

# QXPRESS VERSION 4.0 FEATURE LIST

This document lists every new feature included in QXpress version 4.0. For every feature listed, there is also a description of the feature and step-by-step instructions explaining how to use the feature.

## 1. Custom fields at the service level

Versions: QXpress Gold, QXpress Platinum

In addition to the 150 custom fields already available on a per customer basis, you now have 15 fields available on a per service level. The 15 custom fields have pre-defined types: there are 3 date fields, 4 drop-down list fields, 4 numeric fields, and 4 character fields. The drop-down lists have the added capability of adding your own icons.

Common uses will be to track “Date Entered”, “Date Promised”, “Priority” and “Dispatch status”.

### To edit custom fields at the service level:

- 1) In *My Calendar*, click **Schedule > New**.
- 2) Choose a *Type*, *Charge Description*, *customer*, and click **OK**.
- 3) Click on the *Edit Custom Fields...* tab.
- 4) Place a check under the *Show?* column of the fields you want to show.
- 5) Enter a new name for your field under the *Field name* column.
- 6) Click on the *Custom Fields* tab to see and use the new fields you have created.

### To create your own ‘Priority’ drop-down list:

- 1) Click on the *Edit Custom Fields...* tab of an existing service.
- 2) The first field by default is likely ‘Userdropdown1’. Under the *Field name* column, change the name of this field to ‘Priority’.

- 3) Place a check under the *Show?* column of the 'Priority' field.
- 4) Under the *Dropdown List Values* grid, click **Add item**.
- 5) Under the *Item* column, type: '1 - High Priority'.
- 6) Under the *Icon* column, click (...).
- 7) Click on an icon that you will use to represent a high priority service.
- 8) Under the *Dropdown List Values* grid, click **Add item**.
- 9) Under the *Item* column, type: '2 - Low Priority'.
- 10) Under the *Icon* column, click (...).
- 11) Click on an icon that you will use to represent a low priority service.
- 12) Click on the *Custom Fields* tab, and select '1 - High Priority' from the *Priority* drop-down list.

### **Setting the 'Priority' custom field to be visible in the 'Day View' calendar:**

- 1) In *My Calendar*, set the *View* drop-down list to be 'Day'.
- 2) Click **View > Day view options...**
- 3) Change the *Line 5* drop-down list to be 'Priority'.
- 4) Click **OK**.
- 5) Notice how any service you set a priority for now has the priority icon and text displayed in the Day View of *My Calendar*.

## **2. Waiting List for dispatchers**

Versions: All

QXpress users in the plumbing, irrigation, HVAC, and repair business require features that pertain to 'dispatching'. When service calls come in, they are first added to the Waiting List. At a later time, the service calls in the Waiting List are sorted, and 'dispatched' to the appropriate crew in My Calendar.

### To make sure the Waiting List is activated:

- 1) Go to **Edit > Preferences**.
- 2) Click on the *Day View* tab.
- 3) Put a check in the *Show Waiting List* checkbox.
- 4) Click **OK**.

### To add a service to the Waiting List:

- 1) In *My Calendar* ensure that 'Day' is selected from *View* drop-down list.
- 2) Click **Waiting List > New**.
- 3) For the *Type* drop-down list, choose 'One time / appointment'. You may also choose a Zone-Based service, or a Project, but 'One time / appointment' is most common. Recurring services and billing installments cannot be placed in the Waiting List.
- 4) Choose a *Charge description*, a *customer* and click **OK**.
- 5) In the service screen, enter any relevant details, and click **OK**. You will now see this service listed in the Waiting List.

### To 'dispatch' a service from the Waiting List to the Day View:

- 1) In *My Calendar* ensure that 'Day' is selected from *View* drop-down list.
- 2) In the *Waiting List* grid, locate the service you would like to dispatch.
- 3) Under the *Drag* column, click on the drag icon of the service you would like to dispatch, and while holding down your left mouse button, drag the service to the time, date, and crew you would like to dispatch the job to.

### To place a scheduled service back into the Waiting List:

- 1) In *My Calendar* ensure that 'Day' is selected from the *View* drop-down list.
- 2) Right-click on the service you would like to place back in the Waiting List, and choose 'Place in Waiting List'. Only services of the type 'One time / appointment', 'Zone-Based service' and 'Project' can be placed in the Waiting List. Services that have already been invoiced cannot be placed in the Waiting List.

### To change Waiting List sorting, and columns:

- 1) In *My Calendar*, click **Waiting List > Show, hide & sort columns...** .
- 2) Put a check under the *Show?* column of the fields you want to show in the Waiting List.
- 3) The services in the Waiting List automatically sort by the order of the columns listed here. For example, if you wanted the services in the Waiting List to first sort by the Service charge description, and then by Zip Code, you would make sure that 'Service' was the first column listed, and then Zip Code was the second column listed. To move the positions of columns up and down click either **Move Up** or **Move Down**.
- 4) Click **OK**.

## 3. Work Order Numbers

Versions: All

Work Order numbers are assigned automatically by QXpress for every service that you add. A Work Order number allows you to easily locate a specific service in My Calendar.

### To make sure Work Order numbering is activated:

- 1) Click **Edit > Preferences**.
- 2) Click on the *Routing & Scheduling* tab.
- 3) Put a check in the *Use Work Order numