox indicates the customer that will be billed for this billing installment.

   If the current customer will be billed for the billing installment, leave the check inside the checkbox.

   If another customer will be billed for the billing installment, remove the check from the checkbox and enter the appropriate customer into the box provided.

8) The *Description* box displays the name of the billing installment being added.

9) The *Invoice type* box indicates the current invoice type for the billing installment. To change the invoice type, click on the drop-down list and select the appropriate option. To learn more about invoice types, read **Chapter 8**.

10) The *Rate/Price* box indicates the amount you charge the customer each month. Type the appropriate price into the box.

11) The *Status* box indicates the current status of the billing installment.

12) The *Crew* box indicates the crew that is responsible for the billing installment. Enter the crew by clicking on the drop-down box and selecting the appropriate option.

13) The *Sales Rep.* box indicates the QuickBooks employee who sold the billing installment. Enter the sales rep. by clicking on the drop-down list and selecting the appropriate option.

14) The *Prepaid* checkbox indicates whether or not the customer has already paid for the billing installment.

   If the customer has already paid for the billing installment, place a check inside the checkbox.

If the customer has <u>not</u> already paid for the billing installment, do <u>not</u> place a check inside the checkbox. In this case, the billing installment will be billed normally.

15) Click **OK** to save the information and return to the previous screen.

To set the billing dates for a billing installment:

1) In the *Billing installment series* screen, click on the *Recurring Dates* tab.

2) The *Start/Stop Billing* boxes indicate the dates that you want to start/stop billing the customer. For example, if you want to bill the customer for the entire year you will enter *1/1/07* into the *Start Billing* box and *12/31/07* into the *Stop Billing* box. Enter the start/stop dates by clicking on the drop-down list and using the calendar provided.

3) The *Renewal Type* box indicates how the billing installment will be renewed. Enter the renewal type by clicking on the drop-down list and selecting the appropriate option.

   If the billing installment is going to be renewed next year, select *Automatically*. In this case, the billing installment will automatically be rescheduled for next year on the *Renewal Date*.

   If you are unsure if the billing installment is going to be renewed next year, select *Prompt*. In this case, QXpress will ask you about the status of the billing installment on the *Renewal Date*.

   If the billing installment will <u>not</u> be renewed next year, select *Don't Renew*.

4) The *Renewal Date* box indicates either 1) the date that the billing installment will be automatically renewed or 2) the date that QXpress will prompt you about the renewal status of the billing installment. Enter the renewal date by clicking on the drop-down list and using the calendar provided.

5) The *Which Dates of the Month* section indicates the date(s) of the month that you want to bill the customer. Enter the appropriate date(s) by placing a check inside the appropriate checkbox.

6) The *Allow Which Months* section indicates the months that you will bill the customer.

   If you will bill the customer all months of the year, click *All Months*.

   If you will only bill the customer certain months of the year, click *Choose*. A list of checkboxes will appear. Remove checks from the checkboxes corresponding to the months that you will <u>not</u> bill the customer.

7) Click **Generate Dates**. The scheduled billing dates will be listed.

8) Click **OK** to save the information and return to the previous screen.

To edit a billing installment:

1) In the *Customer* screen, highlight the billing installment that you want to edit.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *Billing installment series* screen will appear.

4) Edit the information as required.

5) Click **OK** to save the information and return to the previous screen.

To delete a billing installment:

1) In the *Customer* screen, highlight the billing installment that you want to delete.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *Billing installment series* screen will appear.

4) Click on the *General* tab.

5) Click **Activities > Delete**.

6) Answer **Yes** to the prompt.

7) Click **OK**.

5.2 Scheduling a recurring service

Recurring services include those services that you provide at a regular interval. For example, any service that is provided weekly, bi-weekly or monthly is considered a recurring service and will be scheduled following the steps outlined below.

To schedule a new recurring service:

1) In the *Customer* screen, click **Schedule > New Service or Billing Installment**.

2) The *New Schedule* screen will appear.

3) Click on the drop-down list below the heading *Type* and select *Recurring service*.

4) Click on the drop-down list to the right of *Charge Description* and select the appropriate option.

Note: If the appropriate charge description is not shown in the drop-down list, click on the **Details** button and add a new charge description.

5) Click **OK**.

6) The *Recurring service series* screen will appear.

7) The *Bill To* checkbox indicates the customer that will be billed for this service.

   If the current customer will be billed for the service, leave the check inside the checkbox.

   If another customer will be billed for the service, remove the check from the checkbox and enter the appropriate customer into the box provided.

8) The *Description* box displays the name of the service being added.

9) The *Invoice type* box displays the current invoice type for the service. To change the invoice type, click on the drop-down list and select the appropriate option. To learn more about invoice types, read **Chapter 8**.

10) The *Rate/Price* box indicates the amount you charge the customer each time you provide the service. Type the appropriate price into the box.

11) The *Qty* box is usually used if you are billing a rate per hour. In this case, enter the hourly rate into the *Rate/price* box and enter the number of hours into the *Qty.* box.

12) The *Status* box indicates the current status of the service.

13) The *Crew* box indicates the crew that is responsible for the service. Indicate the crew that will provide the service by clicking on the drop-down box and selecting the appropriate option.

14) The *Sales Rep.* box indicates the QuickBooks employee (sales rep.) who sold the service. Enter the sales rep. by clicking on the drop-down list and selecting the appropriate option.

15) The *Prepaid* checkbox indicates whether or not the customer has already paid for the service.

If the customer has already paid for the service, place a check inside the checkbox. In this case, the charge will be deducted from the customer's balance.

If the customer has not already paid for the service, do not place a check inside the checkbox. In this case, the charge will be billed normally.

16) The *Under Contract* checkbox indicates whether or not this service is included as part of an existing billing installment.

If the service is included as part of an existing billing installment, place a check inside the checkbox. In this case, the service will appear as a zero amount on the customer's invoice or it will not be included on the invoice at all.

If the service is not included as part of an existing billing installment, do not place a check inside the checkbox. In this case, the service will be invoiced normally.

17) The *Start/Until* boxes are used if the service is being scheduled for a specific time of day. In this case, type the start/until times into the appropriate box. For example, if the service is going to start at 9a.m. type *9am* into the *Start* box.

18) The *Window* box indicates to the variation that is acceptable between the entered *Start* time and the time that the crew actually arrives at the job site. You can modify your route list template to show the *Window* specified.

19) The *Instructions for Crew* box provides space for you to type notes about the service to your crew. All notes entered into this box will appear on the crew's route list.

20) Click **OK** to save the information and return to the previous screen.

To set the service dates for a recurring service:

1) In the *Recurring service series* screen, click on the *Recurring Dates* tab.

2) The *Basis* section indicates the interval that you want to use to schedule the service. Enter the interval by clicking on the appropriate option.

3) The *Preferred Day of Week* box indicates the day of the week that you provide the service. Enter the preferred day by clicking on the drop-down list and selecting the appropriate option.

4) The *Minimum Days Between Visits* box indicates the least number of days that must be left between the last time you provided the service and the next time that you are going to provide the service. Enter the minimum number of days by typing the appropriate number into the box.

5) The *Start/Stop Scheduling* boxes indicate the dates that you want to start/stop scheduling the service. For example, if you want to schedule the service for the entire year, you will enter *1/1/07* into the *Start Scheduling* box and *12/31/07* into the *Stop Scheduling* box. Enter the start/stop dates by clicking on the drop-down list and using the calendar provided.

6) The *Renewal Type* box indicates how the service will be renewed. Enter the renewal type by clicking on the drop-down list and selecting the appropriate option.

   If the service is going to be renewed next year, select *Automatically*. In this case, the service will automatically be rescheduled for next year on the *Renewal Date*.

   If you are unsure if the service is going to be renewed next year, select *Prompt*. In this case, QXpress will ask you about the status of this service on the *Renewal Date*.

   If the service will <u>not</u> be renewed next year, select *Don't Renew*.

7) The *Renewal Date* box indicates either 1) the date that the service will be automatically renewed or 2) the date that QXpress will prompt you about the renewal status of the service. Enter the renewal date by clicking on the drop-down list and using the calendar provided.

8) The *Maximum # of visits* box indicates the greatest number of times that you want to provide the service in one year. For example, if you limit the total number of visits in one year to *twenty-five* you will enter *25* into the box. Type the appropriate number into the box.

Note: You can use the *Maximum # of visits* box to handle *Charge Over Max* scenarios. In other words, if you service a customer under contract up to a maximum number of visits, and you want to bill the customer additionally for every visit over the maximum, enter the maximum number of visits into this box. Then, activate the *Extend Contracts* feature by clicking **Edit > Preferences**. Click the *Routing & Scheduling* tab and place a check inside the *Extend Contracts: warn at startup when 'Done to date' = 'Max Visits'.* Once you have done this, QXpress will indicate when a customer has exceeded their maximum number of visits. If you decide to continue scheduling services for this customer, the cost of those services will be billed in addition to the contract price. To learn more about the *Extend Contract* feature, please watch the movies on the industry *Snow Removal*.

9) The *Turn off Automatic Rescheduling for this service* check box allows you to gain full control over rescheduling. If this checkbox is checked, QXpress

will ignore the *minimum days between visits* and will not make any attempt to move future dates when jobs are rescheduled.

10) Click on the *Allow...* tab.

11) The *Allow Which Days* section indicates the days of the week that the service can be scheduled for.

    If the service can be scheduled for any day of the week, click *All Days*.

    If the service can only be scheduled on certain days, click *Choose*. Only place checks in the checkboxes next to the days that the service can be scheduled for. For example, if you only work Monday-Friday, only place checks inside those checkboxes.

12) The *Allow Which Weeks* section indicates the weeks in a month that the service can be scheduled for.

    If the service can be scheduled for any week in a month, click *All Weeks*.

    If the service can only be scheduled on certain weeks, click *Choose*. Only place checks in the checkboxes next to the weeks that the service can be scheduled for. For example, if you only want the service to be scheduled for the first week of each month, only place a check inside that checkbox.

13) The *Allow Which Months* section indicates the months in a year that the service can be scheduled for.

    If the service can be scheduled for any month in the year, click *All Months*.

    If the service can only be scheduled in certain months, click *Choose*. Only place checks in the checkboxes next to the months that the service can be scheduled for. For example, if you only want the service to be scheduled for the first six months of the year, only place a check inside those checkboxes.

14) Click **Generate Dates**. The scheduled service dates will be listed.

15) Click **OK** to save the information and return to the previous screen.

To edit a recurring service:

1) In the *Customer* screen, highlight the recurring service that you want to edit.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *Recurring service series* screen will appear.

4) Edit the information as required.

5) Click **OK** to save the information and return to the previous screen.

To delete a recurring service:

1) In the *Customer* screen, highlight the recurring service that you want to delete.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *Recurring service series* screen will appear.

4) Click on the *General* tab.

5) Click **Activities > Delete**.

6) Answer **Yes** to the prompt.

7) Click **OK** to save the information and return to the previous screen.

5.3 Scheduling a zone-based service

Zone-based scheduling is used to schedule services which are done in order of zone or area. There are two steps to zone-based scheduling. The first step is adding the service to a customer's account. In this step, you are indicating that the customer is going to receive the service at some point in the future. The second step is 'fetching' the service when you are going to visit the customer's zone/area. In this step, you ask QXpress to show you all of the customers, in a particular zone, that have ordered the service. In return, QXpress places all of the appropriate customers onto the day's route list.

The steps involved in zone-based scheduling are explained below.

To ensure zone-based scheduling is turned on:

1) Click **Edit > Preferences**.

2) Click on the *Routing & Scheduling* tab.

3) Ensure there is a check in the *Show Zone Based as a scheduling option* checkbox.

4) Click **OK**. You may need to close and reopen QXpress for changes to take full effect.

To add a new zone-based service to a customer:

1) In the *Customer* screen, click **Schedule > New Service or Billing Installment**.

2) The *New Schedule* screen will appear.

3) Click on the drop-down list below the heading *Type* and select *Zone-based service*.

4) Click on the drop-down list to the right of *Charge Description* and select the appropriate option.

Note: If the appropriate charge description is not shown in the drop-down list, click on the **Details** button and add a new charge description.

5) Click **OK**.

6) The *Zone-based service* screen will appear.

7) The *Bill To* checkbox indicates the customer that will be billed for this service.

   If the current customer will be billed for the service, leave the check inside the checkbox.

   If another customer will be billed for the service, remove the check from the checkbox and enter the appropriate customer into the box provided.

8) The *Description* box displays the name of the service being added.

9) The *Invoice type* box displays the current invoice type for the service. To change the invoice type, click on the drop-down list and select the appropriate option. To learn more about invoice types, read **Chapter 8**.

10) The *Rate/Price* box indicates the amount you charge the customer each time you provide the service. Type the appropriate price into the box.

11) The *Qty* box is usually used if you are billing a rate per hour. In this case, enter the hourly rate into the *Rate/price* box and enter the number of hours into the *Qty.* box.

12) The *Approx.* box indicates the approximate date that you will provide the service. **This box does not affect the scheduling of the service at all.** The *Approx.* box is used to generate projection reports.

13) The *Status* box indicates the current status of the service.

14) The *Crew* box indicates the crew that is responsible for the service. Indicate the crew that will provide the service by clicking on the drop-down box and selecting the appropriate option.

15) The *Renewal* box indicates the how the service will be renewed. Enter the renewal type by clicking on the drop-down list and selecting the appropriate option.

    If the service is going to be renewed next year, select *Automatically*. In this case, the service will automatically be rescheduled for next year on the *Renewal Date*.

    If you are unsure if the service is going to be renewed next year, select *Prompt*. In this case, QXpress will ask you about the status of the service on the *Renewal Date*.

    If the service will not be renewed next year, select *Don't Renew*.

16) The *Renew on* box indicates either 1) the date that the service will be automatically renewed or 2) the date that the software will prompt you about the renewal status of the service. Enter the renewal date by clicking on the drop-down list and using the calendar provided.

17) The *Sales Rep.* box indicates the salesperson who sold the service. Enter the sales rep. by clicking on the drop-down list and selecting the appropriate option.

18) The *Prepaid* checkbox indicates whether or not the customer has already paid for the service.

    If the customer has already paid for the service, place a check inside the checkbox. In this case, the charge will be deducted from the customer's balance.

    If the customer has not already paid for the service, do not place a check inside the checkbox. In this case, the charge will be billed normally.

19) Click **OK** to save the information and return to the previous screen.

To fetch zone-based services into My Calendar:

1) In My Calendar, click **Schedule > Fetch Zone-based Services**.

2) The *Placing Zone-based Services onto My Calendar* screen will appear.

3) The *Add services to which day* box indicates the date that you want to schedule the services for. Enter the date by clicking on the drop-down list and using the calendar provided.

4) The *Which service do you want to add* box indicates the service that you want to schedule. Indicate the service by clicking on the drop-down list and selecting the appropriate option.

5) The *Restrict based on last job type date* box enables you to only schedule job sites that have not been serviced in a specific number of days.

If you do <u>not</u> want to schedule job sites that have been serviced recently, place a check inside the checkbox. Now enter the other information required to finish the sentence. For example, if you do <u>not</u> want to schedule job sites that have received a lawn application in the last 45 days since December 15, 2006, enter the information as shown below:

If you want to schedule all eligible job sites regardless of last job date, do <u>not</u> place a check inside the box.

6) The *Services were originally scheduled for crew #* box indicates the crew that you initially assigned to provide the service.

If the same crew will still provide the service, leave the check inside this checkbox.

If you want to assign the work to a different crew, remove the check from this checkbox and enter the appropriate crew into the box provided.

7) The *How do you want to add these services* box indicates whether you want to add the services by zone, zip code or by individual. Scheduling by zone or zip code means that you will pick different zones or zip codes and all of the customers that require the service in that zone or zip codes will be added to the route list. Scheduling by individual means that QXpress will provide you with a list of every customer that ordered the service and you will pick the individuals that you want to add to the route list.

If you want to schedule by zone, click on the drop-down list and select *Batch - By Zone.* A new box will appear. Click on the drop-down list and select the zone that you want to add to the route list. Click **Add**. Continue to add as many zones as you require.

If you want to schedule by individual, click on the drop-down list and select *Individually - Pick from List*. Click **Go**. The *Route Applications - Pick Jobs from List* screen will appear.

Select the customers that you want to add to the route list by placing a check inside the checkbox beside their name. Click **Send selected jobs to My Calendar**. Click **Close**.

8) Click **OK** to return to My Calendar. The zone-based services will now be shown in My Calendar.

To edit a zone-based service:

1) In the *Customer* screen, highlight the zone-based service that you want to edit.
2) Click **Schedule > Edit Service or Billing Installment**.
3) The *Zone-based service* screen will appear.
4) Edit the information as required.
5) Click **OK** to save the information and return to the previous screen.

To delete a zone-based service:

1) In the *Customer* screen, highlight the zone-based service that you want to delete.
2) Click **Schedule > Edit Service or Billing Installment**.
3) The *Zone-based service* screen will appear.
4) Click on the *General* tab.
5) Click **Activities > Delete**.
6) Answer **Yes** to the prompt.
7) Click **OK** to save the information and return to the previous screen.

5.4 Scheduling an appointment/one-time service

Appointment-based scheduling is used to schedule one-time services that will be provided on a specific date in the future.

To schedule a new appointment/one-time service:

1) In the *Customer* screen, click **Schedule > New Service or Billing Installment**.

2) The *New Schedule* screen will appear.

3) Click on the drop-down list below the heading *Type* and select *One time/ appointment*.

4) Click on the drop-down list to the right of *Charge Description* and select the appropriate option.

Note: If the appropriate charge description is not shown in the drop-down list, click on the **Details** button and add a new charge description.

5) Click **OK**.

6) The *One time service* screen will appear.

7) The *Bill To* checkbox indicates the customer that will be billed for this service.

   If the current customer will be billed for the service, leave the check inside the checkbox.

   If another customer will be billed for the service, remove the check from the checkbox and enter the appropriate customer into the box provided.

8) The *Description* box displays the name of the service being added.

9) The *Invoice type* box displays the current invoice type for the service. To change the invoice type, click on the drop-down list and select the appropriate option. To learn more about invoice types, read **Chapter 8**.

10) The *Rate/Price* box indicates the amount you charge the customer for the service. Type the appropriate price into the box.

11) The *Qty* box is usually used if you are billing a rate per hour. In this case, enter the hourly rate into the *Rate/price* box and enter the number of hours into the *Qty.* box.

12) The *Status* box indicates the current status of the service.

13) The *Crew* box indicates the crew that is responsible for the service. Indicate the crew that will provide the service by clicking on the drop-down box and selecting the appropriate option.

14) The *Sales Rep.* box indicates the salesperson who sold the service. Enter the sales rep. by clicking on the drop-down list and selecting the appropriate option.

15) The *Prepaid* checkbox indicates whether or not the customer has already paid for the service.

If the customer has already paid for the service, place a check inside the checkbox. In this case, the charge will be deducted from the customer's prepaid balance.

If the customer has <u>not</u> already paid for the service, do <u>not</u> place a check inside the checkbox. In this case, the charge will be billed normally.

16) The *Under Contract* checkbox indicates whether or not this service is included as part of an existing billing installment.

If the service is included as part of an existing billing installment, place a check inside the checkbox. In this case, the service will appear as a zero amount on the customer's invoice or it will not be included on the invoice at all.

If the service is <u>not</u> included as part of an existing billing installment, do <u>not</u> place a check inside the checkbox. In this case, the service will be invoiced normally.

17) The *Date* box indicates the date that the service will be provided. Enter the date by clicking on the drop-down list and using the calendar provided.

18) The *Prompt for rescheduling when done* checkbox indicates whether or not you want QXpress to ask you if you want to schedule a new appointment once this one is completed.

If you want QXpress to prompt you to schedule a new appointment once this one is completed, place a check inside the checkbox.

If you do <u>not</u> want QXpress to prompt you to schedule a new appointment once this one is completed, do <u>not</u> place a check inside the checkbox.

19) The *Start/Until* boxes are used if the service is being scheduled for a specific time period. In this case, type the start/until times into the appropriate box. For example, if the service is going to start at 9a.m. type *9am* into the *Start* box.

20) The *Window* box indicates to the variation that is acceptable between the entered *Start* time and the time that the crew actually arrives at the job site. The number entered into the *Window* box will appear on the crew's route list.

21) The *Instructions for Crew* box provides space for you to type notes about the service to your crew. All notes entered into this box will appear on the crew's route list.

22) The *Long description for invoice* box provides space for you to enter a detailed explanation about the appointment that will appear on the customer's invoice. All notes entered into this box will appear on the customer's invoice.

23) Click **OK** to save the information and return to the previous screen.

To assign a one-time service / appointment to multiple crews (QXpress Platinum and QXpress Enterprise only):

1) In My Calendar, locate the one-time service that you want to assign to multiple crews.

2) Right-click on the service and select *Convert to project*.

3) Right-click on the service again and select *Copy visit to crew*.

4) Enter the name of the crew into the box provided.

5) Click **OK**.

To edit a one-time / appointment service:

1) In the *Customer* screen, highlight the one-time service / appointment that you want to edit.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *One time service* screen will appear.

4) Edit the information as required.

5) Click **OK** to save the information and return to the previous screen.

To delete a one-time / appointment service:

1) In the *Customer* screen, highlight the one-time service / appointment that you want to delete.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *One time service* screen will appear.

4) Click on the *General* tab.

5) Click **Activities > Delete**.

6) Answer **Yes** to the prompt.

7) Click **OK** to save the information and return to the previous screen.

5.5 Scheduling a project

Project scheduling is used to schedule multi-day services that involve various crews, services and material load lists. The steps involved in scheduling a project are outlined below.

To add a new project to a customer's account:

1) In the *Customer* screen, click **Schedule > New Service or Billing Installment**.

2) The *New Schedule* screen will appear.

3) Click on the drop-down list below the heading *Type* and select *Project*.

4) Click on the drop-down list to the right of *Charge Description* and select the appropriate option.

Note: If the appropriate charge description is not shown in the drop-down list, click on the **Details** button and add a new charge description.

5) Click **OK**.

6) The *Multi-day project* screen will appear.

7) The *Bill To* checkbox indicates the customer that will be billed for this service.

   If the current customer will be billed for the service, leave the check inside the checkbox.

   If another customer will be billed for the service, remove the check from the checkbox and enter the appropriate customer into the box provided.

8) The *Description* box displays the name of the service being added.

9) The *Invoice type* box displays the current invoice type for the service. To change the invoice type, click on the drop-down list and select the appropriate option. To learn more about invoice types, read **Chapter 8**.

10) The *Rate/Price* box indicates the amount you charge the customer for the service. Type the appropriate price into the box.

11) The *Qty* box is usually used if you are billing a rate per hour. In this case, enter the hourly rate into the *Rate/price* box and enter the number of hours into the *Qty.* box.

12) The *Status* box indicates the current status of the service.

13) The *Crew* box indicates the crew that is responsible for the service. Indicate the crew that will provide the service by clicking on the drop-down box and selecting the appropriate option.

14) The *Sales Rep.* box indicates the salesperson who sold the service. Enter the sales rep. by clicking on the drop-down list and selecting the appropriate option.

15) The *Prepaid* checkbox indicates whether or not the customer has already paid for the service.

    If the customer has already paid for the service, place a check inside the checkbox. In this case, the charge will be deducted from the customer's prepaid balance.

    If the customer has <u>not</u> already paid for the service, do <u>not</u> place a check inside the checkbox. In this case, the charge will be billed normally.

16) The *Under Contract* checkbox indicates whether or not this service is included as part of an existing billing installment.

    If the service is included as part of an existing billing installment, place a check inside the checkbox. In this case, the service will appear as a zero amount on the customer's invoice or it will not be included on the invoice at all.

    If the service is <u>not</u> included as part of an existing billing installment, do <u>not</u> place a check inside the checkbox. In this case, the service will be invoiced normally.

17) The *Date* box indicates the date that the project will begin. Enter the appropriate date by clicking on the drop-down list and using the calendar provided.

18) The *Instructions for Crew* box provides space for you to type notes about the service to your crew. All notes entered into this box will appear on the crew's route list.

19) The *Long description for invoice* box provides space for you to enter a detailed explanation about the service that will appear on the customer's

invoice. All notes entered into this box will appear on the customer's invoice.

20) Click **OK** to save the information and return to the previous screen.

To add services to the project:

1) In the *Multi-day project* screen, click on the *Job Items* tab.

2) Click **Add**.

3) A new row will appear.

4) The *Description* column indicates the name of the service that you are adding. Click on the drop-down list and select the appropriate option.

5) The *Sort Order* column indicates the order that the items will be listed in this screen and on the invoice (if the charge will be included on the invoice). For example, a job item with sort order 1 will appear ahead of a job item with sort order 2. Type the appropriate numbers into the column.

6) The *Est. Qty./Hours* column indicates how long you estimate the service will take to complete. Type the estimated time into the column. For example, if you estimate that the service will take you one and one-half hours, type *1.5* into the box.

7) The *Charge Rate* column indicates how much you are charging the customer for this service. Type the appropriate amount into the column.

8) The *Charge Qty.* column is used if you are billing for materials, or by the hour. In this case, enter the unit cost for the material, or the hourly rate, into the *Rate/price* box and enter the number of units of material sold, or the total number of hours, into the *Qty.* box.

9) The *Charge Type* column indicates how you are going to charge for the job.

If you are charging the customer a flat rate for the service, click on the drop-down list and select *FL*. In this case, the charge will be equal to the entry in the *Charge Rate* column.

If you are charging the customer by the hour, or by the quantity of material used, click on the drop-down list and select *QY*. In this case, the charge will equal the entry in the *Charge Rate* column multiplied by the entry in the *Charge Qty.* column.

If you are <u>not</u> charging for the service, click on the drop-down list and select *NC*.

10) Click **OK** to save the information and return to the previous screen.

To schedule each of the services added to a project:

1) In the *Multi-day project* screen, click on the *Project Scheduling* tab.

2) Each of the services that you have added to the project in the *Job Items* folder will be listed at the bottom of the screen.

3) Highlight the service that you want to schedule.

4) Using the calendar provided, select the date that you want to schedule the service for.

5) Click **Activities > Add Visit**.

6) The *Project Visit Entry* screen will appear.

7) The *Crew* box indicates the crew that will provide the service. Click on the drop-down list and select the appropriate option.

8) The *Date* box indicates the date that you are scheduling the service for. If you want to change the date, click on the drop-down list and use the calendar provided.

9) The *Start/Until Time* boxes indicate when the crew will start the service and when the crew will stop the service. Type the appropriate times into the boxes. For example, if the crew will start the job at 9:15 in the morning, type *9:15am* into the *Start* box.

10) The *Status* box indicates the current status of the service.

11) The *Instructions for Crew* box provides space for you to type notes about the service to your crew. All notes entered into this box will appear on the crew's route list.

12) The *Material Load List* indicates the material the crew will require to complete the service. To add a material to this list, click **Add**. A new row will appear. Select the appropriate material and enter the appropriate quantity.

Note: Only materials that have been entered into the *Job Items* folder will be shown in the material load list.

13) Click **OK** to save the information and return to the previous screen.

To edit the schedule information for a service in a project:

1) In the *Multi-day project* screen, click on the *Project Scheduling* tab.

2) Click on the service that you want to edit.

3) Click **Activities > Edit Visit**.

4) The *Project Visit Entry* screen will appear.

5) Edit the information as required.

6) Click **OK** to save the information and return to the previous screen.

To remove a service from a project:

1) In the *Multi-day project* screen, click on the *Job Items* tab.

2) Highlight the service that you want to remove.

3) Answer **Yes** to the prompt.

4) Click **OK** to save the information and return to the previous screen.

To edit a project:

1) In the *Customer* screen, highlight the project that you want to edit.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *Multi-day project* screen will appear.

4) Edit the information as required.

5) Click **OK** to save the information and return to the previous screen.

To delete a project:

1) In the *Customer* screen, highlight the project that you want to delete.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *Multi-day project* screen will appear.

4) Click on the *General* tab.

5) Click **Activities > Delete**.

6) Answer **Yes** to the prompt.

7) Click **OK** to save the information and return to the previous screen.

To use the Reschedule dates later/earlier feature:

1) Edit an existing Project.

2) Under the *Project Scheduling* tab, select the date you want to reschedule from. Dates prior to this date will not be rescheduled. Dates after and including this date will be rescheduled.

3) Click **Activities > Reschedule dates later/earlier...**.

4) Select which days of the week the rescheduling can use. By default, weekdays will always be selected, and weekends will always be un-selected.

5) Select whether you want to move dates “Later” (done at a *later* date), or “Earlier” (done at an *earlier* date).

6) Enter the number of days to push later/earlier.

7) Click **OK**.

8) Take note of any conflict warnings QXpress finds. You will have to manually deal with these conflicts when the process completes.

5.6 Scheduling job packages

Setting up job packages is explained in detail in **section 1.2.5**. Read this section for an introduction to job packages.

Once you have set-up your job packages, you can schedule them for any customer. Doing so, will add all of the services in the job package to that customer’s account.

To ensure Job Package scheduling is turned on:

1) Click **Edit > Preferences**.

2) Click on the *Routing & Scheduling* tab.

3) Ensure there is a check in the *Show Job Packages as a scheduling option* checkbox.

4) Click **OK**. You may need to close and reopen QXpress for changes to take full effect.

To add a job package to a customer's account:

1) In the *Customer* screen, click **Schedule > Add Job or Billing Installment**.

2) The *New Schedule* screen will appear.

3) Click on the drop-down list below the heading *Type* and select *Job package*.

Note: The *Prompt to add same entries to all items of the package* checkbox indicates whether or not you want the same entries to be made for each service in the job package.

If you want the same entries to be made for each of the items in the job package, place a check inside the checkbox. For example, if you want the price of each item in the job package to be the same, place a check inside the checkbox. Then, when you click **OK** in step 5, the *Adding entries to all items in a package* screen will appear.

For each of the entries that you want to be the same for all items, place a check in the appropriate check box and enter the appropriate value into the space provided.

If you do <u>not</u> want the same entries to be made for each of the items in the job package, do <u>not</u> place a check inside the checkbox.

4) Click on the drop-down list to the right of *Charge Description* and select the appropriate option.

5) Click **OK**.

5.7 Using custom fields for services

Custom Fields enable you to track information about a service that is specific to your company. Custom fields are typically used to track additional data such as "Date Entered", "Data Promised" and "Priority".

You can add up to 15 Custom Fields - 3 date fields, 4 drop-down list fields, 4 numeric fields and 4 character fields.

To add a custom field to a service:

1) In the customer account, double-click on the service.

2) Click the *Edit Custom Fields...* tab:

3) Place a check inside the *Show?* checkbox beside the field you want to show.

4) Type the name of field into the *Field Name* column.

5) Click **OK**.

To add items to a drop-down list custom field:

1) In the customer account, double-click on the service.

2) Click the *Edit Custom Fields...* tab.

3) Click on the drop-down list field that you want to add an item to.

4) Click **Add Item**.

5) Type the name of the item into the box provided.

6) If you want to associate an icon with this item, click on the **Details** button in the *Icon* column.

7) Click on the appropriate icon.

8) Click **OK**.

To delete items from a drop-down list custom field:

1) In the customer account, double-click on the service.

2) Click the *Edit Custom Fields...* tab.

3) Click on the drop-down list field that you want to delete an item from.

4) Click on the item you want to delete

5) Click **Delete Item**.

6) Click **OK**.

To enter information into custom fields that you have added:

1) In the customer account, double-click on the service.

2) Click the *Custom Fields* tab.

3) Enter information into the appropriate custom fields.

4) Click **OK**.

To remove a custom field from a service:

1) In the customer account, double-click on the service.

2) Click the *Edit Custom Fields...* tab.

3) Remove the check from *Show?* checkbox beside the field you want to remove.

4) Click **OK**.

5.8 Importing a QuickBooks Estimate

To import an Estimate from QuickBooks:

1) Schedule a new service, or open an existing service.

2) Click on the *Job Items* tab.

3) Click **Activities > Import QuickBooks Estimate...**.

4) Assuming QuickBooks is open on this computer, a list of estimates for this customer will now appear.

5) If you are using QuickBooks Pro 2004 or higher, you can click on an estimate and then click **Go To...** to open the estimate in QuickBooks.

6) In QXpress, click on the estimate you want to import from QuickBooks, and click **Import Estimate**. All the items from the QuickBooks estimate will appear.

Note: Item descriptions from the estimate will not be brought over.

Note: Items that are calculated as a percentage on the QuickBooks estimate will be brought to QXpress as a whole number.

Note: If there are multiple Charge Descriptions for an item in QXpress, QXpress will first look to see if the QuickBooks Class used in the estimate is set to any of these Charge Descriptions in QXpress, if it is, it will use that Charge Description, otherwise it will use the first Charge Description for that item it can find.

5.9 Conflict checking

Conflict checking gives you the ability to check each scheduled service to see if it conflicts with any future appointments

To turn the Conflict Checking feature on:

1) Go to **Edit > Preferences**.

2) Click on the *Routing & Scheduling* tab.

3) Put a check in the "Show Scheduling Conflicts button in the Service screen?" checkbox.

4) Click **OK**.

To use the Conflict Checking feature:

1) Schedule a new service, or open an existing one.

2) Ensure that your service has a *Start Time* and *Until Time* filled out.

3) From the *Service* screen, click on the "Check For Conflicts" button, which can be found between the Quick Invoice button and the OK button.

Note: Appointments will not be considered conflicts if they are for the same customer.

5.10 Appointment Colors

QXpress gives you the ability to color-code appointments in the Day View and Week View calendars.

To use this feature:

1) Schedule a new service, or open an existing one.

2) Click on the *General* tab.

3) In the top right, change the "Appt. Color" dropdown list to the desired color.

4) Click **OK**.

5) Find the service in *My Calendar* under either the *Day View* or *Week View*.

Note: There is no way to change the label of the color. It is currently just the color's name.

Note: Appointment colors are not available for List View or Month View.

Note: There is no way to automatically set a default appointment color per crew.

Note: "Selected" appointments will always be assigned a blue color, regardless of what the appointment color is.

To set default appointment colors per Charge Description:

1) Click **Lists > Charge Description List**.

2) Click on an existing Charge Description.

3) Click **Advanced**.

4) Click on the *Advanced* tab.

5) Make a selection from the "Default appt. color:" dropdown list.

6) Click **OK**.

Note: This will not affect existing appointments.

CHAPTER 6
JOB COSTING

This chapter explains how to job cost using QXpress. Job costing enables you to allocate labor, material and subcontractor costs to specific services so that you can determine how profitable those services are. Job costing helps you better understand your costs and make more profitable decisions.

The topics discussed in this chapter include:

6.1 Entering budgeted costs for a service

Budgeted costs are the costs that you think your company will incur by providing a service. By entering the your budgeted costs into QXpress, you will be able to determine if the service will or will not be profitable before you provide the service. As well, you can compare your budgeted costs to your actual costs to identify significant discrepancies.

The steps required to enter budgeted costs for a service are outlined below.

6.1.1 Budgeted labor costs

Labor costs are determined by multiplying the number of hours your employees spend providing a service by their job cost rates (i.e. how much you pay them per hour). Therefore, in order to determine your budgeted labor costs for a service, you must enter how long you think it will take to complete the service.

The steps required to enter budgeted labor costs are outlined below.

To enter a budgeted labor cost:

1) In the *Customers* screen, highlight the service that you want to enter a budgeted labor cost for.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

4) Click on the *Job Items* tab.

5) Enter the budgeted labor <u>man hours</u> into the *Est. Qty/Hours* column.

Note: The total budgeted labor cost is calculated by multiplying the budgeted labor hours by the average job cost rate of the crew providing the service. To view your total budgeted labor cost, click the **Print Estimate/Report** button at the bottom of the screen. Select the *Job-Item-Summary* template. Click **OK**.

6) Click **OK** to save the information and return to the previous screen.

To add a new budgeted labor cost:

1) In the *Customers* screen, highlight the service that you want to add a budgeted labor cost for.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

4) Click on the *Job Items* tab.

5) Click **Add**.

6) A new row will appear.

7) Enter the appropriate description into the *Description* column.

8) Enter the budgeted labor <u>man hours</u> into the *Est. Qty/Hours* column.

Note: The total budgeted labor cost is calculated by multiplying the budgeted labor hours by the average job cost rate of the crew providing the service. To view your total budgeted labor cost (QXpress Platinum and QXpress Enterprise only), click the **Print Estimate/Report** button at the bottom of the screen. Select the *Job-Item-Summary* template. Click **OK**.

9) Click **OK** to save the information and return to the previous screen.

To edit a budgeted labor cost:

1) In the *Customers* screen, highlight the service that you want to edit a budgeted labor cost for.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

4) Click on the *Job Items* tab.

5) Edit the budgeted labor cost information as required.

6) Click **OK** to save the information and return to the previous screen.

To remove a budgeted labor cost:

1) In the *Customers* screen, highlight the service that you want to remove a budgeted labor cost from.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

4) Click on the *Job Items* tab.

5) Highlight the budgeted labor cost that you want to remove.

6) Click **Remove**.

7) Answer **Yes** to the prompt.

8) Click **OK** to save the information and return to the previous screen.

6.1.2 Budgeted material costs

Material costs are determined by multiplying the number of units you think you will use by the cost per unit. Therefore, in order to determine your budgeted material costs for a service, you must enter the type, amount and cost of material that you think you are going to use while providing the service.

The steps required to enter budgeted material costs are outlined below.

To add a new budgeted material cost:

1) In the *Customers* screen, highlight the service that you want to add a budgeted material cost for.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

4) Click on the *Job Items* tab.

5) Click **Add**.

6) A new row will appear.

7) Enter the appropriate description into the *Description* column. The charge description must be assigned to a QuickBooks item that is of type ‘Inventory Part’ or ‘Non-Inventory Part’.

8) Enter the budgeted material quantity into the *Est. Qty/Hours* column.

Note: The total budgeted material cost is calculated by multiplying the budgeted material quantity by the cost of the material that you have previously entered for the associated Item in QuickBooks. To view your total budgeted material cost, click the **Print Estimate/Report** button at the bottom of the screen. Select the *Job-Item-Summary* template. Click **OK**.

9) Click **OK** to save the information and return to the previous screen.

To edit a budgeted material cost:

1) In the *Customers* screen, highlight the service that you want to edit a budgeted material cost for.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

4) Click on the *Job Items* tab.

5) Edit the budgeted material cost information as required.

6) Click **OK** to save the information and return to the previous screen.

To remove a budgeted material cost:

1) In the *Customers* screen, highlight the service that you want to remove a budgeted material cost from.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

4) Click on the *Job Items* tab.

5) Highlight the budgeted material cost that you want to remove.

6) Click **Remove**.

7) Answer **Yes** to the prompt.

8) Click **OK** to save the information and return to the previous screen.

6.1.3 Budgeted subcontractor costs

(QXpress Platinum and QXpress Enterprise only)

Subcontractor costs are those costs that are paid to other companies for helping you provide a service. In order to track subcontractor costs, you must enter the name of the subcontractor and the amount you owe them.

The steps required to enter budgeted subcontractor costs are outlined below.

To add a new budgeted subcontractor cost:

1) In the *Customers* screen, highlight the service that you want to add a budgeted subcontractor cost for.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

4) Click on the *Subcontractors* tab.

5) Click **Add**.

6) A new row will appear.

7) The *Description* column indicates the name of the subcontractor cost that you are adding. Enter the description by clicking on the drop-down list and selecting the appropriate option.

8) The *Vendor* column indicates the vendor that you will owe a payment to. Enter the vendor by clicking on the drop-down list and selecting the appropriate option.

9) The *Qty.* column is used if you are paying the subcontractor by hour or by unit. In this case, type the budgeted number of hours into this column.

10) The *Cost* column indicates either i) the cost per hour or ii) the flat rate that you are paying the subcontractor. Enter the appropriate cost into the column.

11) The *Ref. No.* column indicates the reference number that will appear on the vendor bill in QuickBooks. Enter the vendor number by typing the appropriate information into the column.

12) The *Memo* column provides space for you to enter notes about the cost. Type the appropriate notes into the column.

Note: The total budgeted subcontractor cost is calculated by multiplying the *Qty.* column by the *Cost* column. To view your total budgeted labor cost, click the **Print Estimate/ Report** button at the bottom of the screen. Select the *Job-Item-Summary* template. Click **OK**.

13) Click **OK** to save the information and return to the previous screen.

To edit a budgeted subcontractor cost:

1) In the *Customers* screen, highlight the service that you want to edit a budgeted subcontractor cost for.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

4) Click on the *Subcontractor* tab.

5) Edit the budgeted subcontractor cost information as required.

6) Click **OK** to save the information and return to the previous screen.

To remove a budgeted subcontractor cost:

1) In the *Customers* screen, highlight the service that you want to remove a budgeted subcontractor cost from.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

4) Click on the *Subcontractor* tab.

5) Highlight the budgeted subcontractor cost that you want to remove.

6) Click **Remove**.

7) Answer **Yes** to the prompt.

8) Click **OK** to save the information and return to the previous screen.

6.2 Printing an estimate

Once you have entered all of your budgeted costs for a service (see **section 6.1**) you can continue on and print out an estimate for that service.

The steps required to print an estimate are outlined below.

To print an estimate for a service:

1) Enter all of your budgeted costs as discussed in **section 6.1**.

2) In the *Customers* screen, highlight the service that you want to print an estimate for.

3) Click **Schedule > Edit Service or Billing Installment**.

4) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

5) Click on the *Job Items* tab.

6) Click **Print Estimate/Report**.

7) The *Printing Estimate/Report* screen will appear.

8) Click on the drop-down list and select the estimate template that you want to use.

9) Click **OK**.

6.3 Entering actual costs for a service

Actual costs are the costs that you incurred by providing a service. By entering the your actual costs into QXpress, you are able to determine if the service was profitable or not. As well, you can compare your budgeted costs to your actual costs to identify significant discrepancies.

The steps required to enter budgeted costs for a job are outlined below.

6.3.1 Actual labor costs

Labor costs are determined by multiplying the number of hours your employees spent providing the service by their job cost rates (i.e. how much you pay them per hour). Therefore, in order to determine your actual labor costs for a service, you must enter how long it took your employees to provide the service. This is done after the service has been provided.

The steps required to enter actual labor costs are outlined below.

To enter actual labor costs from the customer screen:

1) In the *Customers* screen, highlight the service that you want to enter actual labor costs for.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

4) Click on the *Act. Service Times* tab.

5) Each service in the job items tab will be shown.

6) The *Description* column indicates the name of the service.

7) The *Start Time* column indicates the time that the employee(s) started providing the service. Type the appropriate start time into the column. For example, if the employee(s) started at 9:15 in the morning, type *9:15am* into the column.

8) The *Stop Time* column indicates the time that the employee(s) stopped providing the service. Type the appropriate stop time into the column. For example, if the employee(s) stopped at 10:15 in the morning, type *10:15am* into the column.

9) The *Hours* column displays the total length of time the employee(s) spent providing the service.

10) The *Employee* column indicates the employee(s) that provided the service. Enter the employee(s) by clicking on the drop-down list and selecting the appropriate option.

Note: If you want to make the same entry for all of the employees in a crew, select *CREW* from the drop-down list. Doing so, saves you from having to make multiple entries for each member of the crew.

11) The *Job Cost Rate Per Hour* displays the cost of the employee per hour. To learn about entering job cost rates read **section 3.1**.

12) Click **OK** to save the information and return to the previous screen.

To enter actual labor costs from My Calendar:

1) In My Calendar, double-click on the job that you want to enter actual labor costs for.

Note: You can only enter actual labor costs for services with a *On Route* status or *Done*. You can tell if it is *On Route* or *Done* by hovering your cursor over the *Sts* column. If the service has a status of *Pending*, highlight the service and click **Schedule > Status to 'On Route'**.

2) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

3) Click on the *Act. Service Times* tab:

4) Each service in the job items tab will be shown.

5) The *Description* column indicates the name of the service.

6) The *Start Time* column indicates the time that the employee(s) started providing the service. Type the appropriate start time into the column. For example, if the employee(s) started at 9:15 in the morning, type *9:15am* into the column.

7) The *Stop Time* column indicates the time that the employee(s) stopped providing the service. Type the appropriate stop time into the column. For example, if the employee(s) stopped at 10:15 in the morning, type *10:15am* into the column.

8) The *Hours* column displays the total length of time the employee(s) spent providing the service.

9) The *Employee* column indicates the employee(s) that provided the service. Enter the employee(s) by clicking on the drop-down list and selecting the appropriate option.

Note: If you want to make the same entry for all of the employees in a crew, select *CREW* from the drop-down list. Doing so, saves you from having to make multiple entries for each member of the crew.

10) The *Job Cost Rate Per Hour* displays the cost of the employee per hour. To learn about entering job cost rates read **section 3.1**.

11) Click **OK** to save the information and return to the previous screen.

To enter actual labor costs from the Job Cost Timesheet:

1) In My Calendar, click **Activities > Job Cost Timesheet**.

2) The *Job Cost Timesheet* screen will appear.

3) Each job that is both *On Route* or *Done* and shown in My Calendar is displayed on this screen.

4) The *Description* column indicates the name of the service.

5) The *Start Time* column indicates the time that the employee(s) started providing the service. Type the appropriate start time into the column. For example, if the employee(s) started at 9:15 in the morning, type *9:15am* into the column.

6) The *Stop Time* column indicates the time that the employee(s) stopped providing the service. Type the appropriate stop time into the column. For example, if the employee(s) stopped at 10:15 in the morning, type *10:15am* into the column.

7) The *Hours* column displays the total length of time the employee(s) spent providing the service.

8) The *Employee* column indicates the employee(s) that provided the service. Enter the employee(s) by clicking on the drop-down list and selecting the appropriate option.

Note: If you want to make the same entry for all of the employees in a crew, select *CREW* from the drop-down list. Doing so, saves you from having to make multiple entries for each member of the crew.

9) The *Job Cost Rate Per Hour* displays the cost of the employee per hour. To learn about entering job cost rates read **section 3.1**.

10) Click **Close** to save the information and return to the previous screen.

To enter group service times:

Note: Use group service times when you record the start and stop time for several job sites at once, and wish to spread the actual time over all job sites.

1) In My Calendar, click **Activities > Job Cost Timesheet**.

2) The *Job Cost Timesheet* screen will appear.

3) Highlight the services that you want to assign group service times to. To highlight these, hold down the **Ctrl** key on your keyboard and click on the left margin of each job you want to highlight.

4) Click **Activities > Distribute times to selected services...**

5) Enter the start time of the first service and the stop time of the last service into the box provided.

6) Click **OK**.

7) The total time will be assigned to each service in the same proportion as the individual estimated time for each service to the total estimated time of all the services.

6.3.2 Actual material costs

Material costs are determined by multiplying the number of units you used while providing a service by the cost per unit. Therefore, in order to determine your actual material costs for a service, you must enter the type, amount and cost of material that you used while providing the service.

The steps required to enter actual material costs are outlined below.

To enter actual material costs from the customer screen:

1) In the *Customers* screen, highlight the job that you want to enter actual material costs for.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

4) Click on the *Act. Mat. Usage* tab.

5) Each material listed in the job items tab will be shown.

6) The *Description* column indicates the name of the material.

7) The *Employee* column indicates the employee that used the material. Enter the employee by clicking on the drop-down list and selecting the appropriate option.

8) The *Date Used* column indicates the date that the material was used on. Type the appropriate date into the column. For example, if you want to enter the date as June 1, 2007, type *6/1/07* into the column.

9) The *Units Used* column indicates the number of units of the material that was used. Type the appropriate number into the column.

10) The *Cost Per Unit* column indicates how much each unit of material cost you to purchase. Type the appropriate number into the column.

11) Click **OK** to save the information and return to the previous screen.

To enter actual material costs from My Calendar:

1) In My Calendar, double-click on the service that you want to enter actual material costs for.

Note: You can only enter actual material costs for services with a *On Route* or *Done* status. You can tell if it is *On Route* or *Done* by hovering your cursor over the *Sts* column. If the service has a status of *Pending*, highlight the service and click **Schedule > Status to 'On Route'**.

2) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

3) Click on the *Act. Mat. Usage* tab:

4) Each material listed in the job items tab will be shown.

5) The *Description* column indicates the name of the material.

6) The *Employee* column indicates the employee that used the material. Enter the employee by clicking on the drop-down list and selecting the appropriate option.

7) The *Date Used* column indicates the date that the material was used on. Type the appropriate date into the column. For example, if you want to enter the date as June 1, 2007, type *6/1/07* into the column.

8) The *Units Used* column indicates the number of units of the material that were used. Type the appropriate number into the column.

9) The *Cost Per Unit* column indicates how much each unit of material cost you to purchase. Type the appropriate number into the column.

10) Click **OK** to save the information and return to the previous screen.

6.3.3 Vendor Bills & Purchase Orders

Versions: Gold, Platinum, Enterprise

If your company purchases materials in the field at the time of service, you can create Vendor Bills or Purchase Orders for materials directly from the *Act. Mat. Usage* tab in QXpress. The Vendor Bill or Purchase Order gets posted into QuickBooks instantly, and the resulting materials get entered into the *Act. Mat. Usage* tab and *Job Items* tab - saving you from unnecessary double-entry.

To enter a Vendor Bill or Purchase Order:

1) Edit the occurrence of any service (i.e. do not edit the series of a recurring service).

2) Click on the *Act. Mat. Usage* tab.

3) Click **Create Bill / P.O. for materials purchased in the field**.

4) Select whether you want to create a Vendor Bill (i.e. you have already received the bill from the Vendor), or a Purchase Order (i.e. the Vendor will send you a bill at a later date and the bill will match a Purchase Order Number you provide).

5) Go through each of the fields and make the appropriate selection, if applicable.

Note: In the case of a Purchase Order, the Purchase Order Number will be assigned automatically once you post the Purchase Order to QuickBooks, as QuickBooks will provide you with the next sequential Purchase Order Number.

6) In the grid below, list all the Charge Descriptions for the items you are purchasing. Only Inventory and Non-Inventory Parts will be listed.

7) Click **Post Vendor Bill | Purchase Order to QuickBooks**.

8) You will return to the *Act. Mat. Usage* tab with the quantities purchased entered automatically.

6.3.4 Actual subcontractor costs

Subcontractor costs are those costs that are paid to other companies (vendors) for helping you provide a service. In order to track subcontractor costs, you must enter the name of the subcontractor and the amount you owe them.

The steps required to enter actual subcontractor costs are outlined below.

To enter actual subcontractor costs from the customer screen:

1) In the *Customers* screen, highlight the job that you want to enter actual subcontractor costs for.

2) Click **Schedule > Edit Service or Billing Installment**.

3) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

4) Click on the *Subcontractors* tab.

5) Each budgeted subcontractor cost will be shown.

6) The *Description* column indicates the name of the subcontractor cost.

7) The *Vendor* column indicates the vendor that you owe payment to. Enter the vendor by clicking on the drop-down list and selecting the appropriate option.

8) The *Qty.* column is used if you are paying the subcontractor by hour or by the unit. In this case, type the number of hours owed into this column.

9) The *Cost* column indicates either i) the cost per hour or ii) the flat rate that you are paying the subcontractor. Enter the appropriate cost into the column.

10) The *Ref. No.* column indicates the reference number that will appear on the vendor bill in QuickBooks. Enter the vendor number by typing the appropriate information into the column.

11) The *Memo* column provides space for you to enter notes about the cost. Type the appropriate notes into the column.

12) Click **OK** to save the information and return to the previous screen.

To enter actual subcontractor costs from My Calendar:

1) In My Calendar, double-click on the job that you want to enter actual subcontractor costs for.

Note: You can only enter actual subcontractor costs for services with a *On Route* or *Done* status. You can tell if it is *On Route* or *Done* by hovering your cursor over the *Sts* column. If the service has a status of *Pending*, highlight the service and click **Schedule > Status to 'On Route'**.

2) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

3) Click on the *Subcontractor* tab:

4) Each budgeted subcontractor cost will be shown.

5) The *Description* column indicates the name of the subcontractor cost.

6) The *Vendor* column indicates the vendor that you owe a payment to. Enter the vendor by clicking on the drop-down list and selecting the appropriate option.

7) The *Qty.* column is used if you are paying the subcontractor by hour. In this case, type the number of hours owed into this column.

8) The *Cost* column indicates either i) the cost per hour or ii) the flat rate that you are paying the subcontractor. Enter the appropriate cost into the column.

9) The *Ref. No.* column indicates the reference number that will appear on the vendor bill in QuickBooks. Enter the vendor number by typing the appropriate information into the column.

10) The *Memo* column provides space for you to enter notes about the cost. Type the appropriate notes into the column.

11) Click **OK** to save the information and return to the previous screen.

6.4 Posting service times to QuickBooks

After you have entered the start and stop times for completed services into QXpress, you can export that service time information into QuickBooks. The service time information will be automatically entered into the appropriate employees' weekly timesheet.

To export service times to QuickBooks:

1) Click **Post to QuickBooks > Service Times**.

2) The *Post Service Times to QuickBooks* screen will appear.

3) All service time entries that are ready to be exported will be displayed.

4) Click **Post to QB**.

5) A prompt will appear once the export has been successful.

6) Click **OK**.

7) Click **Close** to return to the previous screen.

Note: Service times that are not listed under the *Not 'Ready' to send to QB* tab are there because their status is *On Route*. If you want to export these service times to QuickBooks, click on the *Not 'Ready' to send to QB tab* and place a check inside the *Include services 'On Route'* checkbox.

6.5 Posting subcontractor / vendor Bills to QuickBooks

(QXpress Platinum and QXpress Enterprise only)

To send Vendor Bills to QuickBooks:

1) Click **Post to QuickBooks > Vendor Bills**. All completed subcontractor services that are ready to be posted as Vendor bills to QuickBooks will be listed here.

2) After you have selected the Vendor Bills to post, click **Post to QB**.

3) A prompt will appear once the export has been successful.

4) Click **OK**.

5) Click **Close** to return to the previous screen.

6.6 Posting Inventory Adjustments to QuickBooks

When posting invoices to QuickBooks, QXpress posts over what was listed on the Invoice, rather than what was actually used. 'Inventory Adjustments' look at the difference between what is posted in the Invoice and what was actually used, and passes an Inventory Adjustment to QuickBooks to account for this.

To send Inventory Adjustments to QuickBooks:

1) Edit an existing service, and go to the *Job Items* tab.

2) Add a job item of the type 'InvtPart'.

3) Go to the *Act. Mat Usage* tab, and enter actual material usage for this job item. Make sure the actual material usage is different from the charge quantity for this job item.

4) Under the *General* tab, set the status of the service to 'Done'.

5) Create an invoice for the service, and post the invoice to QuickBooks.

6) Click **Post to QuickBooks > Inventory Adjustments**.

7) You'll see that there is now an inventory adjustment waiting to be posted to QuickBooks, with the amount being the difference between the charge quantity and the actual quantity.

8) Select an Account from the *Adjustment Account for Gains* dropdown list and *Adjustment Account for Losses* dropdown list. If you are unsure which QuickBooks account the adjustments should be set to, consult your accountant.

9) Click **Post to QB**. You will see the amount of inventory on hand in QuickBooks for this item has changed by the quantity on the invoice +/- the amount of the inventory adjustment.

CHAPTER 7
MY CALENDAR

This chapter explains My Calendar. My Calendar is the main service-scheduling screen. It displays all of the work scheduled for a given period. By changing the dates at the top of My Calendar, you can view the work for any day, week, month or other period. Services shown in My Calendar can be edited, rescheduled, cancelled or given the status of 'On Route' or 'Done'.

The topics discussed in this chapter include:

- 7.1 Selecting the calendar view
- 7.2 Using the waiting list (for dispatchers)
- 7.3 Adding services directly into My Calendar
- 7.4 Editing services in My Calendar
- 7.5 Printing work orders/route lists
- 7.6 Rescheduling services
- 7.7 Cancelling services
- 7.8 Completing services
- 7.9 Other features in My Calendar

7.1 Selecting the calendar view

My Calendar offers five different views: List, Day, Week, Month and Cust. Each view displays your services in a different format. You can switch views by following the steps outlined below.

To change the view in My Calendar:

1) In My Calendar, click on the drop-down list to the right of *View* and select the appropriate option.

   If you want your services to appear as single line descriptions, select *List*.

   If you want your services to appear as appointment entries (by time), select *Day*, or *Week*.

   If you want to see a monthly summary of the services that you have scheduled, select *Month*.

If you want to view your customers in the left-hand column, the dates at the top of the screen and the services listed below the dates, select *Cust*.

2) Click **Refresh**.

To activate the 'Time On Top' view option:

If you have many crews it may be hard to see the schedule in the regular Day view. The 'Time On Top' view option provides two additional views: "Day: time on top" and "Week: time on top". These views list the crews on the left hand column, and the times on the top, making it easier to see where your all your crews are scheduled at a glance.

1) Click **Edit > Preferences**.

2) Click on the *Day View* tab.

3) Place a check in the *Show 'Time On Top'* checkbox.

4) Click **OK**.

7.2 Using the waiting list (for dispatchers)

The *Waiting List* is a temporary holding place for services that have not yet been assigned to a crew, day, or time. Once services have been added to the waiting list, they can sorted and then "dispatched" to the appropriate crew in My Calendar.

To activate the waiting list feature:

1) In My Calendar, click **Edit > Preferences**.

2) If you typically use the *Day View*, click the *Day View* tab. Otherwise, click on the *List View* tab.

3) Place a check inside the *Show Waiting List* checkbox.

4) Click **OK**.

To add a service to the waiting list:

1) In My Calendar, click **Waiting List > New**.

2) Continue to schedule a one-time/appointment, zone-based or project service. For details one scheduling services see **Section 5**.

Note: Recurring services and billing installments cannot be added to the waiting list.

To dispatch a service from the waiting list to a crew:

1) In My Calendar, the waiting list is shown at the bottom of the screen (as shown below):

2) Locate the service you want to dispatch.

3) If you are in *Day* or *Week View*, click on the *Drag* icon associated with the service, hold down the mouse button and drag the service to the appropriate date, time and crew. Release the mouse button.

   If you are in *List View*, highlight the services in the Waiting List that you wish to dispatch, and then click **Waiting List > Send selected services to My Calendar**.

To place a dispatched service back on the waiting list:

1) In My Calendar, locate the service you want to place back in the Waiting list. If you are in *List View*, make sure you highlight the service you want to send to the Waiting List, and that only one service is highlighted. Then click **Schedule > Place in Waiting List**.

2) Right-click on the appropriate service and select *Place in Waiting List*.

To edit waiting list columns and sorting:

1) In My Calendar, click **Waiting List > Show, hide & sort columns...**

2) The *Preferences* screen will appear.

3) Place a check inside the *Show?* checkbox associated with each column you want to show.

4) The Waiting List is automatically sorted by the order of columns shown in this screen. For example, if you want the waiting list to sort by charge description and then by zip code, you will make sure that “Service” was the first column listed and that “Zip Code” was the second column listed. To move a column towards the top of the list, click on the appropriate column and then click **Move Up**. To move a column downwards, click on the appropriate column and then click **Move Down**.

5) Click **OK**.

7.3 Adding services directly into My Calendar

At times, it will be more efficient to add new services directly into My Calendar rather than scheduling the services using the customer screen. For example, if you go to a job site for a scheduled service, and the customer asks for an additional service, you will want to include the additional service as a part of the day's work - even though it was not originally scheduled. In this situation, it is much faster to add the additional service directly into My Calendar at the end of the day.

To add a service into My Calendar:

1) Click **Schedule > New**.

2) The *New Schedule* screen will appear.

3) The *Type* box indicates the type of service you are adding. Choose the type by clicking on the drop-down list and selecting the appropriate option.

4) The *Charge Description* box indicates the specific name of the service that you are adding. Choose the charge description by clicking on the drop-down list and selecting the appropriate option.

5) The *For customer* box indicates the customer that received/will receive the service. Enter the customer by clicking on the drop-down list and selecting the appropriate option. You can also search for the customer by clicking on the *Find* icon to the right of the drop-down list.

6) Click **OK**.

7) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

8) To learn about setting up different types of services, read **Chapter 5**.

7.4 Editing services in My Calendar

In My Calendar, you have the ability to edit the information for a specific service date or for an entire series of a recurring service. For example, you can change the price for *Service 1* that is scheduled for Mrs. Smith on December 2, 2007 or you can change the prices for every *Service 1* that Mrs. Smith will receive throughout the entire year.

The steps to editing services in My Calendar are outlined below.

To edit a specific date of a recurring service in My Calendar:

1) Locate the service that you want to edit in My Calendar.

2) Make sure that the service has the status of *On Route* or *Done*.

   If you are not sure of the service's status, hover your cursor over the *Sts* column. A tag will appear that will display the status of the service.

   If the service's status is not *On Route* or *Done* highlight the service and click **Schedule > Status to 'On Route'**.

3) Click **Schedule > Edit**.

Note: If the service that you are going to edit is part of a recurring series the following screen will appear:

Click on *Open this occurrence*. Click **OK**.

4) The *One time service, Zone-based service, Recurring services series, Multi-day project,* or *Billing installment series* screen will appear (depending on the type of service).

5) Edit the information as required.

6) Click **OK** to save the information and return to the previous screen.

To edit all pending dates (the series) of a recurring service:

1) Locate the service in My Calendar.

2) Clicked **Schedule > Edit**.

3) If you receive a prompt to open the occurrence or series, click *Open the series* and click **OK**.

To edit several services in My Calendar:

1) Locate the services in My Calendar.

2) Make sure that the services all have the status of *On Route*.

If you are not sure of the status of the services, hover your cursor over the *Sts* column. A tag will appear that will display the status of the services.

If the status of the services is not *On Route* highlight the services and click **Schedule > Status to 'On Route'**.

3) Highlight all of the services that you want to edit.

4) Click **Activities > Selected Jobs/Charges**.

If you want to change the invoice type of all of the services, click **Invoice Type...** The *Enter Invoice Number* screen will appear. Type the appropriate invoice type into the box. Click **OK**.

If you want to assign all of the services to another crew, click **Move To Crew...** The *Enter Crew* screen will appear. Type the appropriate crew number into the box. Click **OK**.

If you want to change the quantity associated with the services, click **Change Qty...** The *Enter Desired Quantity* screen will appear. Type the appropriate quantity into the box. Click **OK**.

If you want to reschedule all of the services to another day, click **Move To Day...** The *Enter New Date* screen will appear. Type the appropriate date into the box. For example, if you want to reschedule the services to June 1, 2007, type *6/1/07* into the box. Click **OK**.

7.5 Printing work orders/route lists

Work orders/route lists display all of the services that have to be completed in a specific day. Among other information, work orders/route lists show customer name, job site, phone number and the instructions for crew. Work orders/route lists are typically printed at the beginning of each day and then given to your crews so that they have a list of their work for the day.

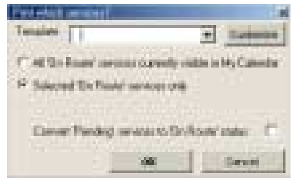
Work Orders are typically printed one service per page, which a route list is printed with many services per page.

To print a work order/route list:

1) Highlight the services that you want to include on the work order/route list. If you want to print <u>all</u> services, you do not need to highlight any services.

2) Click **Activities > Print > Work Orders/Route Lists**.

3) The *Print which services* screen will appear:

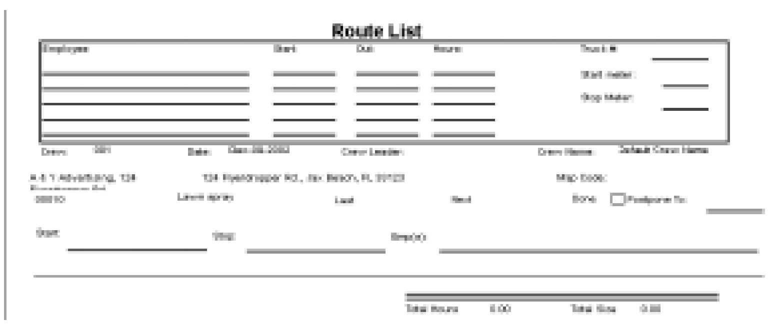


4) The *Template* box indicates the template that you want to use to print your work order/route list. Enter the template by clicking on the drop-down list and selecting the appropriate option.

Note: You can download templates, or create your own template, by using the Template Designer feature. To learn more about this feature, consult the Template Designer manual, available from www.alocet.com, under the Support > QXpress > Documentation section.

5) Click **OK**.

6) The work order/route list will print to screen:



7) To print a hardcopy of the work order/route list, click **Print**.

7.6 Rescheduling services

In the event that you do not complete all of the services that you scheduled for a particular day, you can reschedule those services for another day. The steps involved in rescheduling a service are explained below.

To reschedule a service:

1) In My Calendar, highlight the services that you want to reschedule.

2) Click **Activities > Reschedule/Postpone**.

3) The *Enter New Date* screen will appear.

4) Type the new date into the box.

5) Click **OK**.

6) Click **Refresh**.

7.7 Cancelling services

In some instances, services may have to be cancelled. Cancelling services will remove those specific services from My Calendar. However, if the service is part of a recurring series, the rest of the series remains in tact. For example, if you have set-up a monthly service for *Mr. Smith* and you cancel his January service, only the January service is cancelled - all other months are still scheduled.

The steps required to cancel a service are outlined below.

To cancel services:

1) In My Calendar, highlight the services that you want to reschedule.

2) Click **Schedule > Status to ‘Cancel’**.

3) Answer **Yes** to the prompt.

7.8 Completing services

To indicate that a service is complete, you must change the status of the service to *Done*. This process is usually carried out at the end of the day, or the next morning.

If the service’s invoice type is 1 or 3, completing the service makes it eligible to be invoiced.

If the service’s invoice type is 2, completing the service increases accounts receivable by the price of the service.

To complete a service:

1) In My Calendar, highlight the services that you want to complete.

2) Click **Schedule > Status to ‘Done’**.

7.9 Other features in My Calendar

My Calendar provides you with many other features designed to make it as quick and easy as possible to manage your services. These features are outlined below.

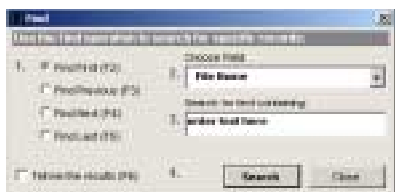
7.9.1 Finding specific services

The *Find* feature enables you to find and highlight a specific service in My Calendar. This feature is particularly useful when you are looking for a service when My Calendar is displaying a large amount of information.

To find a specific service in My Calendar:

1) Click **Schedule > Find**.

2) The *Find* screen will appear:



3) Section 1 of the screen indicates whether you want to find the first, previous, next or last service that matches your criteria. Indicate whether you want to find the first, previous, next or last service by clicking on the appropriate option.

4) Section 2 of the screen indicates the field that you want to search on. Enter the field that you want to search on by clicking on the drop-down list and selecting the appropriate option.

5) Section 3 of the screen indicates the text that you want to search for. For example, if you are searching for the filename Smith type *Smith* into this box.

6) Click **Search**.

7) The appropriate service will be highlighted in My Calendar.

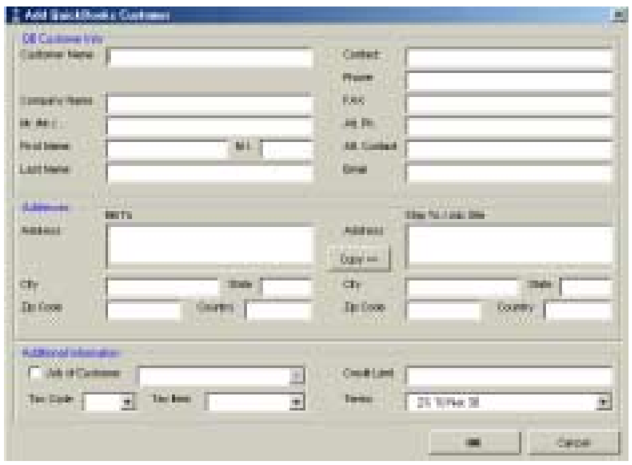
7.9.2 Adding/editing customer information:

If you are using QuickBooks Pro 2002 or later, you can add new customers directly into QXpress via My Calendar. Adding a customer in QXpress will automatically add the same customer into QuickBooks. The steps for adding a customer account are outlined below. **If you are using a version prior to QuickBooks Pro 2002, you must add new customers into QuickBooks and then reopen QXpress to automatically import the information.**

To add a new customer from My Calendar:

1) Click **Customers > New QuickBooks Customer**.

2) The *Add QuickBooks Customer* screen will appear.



3) Enter the appropriate information into the boxes provided.

4) Click **OK** to save the information and return to the previous screen.

To edit customer information from My Calendar:

1) Click **Customers > Edit QuickBooks Customer...**

2) The *Edit QuickBooks Customer* screen will appear.

3) Edit the information as required.

4) Click **OK** to save the information and return to the previous screen.

7.9.3 ‘Select All’ feature

This feature enables you to highlight all of the services of a particular status, type or invoice type. Using this feature makes it much faster to highlight services then doing so one-at-a-time.

To select all of the services with the same status:

1) Click **Activities > Select All > Sts**.

    If you want to select all of the services with a status of *Pending*, select **Pending**.

    If you want to select all of the services with a status of *On Route*, select **On Route**.

    If you want to select all of the services with a status of *Done*, select **Done**.

2) All of the services of the selected status will be highlighted.

To select all of the services of the same type:

1) Click **Activities > Select All > Typ**.

    If you want to select all of the *services,* click **Service**.

    If you want to select all of the *contract billings,* click **Contract Billing**.

    If you want to select all of the *project visits,* click **Project Visit**.

2) All of the services of the selected type will be highlighted.

To select all of the services with the same invoice type:

1) Click **Activities > Select All > Inv > (now select the appropriate invoice type)**.

2) All of the services of the selected invoice type will be highlighted.

7.9.4 Memorizing services

This feature allows you to memorize a group of services so that you can either display only those services or you can recall those services at a later time.

To memorize specific services:

1) Highlight the jobs that you want to memorize.

2) Click **Activities > Selected Jobs / Charges > Memorize Selected Charges**.

3) The services have now been memorized.

To display only the last services that you memorized:

1) Click **Activities > Selected Jobs / Charges > Show Only Last Memorized Charges**.

2) Only the last memorized services will be shown in My Calendar.

7.9.5 Work Order Numbers

Work Order Numbers are assigned automatically to each service that is added to QXpress. These work order numbers make it easy to locate a specific service in My Calendar.

To active work order numbering:

1) In My Calendar, click **Edit > Preferences**.

2) Click the *Routing & Scheduling* tab.

3) Place a check inside the *Use Work Order* numbering checkbox.

4) Click **OK**.

5) In My Calendar, click **Refresh**. The *Work Order #* column will now appear in My Calendar *List* view. As well, the *WO#* column will now appear in the *Customer* account.

To find a service by work order number:

1) In My Calendar, change the *From* and *To* dates to include the date that the service is scheduled for.

2) Click **Refresh**.

3) Click **Schedule > Find**.

4) The *Find* screen will appear.

5) Click on the *Choose Field* drop-down list and select *Work Order #*.

6) Type the work order number into *Section 3* of the *Find* screen.

7) Click **Search**.

7.9.6 Dispatching to Email / Pager

If you are connected to the Internet, are in Day View, Week View, or Cust View, and have a service with the status of 'On Route', you can dispatch a service to a technician's mobile phone. Most mobile phones enable text messaging or paging by sending an email to a specific email address. For example, if you are using Nextel and have a technician with the phone number (703) 555-1234, you can send a text message to that phone by emailing 7035551234@messaging.nextel.com.

To dispatch to Email / Pager:

1) Make sure you are in *Day View*, *Week View* or *Cust View*.

2) Ensure the service has a status of *On Route*.

3) Right-click on a service in My Calendar, and choose **Dispatch to email / pager**.

4) Enter information into the appropriate fields and click **Send**.

CHAPTER 8
INVOICING

This chapter explains how to generate invoices for your customers. Once invoices have been generated, the invoice information can be quickly posted to QuickBooks.

The topics discussed in this chapter include:

8.1 Payment collected at time of service

(available only in QXpress Gold, Platinum, Enterprise)

Many service companies collect a payment from the customer at the time of service. For these types of service companies, the ‘Payment collected at time of service’ feature allows you to enter the payment into QXpress when you are making any other edits to the service.

To enter a ‘Payment collected at time of service’:

1) Edit the occurrence of any service (i.e. do not edit the series of a recurring service).

2) Click on the *Job Items* tab.

3) In the lower left-hand corner, place a check in the *Payment collected at time of service* checkbox.

4) Enter the *Amount, Pmt. Method and Deposit To* values.

5) Finish any other edits to the service. When you are finish editing the service, click OK, or click on the *Quick Invoice* icon. The payment will get

posted in QuickBooks once the invoice gets posted from QXpress to QuickBooks.

Note: For your convenience, QXpress will memorize the relationship between the *Pmt. Method* and *Deposit To*, so that the next payment you receive will have the *Deposit To* automatically filled in based on the *Pmt. Method*.

8.2 Type 1 invoicing - End of period

Type 1 invoicing is designed for companies that provide recurring services and invoice for those services at the end of a specified period (i.e. at the end of the week, or at the end of the month).

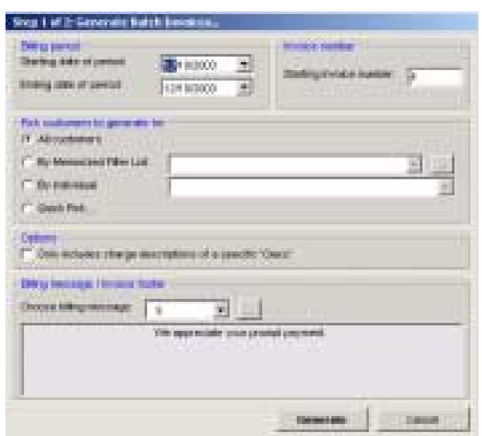
With *Type 1* invoicing, you will print your route lists each day, and come back at the end of the day to turn the status of services to ‘Done’. Then at the end of your billing period, usually the last day of the month, you will turn your completed services into one invoice per customer for all the work done, and then post the invoices to QuickBooks.

To generate invoices at the end of a period:

Note: Only services that have a status of *Done* can be invoiced using Type 1 invoicing. Therefore, if you are trying to use Type 1 invoicing, but you are getting a message that says ‘QXpress could detect no Batch Type charges (#1 or #4) that have been completed and fit the above criteria’ go into My Calendar and make sure that the services you are trying to invoice have Type 1 invoicing and have the status of *Done*.

1) Click **Invoices > Generate Invoices**.

2) The *Step 1 of 2: Generate Batch Invoices* screen will appear:



3) The *Starting/Ending date of period* boxes indicate the period that you want to invoice for. For example, if you want to invoice for the month of June,

2005, you will enter *6/1/05* into the *Starting date of period* box and *6/30/05* into the *Ending date of period* box.

4) The *Pick customers to generate for* section indicates the customers that you want to invoice. Usually you will select *All customers*, as QXpress will search all customers for completed Type 1 invoicing services, and ignore those that don't have them.

If you want to invoice all of your customers, click *All customers*. Click **Generate**.

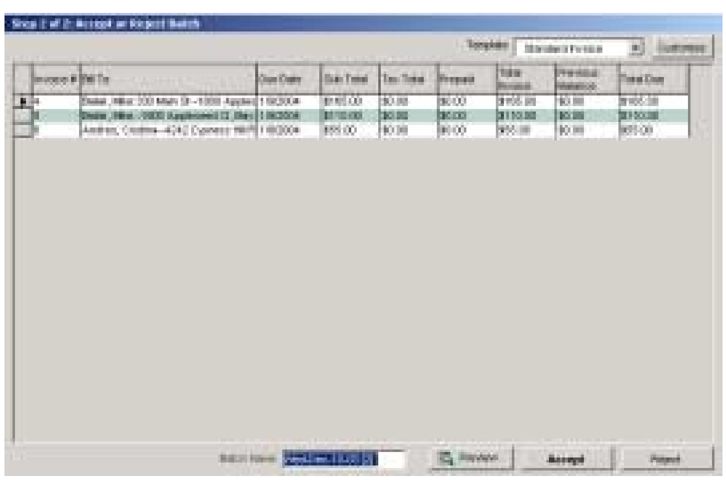
If you want to invoice only those customers included on one of your memorized lists, click *By Memorized Filter List*. Next, click on the drop-down list and select the appropriate option. Click **Generate**.

If you want to invoice a specific customer, click *By Individual*. Next, click on the drop-down list and select the appropriate option. Click **Generate**.

If you want to manually select the customers you want to invoice, click *Quick Pick...* Click **Generate**. The *Generate Invoices* screen will appear. Place a check inside the boxes corresponding to the customers that you want to invoice. Click **OK**.

Note: As a QXpress user, you will be generating a batch of invoices in QXpress, and posting that batch of invoices to QuickBooks. But where you actually print the invoices is up to you. If you want to print invoices in QuickBooks rather than QXpress, one short-cut is to put a check in the *Skip print invoice screen* checkbox, and remove the check from the *Skip Post to QB screen* checkbox.

5) The *Step 2 of 2: Accept or Reject Batch* screen will appear:



Note: At this point, the invoices have been created, but the information has not yet been updated in QXpress. If you want to preview the invoices before the information is updated in the program, click **Preview**. This will allow you to scroll through each of the invoices to ensure the information is correct.

6) Choose an invoice template by clicking on the drop-down list to the right of *Template* and selecting the appropriate option.

7) Click **Accept**.

8) The invoices will print to screen.

9) To print a hardcopy of the invoices, click **Print**.

8.3 Type 2 invoicing - From route list

Type 2 invoicing is designed for companies that print invoices before they do the work so that they can leave an invoice at the job site. Type 2 invoicing enables you to print the invoice before the work is completed, however, the customers' accounts receivable does not increase until the status of the service becomes *Done*.

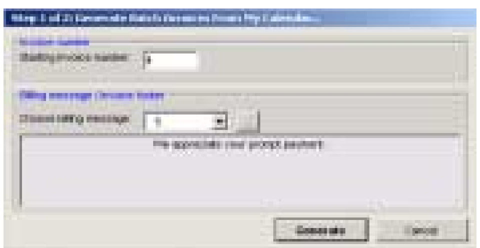
To generate invoices before the work is completed:

Note: Only services that have the status of *On Route* can be invoiced using Type 2 invoicing. Therefore, if you are trying to invoice and you are getting an error, make sure that the services you are invoicing are set-up for Type 2 invoicing, have the status of *On Route*, and have not been invoiced before.

1) In My Calendar, highlight the service(s) that you want to invoice.

2) Click **Activities > Print > Print Invoices**.

3) The *Step 1 of 2: Generate Invoices From My Calendar* screen will appear:



4) The *Starting Invoice Number* indicates the invoice number that will appear on the first invoice. You can change this number by typing a new number into the box.

5) The *Choose billing message* box indicates the billing message that will appear on the bottom of each of the invoices. Enter the billing message by clicking on the drop-down list and selecting the appropriate option.

6) Click **Generate**.

Note: As a QXpress user, you will be generating a batch of invoices in QXpress, and posting that batch of invoices to QuickBooks. But where you actually print the invoices is up to you. If you want to print invoices in QuickBooks rather than QXpress, one short-cut is to put a check in the *Skip print invoice screen* checkbox, and remove the check from the *Skip Post to QB screen* checkbox.

7) The *Step 2 of 2: Accept or Reject Batch* screen will appear:

Note: At this point, the invoices have been created, but the information has not yet been updated in QXpress. If you want to preview the invoices before the information is updated in the program, click **Preview**. This will allow you to scroll through each of the invoices to ensure the information is correct.

8) Choose an invoice template by clicking on the drop-down list to the right of *Template* and selecting the appropriate option.

9) Click **Accept**.

10) The invoices will print to screen.

11) To print a hardcopy of the invoices, click **Print**.

8.4 Type 3 invoicing - Upon completion

Type 3 invoicing is designed for companies that invoice services immediately after they are completed. Type 3 invoicing enables companies to quickly recover accounts receivable on services.

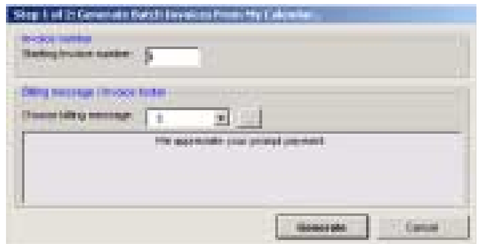
To invoice upon completion of a service:

Note: Only services that have the status of *Done* can be invoiced using Type 3 invoicing. Therefore, if you are trying to invoice and you are getting an error, make sure that the services are set-up for Type 3 invoicing and that their status is *Don*e.

1) In My Calendar, highlight the service(s) that you want to invoice.

2) Click **Activities > Print > Print invoices**.

3) The *Step 1 of 2: Generate Invoices From My Calendar* screen will appear:



4) The *Starting Invoice Number* indicates the invoice number that will appear on the first invoice. You can change this number by typing a new number into the box.

5) The *Choose billing message* box indicates the billing message that will appear on the bottom of each of the invoices. Enter the billing message by clicking on the drop-down list and selecting the appropriate option.

6) Click **Generate**.

Note: As a QXpress user, you will be generating a batch of invoices in QXpress, and posting that batch of invoices to QuickBooks. But where you actually print the invoices is up to you. If you want to print invoices in QuickBooks rather than QXpress, one short-cut is to put a check in the *Skip print invoice screen* checkbox, and remove the check from the *Skip Post to QB screen* checkbox.

7) The *Step 2 of 2: Accept or Reject Batch* screen will appear:

Note: At this point, the invoices have been created, but the information has not yet been updated in QXpress. If you want to preview the invoices before the information is updated in the program, click **Preview**. This will allow you to scroll through each of the invoices to ensure the information is correct.

8) Choose an invoice template by clicking on the drop-down list to the right of *Template* and selecting the appropriate option.

9) Click **Accept**.

10) The invoices will print to screen.

11) To print a hardcopy of the invoices, click **Print**.

8.5 Editing invoices

This feature enables you to change the information on an invoice after it has been generated. Once an invoice has been edited, it can be reprinted and sent to the appropriate customer.

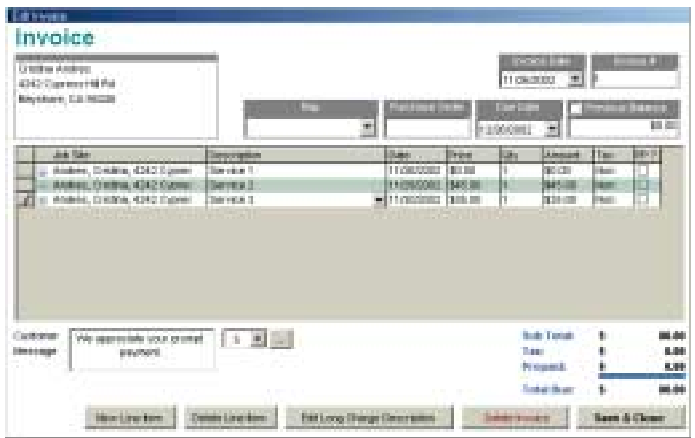
To add a new charge to an invoice:

1) Do one of the following:

   If you are in the customer's account, click **Customer > Invoices for this customer**. The *Invoice List* screen will appear. Highlight the invoice that you want to edit. Click **Edit Invoice**.

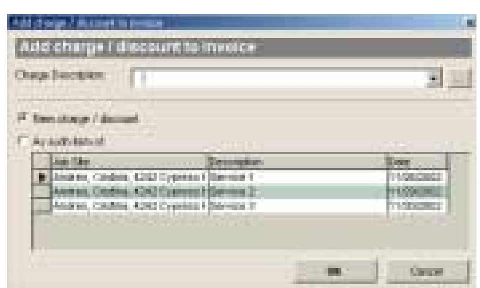
   If you are in any other screen, click **Invoices > Invoice List**. The *Invoice List* screen will appear. Highlight the invoice that you want to edit. Click **Edit Invoice**.

2) The *Edit Invoice* screen will appear:



3) Click **New Line Item**.

4) The *Add charge/discount to invoice* screen will appear:



5) The *Charge Description* box indicates the charge that you are adding. Enter the charge by clicking on the drop-down list and selecting the appropriate option.

6) Click **OK**.

7) The new line item will appear on the invoice.

8) Enter the appropriate price into the *Price* column.

9) Click **Save & Close** to save the information and return to the previous screen.

To delete a charge from an invoice:

1) Do one of the following:

   If you are in the customer's account, click **Customer > Invoices for this customer**. The *Invoice List* screen will appear. Highlight the invoice that you want to edit. Click **Edit Invoice**.

   If you are in any other screen, click **Invoices > Invoice List**. The *Invoice List* screen will appear. Highlight the invoice that you want to edit. Click **Edit Invoice**.

2) The *Edit Invoice* screen will appear.

3) Highlight the charge that you want to remove from the invoice.

4) Click **Delete Line Item**.

5) Answer **Yes** to the prompt.

6) Click **Save & Close** to save the information and return to the previous screen.

To change the invoice / due date:

1) Do one of the following:

   If you are in the customer's account, click **Customer > Invoices for this customer**. The *Invoice List* screen will appear. Highlight the invoice that you want to edit. Click **Edit Invoice**.

   If you are in any other screen, click **Invoices > Invoice List**. The *Invoice List* screen will appear. Highlight the invoice that you want to edit. Click **Edit Invoice**.

2) The *Edit Invoice* screen will appear.

3) The invoice/due date boxes are shown in the top right-hand corner of the screen. Change the dates by clicking on the drop-down list and using the calendar provided.

4) Click **Save & Close** to save the information and return to the previous screen.

To remove the previous balance from an invoice:

1) Do one of the following:

   If you are in the customer's account, click **Customer > Invoices for this customer**. The *Invoice List* screen will appear. Highlight the invoice that you want to edit. Click **Edit Invoice**.

   If you are in any other screen, click **Invoices > Invoice List**. The *Invoice List* screen will appear. Highlight the invoice that you want to edit. Click **Edit Invoice**.

2) The *Edit Invoice* screen will appear.

3) The *Previous Balance* box is displayed in the top right-hand corner of the screen. Remove the check from the checkbox beside *Previous Balance*.

4) Click **Save & Close** to save the information and return to the previous screen.

To edit the billing message printed on an invoice:

1) Do one of the following:

   If you are in the customer's account, click **Customer > Invoices for this customer**. The *Invoice List* screen will appear. Highlight the invoice that you want to edit. Click **Edit Invoice**.

   If you are in any other screen, click **Invoices > Invoice List**. The *Invoice List* screen will appear. Highlight the invoice that you want to edit. Click **Edit Invoice**.

2) The *Edit Invoice* screen will appear.

3) The *Customer Message* is displayed in the bottom left-hand corner of the screen. Change the message by clicking on the drop-down list and selecting the appropriate option.

4) Click **Save & Close** to save the information and return to the previous screen.

To edit the long charge description printed on an invoice:

1) Do one of the following:

   If you are in the customer's account, click **Customer > Invoices for this customer**. The *Invoice List* screen will appear. Highlight the invoice that you want to edit. Click **Edit Invoice**.

If you are in any other screen, click **Invoices > Invoice List**. The *Invoice List* screen will appear. Highlight the invoice that you want to edit. Click **Edit Invoice**.

2) The *Edit Invoice* screen will appear.

3) Click on the line item you want to change the Long Charge Description for.

4) Click **Edit Long Charge Description**.

5) The *Long Charge Description* screen will appear.

6) Type the new long charge description into the box provided.

7) Click **OK** to save the information and return to the previous screen.

To delete an invoice:

1) Do one of the following:

If you are in the customer's account, click **Customer > Invoices for this customer**. The *Invoice List* screen will appear. Highlight the invoice that you want to edit. Click **Edit Invoice**.

If you are in any other screen, click **Invoices > Invoice List**. The *Invoice List* screen will appear. Highlight the invoice that you want to edit. Click **Edit Invoice**.

2) The *Edit Invoice* screen will appear.

3) Highlight the invoice that you want to delete.

4) Click **Delete**.

5) Answer **Yes** to the prompt.

6) Click **Close** to save the information and return to the previous screen.

8.6 Re-printing existing invoices

Invoices that are generated in QXpress are stored permanently. This means that any invoice can be re-printed at any time. There are two ways to re-print invoices. First, you can re-print a single invoice for a specific customer from the customer's account. Second, you can re-print a batch of invoices from the *Invoice List* screen. Both methods of re-printing invoices are outlined below.

To re-print a single invoice for a specific customer:

1) Go to the customer’s account.

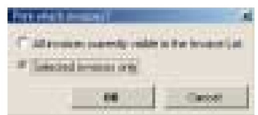
2) Click **Customer > Invoices for this customer**.

3) The invoice list screen will appear.

4) Highlight the invoice that you want to re-print.

5) Click **Print**.

6) A prompt will appear as shown below:



7) Click on *Selected invoices only*.

8) Click **OK**.

9) The invoice will print to screen.

10) Click **Print**.

To re-print an entire batch of invoices:

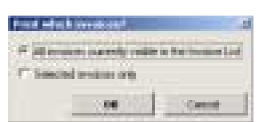
1) In the menu bar, click **Invoices > Invoice List**.

2) The *Invoice List* screen will appear.

3) The *Show* box in the top left-hand corner of the screen indicates the invoices that are shown in the invoice list. Click on the drop-down list and select the appropriate option. For example, if you want to include every invoice in the last two months, select *Last 2 months*.

4) Click **Print**.

5) A prompt will appear as shown below:



6) Select *All invoices currently visible in the Invoice List*.

7) Click **OK**.

8) The invoices will print to screen.

9) Click **Print**.

8.7 Posting invoices to QuickBooks

After generating invoices in QXpress, you can easily post these invoices to QuickBooks. Doing so will update QuickBooks and make it appear as if you had invoiced your customers from QuickBooks.

Note: It is only possible to post invoices to QuickBooks if the invoices already exist in QXpress. To learn about generating invoices read **section 8.1**, **8.2** and/or **8.3**.

To post invoices to QuickBooks:

1) In the menu bar, click **Post To QuickBooks > Invoices**.

2) The *Post Invoices To QuickBooks* screen will appear.

3) All of the invoices that you have generated, but that you have <u>not</u> already posted to QuickBooks, will appear on the screen**.**

4) Click **Post To QB**.

5) A message box will appear once the export has been successful.

6) Click **OK**.

7) Click **Close** to return to the previous screen.

Note: The invoices that are shown behind the *Not 'Ready' to send to QB* tab are there because they are Type 2 invoices for services that have not yet had their status changed to *Done*. In order to move these invoices from *Not 'Ready' to send to QB* to *'Ready' to send to QB*, change the status of the appropriate services to *Done*.

8.8 Quick Invoice - create & post invoices directly from service

(available only in QXpress Gold, Platinum, Enterprise)

For many companies that use 'Invoice Upon Completion' invoicing, the process to create a batch of invoices to send from QXpress to QuickBooks can be seen as cumbersome. This is especially the case when most services need to be edited at the end of the day.

For this reason, the Quick Invoice feature cuts out many unnecessary steps, and is more intuitive for those who just want to edit a service, put in times, materials, and payments received in the field, and post the service as an invoice to QuickBooks, all in one convenient step.

To use the Quick Invoice feature:

1) Edit the occurrence of any service (i.e. do not edit the series of a recurring service).

2) After making any final edits to the service in the *Service* screen, click on the Quick Invoice icon to the right of the Activities button.

3) Set any preferences in the *Quick Invoice - Generate & Post to QuickBooks* screen.

4) Click **Generate & Post to QuickBooks**.

5) The service will automatically be set to the status of 'Done', an invoice will be created, and then posted to QuickBooks. Also, if you entered a 'Payment collected at time of service', the payment would get posted at this time as well.

CHAPTER 9
CONTACT MANAGER

This chapter explains how to use the contact manager features in QXpress. The contact manager feature enables you to schedule reminders for important events such as meetings, site visits or phone calls. The contact manager can even be used to remind you about regular company equipment maintenance.

The topics discussed in this chapter are:

- 9.1 Working with events
- 9.2 Working with contact groups
- 9.3 Using filter conditions
- 9.4 Using show/hide columns
- 9.5 Setting contact events to appear in Day / Week view
- 9.6 Setting up Alerts to appear when a service is scheduled

9.1 Working with events

Events is the name given to the reminders, conversations, or notes that you enter into contact manager. In other words, when you schedule a reminder, record a conversation, or leave a note from yourself to another staff member, you are creating a contact manager event.

The process for creating a contact manager event is explained below.

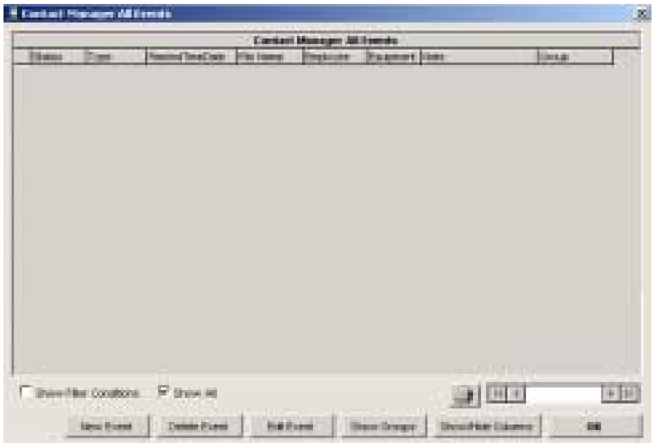
To add a new event:

1) Do one of the following:

   From the customer screen, click Customer > Contact manager.

   From other screens in QXpress, click Lists > Contact Manager.

2) The *Contact Manager All Events* screen will appear.



3) Click **New Event**.

4) The *Add/Edit Event* screen will appear.

5) The *Customer* box indicates the name of the customer that the event involves. For example, if the event is a reminder to call *Mrs. Smith*, then *Mrs. Smith* will be entered into this box. Select the customer by clicking on the drop-down list and choosing the appropriate option. Selecting the customer is optional.

6) The *Group* box indicates the group that the event belongs to. For more information on Contact Manager Groups read **section 9.2**. Select a group by clicking on the drop-down list and choosing the appropriate option.

7) The *Event Type* box indicates the type of event being added (i.e. phone call, E-mail, site visit, etc.) Select the type of event by clicking on the drop-down list and choosing the appropriate option.

Note: If the appropriate type is not shown in the drop-down list, click on the **Details** box to the right of *Event Type* and add a new type.

8) The *Event Status* box displays the current status of the event. Select the status by clicking on the drop-down list and choosing the appropriate status.

Note: If the appropriate status is not shown in the drop-down list, click on the **Details** box to the right of *Event Status* and add a new status.

Note: Only event status with a checkbox in the *Remind Me* column will cause contact manager event reminders.

9) The *Employee* box displays the employee that the event is being entered for, or entered by. For example, if you are scheduling a reminder for *Johnny Hardworker* to call *Mrs. Smith,* you will enter *Johnny Hardworker* into the box. Select the employee by clicking on the drop-down list and choosing the appropriate option. Selecting the employee is optional.

10) The *Equipment* box displays the piece of equipment that the event involves. For example, if you are scheduling a reminder for regular maintenance on your *GMC Truck*, you will enter *GMC Truck* into the box. Select the piece of equipment by clicking on the drop-down list and choosing the appropriate option. Selecting the equipment is optional.

11) The *Remind Time/Date* boxes display the time and date that you want a reminder to appear in QXpress. Use the drop-down lists to select the appropriate time and date. Be sure to indicate whether the time is AM or PM. If the event status is not set to cause reminders, you do not have to set a remind time.

12) The *Attached File* box allows you to attach any windows document to this file. Specifically, you may want to attach a Word document, digital picture, Excel file, or any other file on your hard drive. You can also enter Internet URL addresses into the Attached File box. By clicking **Open Attached File** QXpress will prompt the appropriate Windows program to open the file.

13) The *Notes* box provides space for you to enter a note about the event. Type the note into the box. The **Time Stamp** button will place a new line in the note along with the Login user who is logged into QXpress, and the exact current time.

14) Click **OK** to save the information and return to the previous screen.

Note: A new event can also be added quickly from the customer screen by clicking **History > New Contact...**, when the *History* tab is selected, or by typing Alt+C, with any other other tab selected.

To edit an event:

1) Do one of the following:

   In the Customer screen, click on the History tab, and double-click on the contact manager event you wish to edit.

   From My Calendar, in the menu bar, click **Lists > Contact Manager**. The *Contact Manager All Events* screen will appear. Highlight the event that you want to edit. Click **Edit Event**.

2) Edit the information as required.

3) Click **OK** to save the information and return to the previous screen.

To delete an event:

1) In the menu bar, click **Lists > Contact Manager**.

2) The *Contact Manager All Events* screen will appear.

3) Highlight the event that you want to delete.

4) Click **Delete Event**.

5) Answer **Yes** to the prompt.

6) Click **OK** to save the information and return to the previous screen.

9.2 Working with contact groups

A *contact group* is a collection of events that all relate to a common topic. For example, if you are contacting your top 20 customers to offer them a “we appreciate your business” promotion, you may want to place all of the events involving that promotion into one group. That way, you can follow the progression of that initiative independent of all other contacts.

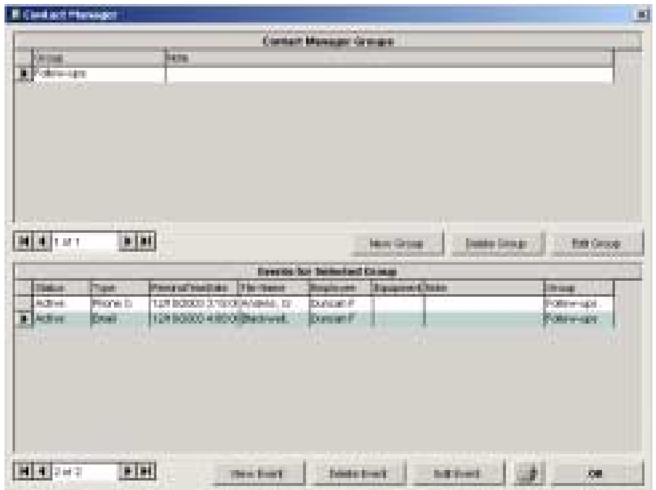
To add a new contact group:

1) In the menu bar, click **Lists > Contact Manager**.

2) The *Contact Manager All Events* screen will appear.

3) Click **Show Groups**.

4) The *Contact Manager Groups* screen will appear.



5) Click **Add Group**.

6) The *Add/Update Group* screen will appear.

7) Enter the name of the group into the space provided.

8) Click **Close (Esc)** to save the information and return to the previous screen.

To edit a contact group:

1) In the menu bar, click **Lists > Contact Manager**.

2) The *Contact Manager All Events* screen will appear.

3) Click **Show Groups**.

4) The *Contact Manager Groups* screen will appear.

5) Highlight the group that you want to edit.

6) Click **Edit Group**.

7) The *Add/Update Group* screen will appear.

8) Edit the information as required.

9) Click **Close (Esc)** to save the information and return to the previous screen.

To delete a contact group:

1) In the menu bar, click **Lists > Contact Manager**.

2) The *Contact Manager All Events* screen will appear.

3) Click **Show Groups**.

4) The *Contact Manager Groups* screen will appear.

5) Highlight the group that you want to delete.

6) Click **Remove Group**.

7) Answer **Yes** to the prompt.

8) Click **Close (Esc)** to save the information and return to the previous screen.

9.3 Using filter conditions

Filter conditions allow you to define the events you want to see on the contact manager screen. For example, if you do not want to view all of the company's events, but only those applicable to you, you will use the filter conditions to do this.

Once you have set your filter conditions, you can save those conditions so that you can recall them the next time you open the contact manager. Each person using the contact manager can save their own conditions so that they are always viewing the events that are most important to them.

To create a new filter:

1) In the menu bar, click **Lists > Contact Manager**.

2) The *Contact Manager All Events* screen will appear.

3) Place a check in the *Show Filter Conditions* checkbox. This check box is found in the bottom left-hand corner of the screen.

4) The advanced filter conditions will appear at the top of the screen.

5) The *Type* filter enables you to see only events of a certain type (i.e. E-mail, phone call, site visit, etc.).To filter by type, click on the **Details** box to the right at *Type*. The *Add Event Type Filter* screen will appear. The types that are currently showing are listed on the left-hand side. If you want to hide a type, click on that type and click on the second arrow button in the middle of the screen. Click **Close (Esc)**.

6) The *Status* filter enables you to see only events of a certain status (i.e. active, cancelled, done, etc.).To filter by status, click on the **Details** button to the right of *Status*. The *Add Event Status Filter* screen will appear. The statuses that are currently showing are listed on the left-hand side. If you want to hide a status, click on that status and click on the second arrow button in the middle of the screen. Click **Close (Esc)**.

7) The *Remind Time/Date* filter enables you to see only events scheduled for a certain time/date.To filter by time/date, click on the **Details** button to the right of *Time/Date*. The *Add Time/Date Filter* screen will appear. Enter the appropriate date range. Click **Close (Esc)**.

8) The *Filename* filter enables you to see only events related to a certain filename. To filter by filename, click on the **Details** button to the right of *Filename*. The *Add Event Filename Filter* screen will appear. The filenames that are currently showing are listed on the left-hand side. If you want to hide a filename, click on that filename and click on the second arrow button in the middle of the screen. Click **Close (Esc)**.

9) The *Employee* filter enables you to see only events scheduled for a specific employee.To filter by employee, click on the **Details** button to the right of *Type*. The *Add Event Employee Filter* screen will appear. The employees that are currently showing are listed on the left-hand side. If you want to hide an employee, click on that employee and click on the second arrow button in the middle of the screen. Click **Close (Esc)**.

10) The *Equipment* filter enables you to see only events scheduled for a specific piece of equipment.To filter by equipment, click on the **Details** button to the right of *Equipment*. The *Add Event Equipment Filter* screen will appear. The pieces of equipment that are currently showing are listed on the left-hand side. If you want to hide a piece of equipment, click on that piece of equipment and click on the second arrow button in the middle of the screen. Click **Close (Esc)**.

To save a filter:

1) After going through the steps to create a filter, and while you are still in the *Contact Manager All Events* screen, click **Save Filter**.

2) Enter a name for the filter into the box provided.

3) Click **OK**.

To recall a filter:

1) In the menu bar, click **Lists > Contact Manager**.

2) The *Contact Manager All Events* screen will appear.

3) Place a check in the *Show Filter Conditions* checkbox. This check box is found in the bottom left-hand corner of the screen.

4) The filter conditions will appear at the bottom of the screen.

5) Click on the drop-down list to the right of *Choose a Search Filter* and select the appropriate option.

To delete a filter:

1) In the menu bar, click **Lists > Contact Manager**.

2) The *Contact Manager All Events* screen will appear.

3) Place a check in the *Show Filter Conditions* checkbox. This check box is found in the bottom left-hand corner of the screen.

4) Click on the drop-down list to the right of *Choose a Search Filter* and select the filter that you want to delete.

5) Click **Delete Filter**.

6) Answer **Yes** to the prompt.

9.4 Using show/hide columns

The *show/hide columns* feature enables you to customize the information shown on the contact manager screen by giving you the ability to show or hide specific columns.

To use the show/hide feature:

1) In the menu bar, click **Lists > Contact Manager**.

2) The *Contact Manager All Events* screen will appear.

3) Click **Show/Hide Columns**.

4) The *Show/Hide* columns screen will appear.

5) Place a check in the *Show?* column of the columns you want to see, and remove the check from the columns you do not want to see.

9.5 Setting contact events to appear in Day / Week view

Contact manager events can appear as appointments in the Day and Week view of *My Calendar*.

The follow criteria have to be met for a Contact Manager Event to appear in *My Calendar*:

1) You must be in either Day or Week view.

2) The Contact Manager Event must be assigned to an Event Status that the 'Remind Me' turned on.

3) The Contact Manager Event must be assigned to an employee.

4) The employee must be the same employee that is the Crew Leader of a crew visible in *My Calendar*.

Note: The Contact Manager Events will always appear as a 30 minute appointment.

9.6 Setting up Alerts to appear when a service is scheduled

Alerts can be set to contact events so that a screen appears when a new service is being scheduled for that customer. This is especially useful if you want to flag the customer as someone you no longer want to provide service to (such as a slow payer or a 'difficult' customer), or for more positive reasons such as reminding for upsells, or when customers have specific needs, you can make an event that will prompt you to ask about those needs.

To set and test an alert for a customer:

1) Click **Lists > Contact Manager**.

2) Choose an existing event and click **Edit Event**, or click **New Event**.

3) Fill out the fields as necessary, making sure *Customer*, *Type* and *Status* are entered.

4) Place a check in the "Alert: This event is raised when a new service is scheduled for this customer?" checkbox.

5) Schedule a new service in *My Calendar*, making sure that the same customer is chosen. When you click **OK** you'll get an alert showing all the contact events for that customer that have an alert specified.

CHAPTER 10
REPORTING

This section explains how to generate the reports that you need to make your business decisions. QXpress gives you two options when it comes to reporting: first, you can design your own report using the Template Designer features (if using the QXpress Platinum or QXpress Enterprise version); second, you can take advantage of QXpress' pre-existing reports. Either way, you will be able to extract the information that you need to make your business decisions.

The topics discussed in this chapter are:

- 10.1 Using the Template Designer
- 10.2 Viewing pre-existing job costing reports
- 10.3 Viewing pre-existing planning & analysis reports
- 10.4 Creating lists
- 10.5 My Calendar summary

10.1 Using the Template Designer

The Template Designer provides you with the maximum ability to design the exact report that you need. You can create virtually any report, share report templates with other users, and download report templates from a library of hundreds of existing QXpress report templates. To learn more about the Template Designer, consult the Template Designer Manual that was either included with the installation of the software or found at www.qxpress.com, under the Support > Documentation menu.

The Template Designer for reports, can be found under the Reports: Template Designer:Reports menu.

10.2 Viewing pre-existing job costing reports

Job costing reports provide a summary of all revenues and costs that have been entered into the program. These revenues and costs are broken down in a variety of ways to highlight the profitability of your customers, crews and services.

10.2.1 By customer

This report shows the profitability of your individual customers. Double-clicking on a customer's name will display all of the unique services that were completed for the customer. Then, double-clicking on one of the services will display the profitability breakdown for each time you visited the customer's job site, for that service.

To view this report:

1) Click **Reports > Job Costing > By Customer**.

2) The *Reports Detail Selector* screen will appear.

3) Section 1 of this screen displays the date range that you want to view. Enter the period that you want to view by clicking on the drop-down list and using the calendar to enter the appropriate dates.

4) Section 2 of this screen indicates the customers that you want to include in the report.

   If you want to view all customers, click on *All Customers*. Click **OK**.

   If you want to view information for a specific customer, click on *By Individual*. Click on the drop-down list in the *Choose Individual* box and select the appropriate customer. Click **OK**.

   If you want to select a list of individuals to include in the report, click on *Quick Pick*. Click **OK**. The *Generate Invoices* screen will appear. Place a check in the boxes corresponding to the customers that you want to include in the report. Click **Next**.

10.2.2 By crew

This report shows the profitability of your individual crews. Double-clicking on a crew name will display every job type that the crew has performed and how profitable those services have been.

To view a Job Costing By Crew report:

1) Click **Reports > Job Costing > By Crew**.

2) The *Reports Detail Selector* screen will appear.

3) Section 1 of this screen displays the date range that you want to view. Enter the period that you want to view by clicking on the drop-down list and using the calendar to enter the appropriate dates.

4) Section 2 of this screen indicates the customers that you want to include in the report.

If you want to view all customers, click on *All Customers*. Click **OK**.

If you want to view information for a specific customer, click on *By Individual*. Click on the drop-down list in the *Choose Individual* box and select the appropriate customer. Click **OK**.

If you want to select a list of individuals to include in the report, click on *Quick Pick*. Click **OK**. The *Quick Pick* screen will appear. Place a check in the boxes corresponding to the customers that you want to include in the report. Click **Next**.

Place a check in the boxes corresponding to the clients that you want to include in the report. Click **Next**.

10.2.3 By job description, by customer

This report displays your profitability broken down by the services you provide. Double-clicking on one of the services will display every customer that ordered that service. Then, double-clicking on any of the customers will display the profitability of each time you visited their job site to perform that service.

To view this report:

1) Click **Reports > Job Costing > By Job Description, By Customer**.

2) The *Reports Detail Selector* screen will appear.

3) Section 1 of this screen displays the date range that you want to view. Enter the period that you want to view by clicking on the drop-down list and using the calendar to enter the appropriate dates.

4) Section 2 of this screen indicates the customers that you want to include in the report.

If you want to view all customers, click on *All Customers*. Click **OK**.

If you want to view information for a specific customer, click on *By Individual*. Click on the drop-down list in the *Choose Individual* box and select the appropriate customer. Click **OK**.

If you want to select a list of individuals to include in the report, click on *Quick Pick*. Click **OK**. The *Quick Pick* screen will appear. Place a check in the boxes corresponding to the customers that you want to include in the report. Click **Next**.

10.2.4 By job description

This report displays the profitability of each type of service that you provide. Double-clicking on any of the services will display each day that type of service was completed and the profitability of the service on those days.

To view this report:

1) Click **Reports > Job Costing > By Job Description**.

2) The *Reports Detail Selector* screen will appear.

3) Section 1 of this screen displays the date range that you want to view. Enter the period that you want to view by clicking on the drop-down list and using the calendar to enter the appropriate dates.

4) Section 2 of this screen indicates the customers that you want to include in the report.

   If you want to view all customers, click on *All Customers*. Click **OK**.

   If you want to view information for a specific customer, click on *By Individual*. Click on the drop-down list in the *Choose Individual* box and select the appropriate customer. Click **OK**.

   If you want to select a list of individuals to include in the report, click on *Quick Pick*. Click **OK**. The *Quick Pick* screen will appear. Place a check in the boxes corresponding to the customers that you want to include in the report. Click **Next**.

10.2.5 By type

This report shows your total costs broken down into the amount spent on labor, material, and subcontractors. Double-clicking on one of the cost types will display how much of that cost was spent on each type of service you provide.

To view this report:

1) Click **Reports > Job Costing > By Type**.

2) The *Reports Detail Selector* screen will appear.

3) Section 1 of this screen displays the date range that you want to view. Enter the period that you want to view by clicking on the drop-down list and using the calendar to enter the appropriate dates.

4) Section 2 of this screen indicates the customers that you want to include in the report.

If you want to view all customers, click on *All Customers*. Click **OK**.

If you want to view information for a specific customer, click on *By Individual*. Click on the drop-down list in the *Choose Individual* box and select the appropriate customer. Click **OK**.

If you want to select a list of individuals to include in the report, click on *Quick Pick*. Click **OK**. The *Generate Invoices* screen will appear. Place a check in the boxes corresponding to the customers that you want to include in the report. Click **Next**.

10.2.6 Estimated vs. actual hours

This report displays the difference between the estimated hours required to complete services and the actual hours required to complete services. Each customer is shown with the total estimated hours for their work and the total actual hours for their work. Double-clicking on a customer will display all of the unique services that were completed for the customer and the estimated and actual hours for each services. Then, double-clicking on a service will display the date that every visit for the service was completed and the estimated and actual hours for each time you visited the job site.

To view this report:

1) Click **Reports > Job Costing > Estimated Vs. Actual Hours**.

2) The *Reports Detail Selector* screen will appear.

3) Section 1 of this screen displays the date range that you want to view. Enter the period that you want to view by clicking on the drop-down list and using the calendar to enter the appropriate dates.

4) Section 2 of this screen indicates the customers that you want to include in the report.

If you want to view all customers, click on *All Customers*. Click **OK**.

If you want to view information for a specific customer, click on *By Individual*. Click on the drop-down list in the *Choose Individual* box and select the appropriate customer. Click **OK**.

If you want to select a list of individuals to include in the report, click on *Quick Pick*. Click **OK**. The *Quick Pick* screen will appear. Place a check in the boxes corresponding to the customers that you want to include in the report. Click **Next**.

10.2.7 Equipment usage

This report displays the overhead costs for each piece of equipment. This report displays the cost per mile and the cost per hour for each piece of equipment.

To view this report:

1) Click **Reports > Job Costing > Equipment Overhead Rate**.

2) Indicate whether you would like to see the information grouped by year, quarter or month by clicking on the appropriate selection.

3) Click **OK**.

10.3 Viewing pre-existing planning & analysis reports

Planning & analysis reports display information that is important for your future planning. Each type of planning & analysis report is described below.

10.3.1 Gross status report

This report displays the expected revenue you will earn, the expected square footage that you will service and the total count of jobs that have been scheduled for a given period of time. Double-clicking on the year in the left- hand column will provide a breakdown of all the unique services that have been ordered for that year. Then, double-clicking on any of the services will provide a breakdown of all those services based on their status.

To view this report:

1) Click **Reports > Planning and Analysis > Gross Status**.

10.3.2 Job schedule planning report

For each service, this report will display the total count, man-hours, day-hours and square footage that has been scheduled for a given period.

Double-clicking on any of the dates shown on the left-hand side of the report will display the total count, man-hours, day-hours and square footage that has been scheduled for each crew.

To view this report:

1) Click **Reports > Planning and Analysis >Job Schedule Planning**.

2) The *Reports Detail Selector* screen will appear.

3) Section 1 of this screen displays the date range that you want to view. Enter the period that you want to view by clicking on the drop-down list and using the calendar to enter the appropriate dates.

4) Section 2 of this screen indicates the customers that you want to include in the report.

   If you want to view all customers, click on *All Customers*. Click **OK**.

   If you want to view information for a specific customer, click on *By Individual*. Click on the drop-down list in the *Choose Individual* box and select the appropriate customer. Click **OK**.

   If you want to select a list of individuals to include in the report, click on *Quick Pick*. Click **OK**. The *Generate Invoices* screen will appear. Place a check in the boxes corresponding to the customers that you want to include in the report. Click **Next**.

10.3.3 Job assignment listing

This report displays every service and, beneath each service, every customer that is scheduled to receive that service.

To view this report:

1) Click **Reports > Planning & Analysis > Job Assignment Listing**.

2) The *Job Assignment Report* screen will appear.

3) Section 1 of this screen displays the clients that you want to include on the report. Indicate the clients that will be included in the report by clicking on the drop-down list and selecting the appropriate option.

4) The *Which jobs should be shown* section of this screen indicates the job information that you want to be included in the report.

   If you want the report to include every job scheduled for a customer, click on **All Jobs**.

   If you want the report to include only one specific job description, click on **Specific Job**. Click on the drop-down list in the box provided and select the appropriate **Job Description**.

   If you want the prices of each *Job Description* to be shown in the report, place a check in the *Print Price?* box.

   If you want the job site to be shown in the report, place a check in the *Print Job Site?* box.

5) The *Choose the Status that Should be Shown* section of the screen indicates which job statuses you would like shown in the report. For example, if you want both *Active* and *Cancelled* jobs to be shown, place a check in both the *Active* and *Cancelled* boxes.

6) Click **OK**.

10.3.4 Apps per customer

This report displays all services - that have job kind not set to ‘Other’ (under Lists > Charge Description List) - that have been ordered by each customer. This report also displays the customer’s job site, phone number, zone, square footage, map code, status and price per service.

To view this report:

1) Click **Reports > Planning & Analysis > Apps Per Customer**.

2) Answer **Yes** or **No** to the prompt.

10.3.5 Zone summary

This report displays every customer, the total count of services and the total square footage that will be serviced in each zone.

To create this report:

1) Click **Reports > Planning & Analysis > Zone Summary**.

2) Answer **Yes** or **No** to the prompt.

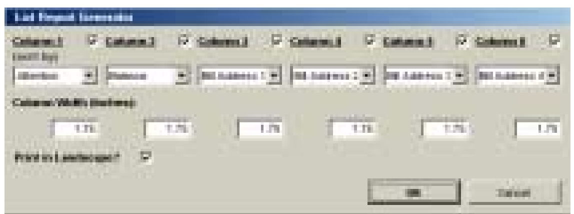
10.4 Creating lists

This report allows you to generate a customized list of customers. This list can display the information that you want in the order that you specify.

To create a list report:

1) Click **Reports > Lists**.

2) The *List* screen will appear.



3) The *Columns* section of the screen indicates the information that you want to include in the report. Select the information by clicking on the drop-down list in each column and choosing the appropriate option. If you do not want a column to be included in the report, remove the check from the checkbox corresponding to the column.

4) The *Column Width* section of the screen indicates how wide you want each column to be. Enter the width into the boxes by typing the appropriate number.

5) Click **OK**.

10.5 My Calendar summary

This report summarizes the information shown in My Calendar for a specific date range, grouped by day, status and crew. For example, if the date at the top of My Calendar is *June 1, 2005*, the My Calendar summary report will display the number of feet serviced, total revenue, total costs and total profit for *June 1, 2005*. The information is shown on a per crew basis. This means that along the left-hand side of the report each crew is listed. Double-clicking on one of the crews will provide a breakdown of every service the crew performed on *June 1, 2005* and the revenue and costs associated with each service.

To view a My Calendar summary report:

1) Click **Reports > My Calendar Summary**.

CHAPTER 11
TOOLS

This chapter explains all of the features found under the **Tools** menu in QXpress.

The topics discussed in this chapter are:

- 11.1 Create mail merge
- 11.2 Fee schedule
- 11.3 Job rate card
- 11.4 Restoring an earlier database

11.1 Create mail merge

Mail merge provides you with the ability to export information from QXpress into Microsoft®Word. This means that you can create document templates in Microsoft®Word and then merge those templates with information from QXpress. The result is a quick and easy way to generate company documents, such as renewal letters or welcome letters.

To learn more about using mail merge, consult the mail merge manual available online at http://www.alocet.com/support/index.html.

It should be noted that the *preferred* way to generate renewal letters, estimates, and other documents is with the Template Designer:Reports feature.

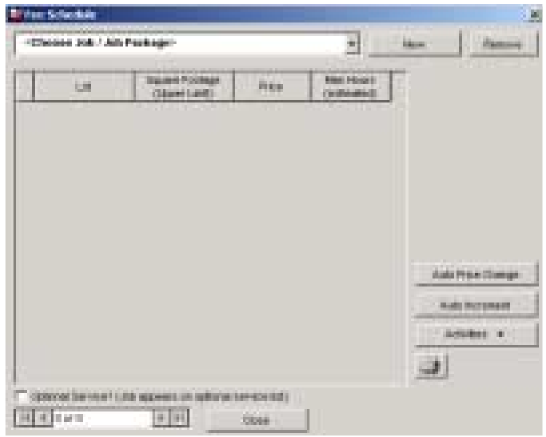
11.2 Fee schedule

Fee schedules automatically insert prices for services based on square footage. When a service is added to a customer's account, the fee schedule looks at the property size of the customer and assigns the associated price. This is a feature used mostly by lawn spraying companies.

To add a new fee schedule:

1) Click **Tools > Fee Schedule**.

2) The *Fee Schedule* screen will appear.



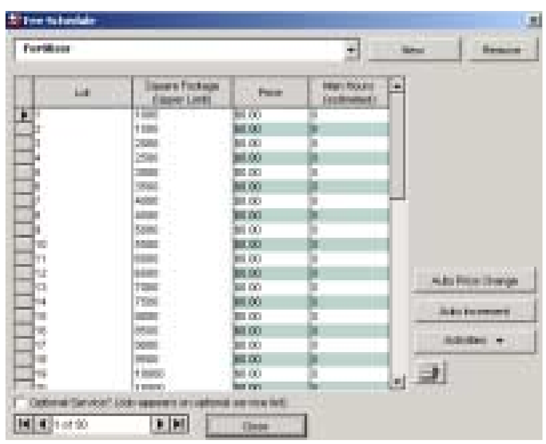
3) Click **New.**

4) A new screen will appear.

5) The *Choose which description you would like to add* box indicates the charge description that you want to add a fee schedule for. Select the charge description by clicking on the drop-down list and choosing the appropriate option.

6) Click **OK**.

7) A new screen will appear.



8) For each lot enter the appropriate square footage, price and man-hours. For example, if your first pricing category is from 0-1000 square feet, enter *1000* into the *Square Footage* column corresponding to lot 1. Similarly, if your price for 0-1000 square feet is $12, enter *12* into the *Price* column corresponding to lot 1. And if takes you 15 minutes to service 0-1000 square feet, enter*.25* into the *Man Hours (estimated)* column associated with lot 1.

9) Now whenever you add a service with the same description as the fee schedule, QXpress will automatically look to see if you have made an entry for the customer's property square footage. If you have, the appropriate price will be automatically entered. If you have not, no price will be entered.

10) Click **Close (Esc)** to save the information and return to the previous screen.

To copy an existing fee schedule:

1) Click **Tools > Fee Schedule**.

2) The *Fee Schedule* screen will appear.

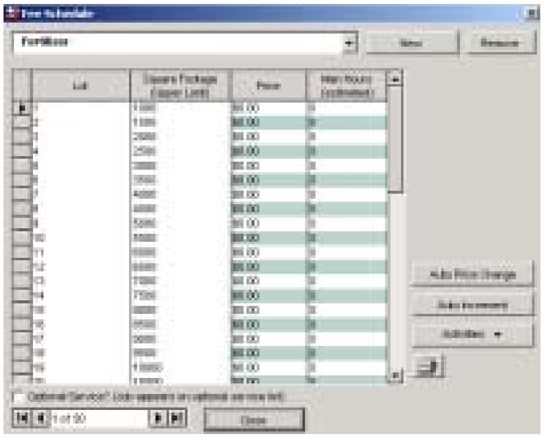
3) Click **New.**

4) A new screen will appear.

5) The *Choose which description you would like to add* box displays the job description that you want to add a fee schedule for. Select the job description by clicking on the drop-down list and choosing the appropriate option.

6) Click **OK**.

7) A new screen will appear.



8) Click **Activities > Copy fee schedule from existing...**

9) Answer **Yes** to the prompt.

10) Type the name of the fee schedule that you are copying into the box provided. It must be exact and is case-sensitive.

11) Click **OK**.

12) Click **Close (Esc)** to save the information and return to the previous screen.

To rename a fee schedule:

1) Click **Tools > Fee Schedule**.

2) The *Fee Schedule* screen will appear.

3) Click on the drop-down list at the top of the screen and select the fee schedule that you want to edit.

4) The fee schedule will appear on the screen.

5) Click **Activities > Rename**.

6) Enter the new name into the box provided.

7) Click **OK**.

8) Click **Close (Esc)** to save the information and return to the previous screen.

To edit a fee schedule:

1) Click **Tools > Fee Schedule**.

2) The *Fee Schedule* screen will appear.

3) Click on the drop-down list at the top of the screen and select the fee schedule that you want to edit.

4) The fee schedule will appear on the screen.

5) Edit the information as required.

6) Click **Close (Esc)** to save the information and return to the previous screen.

To delete a fee schedule:

1) Click **Tools > Fee Schedule**.

2) The *Fee Schedule* screen will appear.

3) Click on the drop-down list at the top of the screen and select the fee schedule that you want to delete.

4) Click **Remove**.

5) Answer **Yes** to the prompt.

6) Click **Close (Esc)** to save the information and return to the previous screen.

11.3 Job rate card

This tool provides a quick and easy way for you to change the price of services from one year to the next. This tool enables you to increase / decrease prices by a flat rate or by a percentage.

To increase/decrease job prices by a fixed amount:

1) Click **Tools > Job Rate Card**.

2) The *Job Rate Card* screen will appear.

3) Highlight the services that you want to increase the price of.

4) Click **Change Selected Jobs**.

5) The *Job Rate Change* screen will appear.

6) In the *Type of Change* section of the screen click on *Change selected job rate by a fixed amount*.

7) In the *Fixed Change* section of the screen click on *Increase*/*Decrease*.

8) Type the amount of the increase/decrease into the box provided.

9) Click **Change Rate**.

10) Click **Close** to save the information and return to the previous screen.

To increase/decrease job prices by a percentage:

1) Click **Tools > Job Rate Card**.

2) The *Job Rate Card* screen will appear.

3) Highlight the services that you want to increase the price of.

4) Click **Change Selected Jobs**.

5) The *Job Rate Change* screen will appear.

6) In the *Type of Change* section of the screen click on *Change selected job rate by a percentage*.

7) In the *Percentage Change* section of the screen click on *Increase*/*Decrease*.

8) The *To the Closest* box indicates the how you want to round decimals that result from the percentage increase. Select your rounding preference by clicking on the drop-down list and choosing the appropriate option.

9) The *Rounding* box indicates whether you want to round the price up or down. Select your preference by clicking on the drop-down list and choosing the appropriate option.

10) The *Percentage* box displays the percentage increase / decrease that you want to make. For example, if you want to increase / decrease the price of the jobs by 10% enter *10* into the box. Enter the appropriate percentage by typing it into the box.

11) Click **Change Rate**.

12) Click **Close** to save the information and return to the previous screen.

Note: If you want to set a standard fixed price for a number of services that have various prices, there is a short cut. Click on the Job column heading to sort the services, then highlight the services, and click **Change Selected Jobs**. Next choose to decrease the services by a fixed amount of 99999. When you click Change Rate it will lower all the prices to $0 since this is the minimum number. Next click **Change Selected Jobs** again and increase the same jobs by your desired standard fixed price.

11.4 Restoring an earlier database

This tool enables you to restore a previous “silent” backup of your database. This tool is used in a situation where you have not done your own backup and you want to go back to the most recent backup that QXpress made automatically.

To restore an earlier database:

1) In the QXpress Login Form, click **File > Restore my database to an earlier time...**

2) The *Restore my database to an earlier time* screen will appear:

3) Choose a restore point.

4) Click **OK**.

5) Answer **Yes** to the prompt.

6) At this point you will be required to save your current database. To do this, enter a name for the file into the *File name* box and click **Save**.

7) Click **OK**.

8) Click **OK**.

9) Open QXpress as usual. You will be opening the restored database.

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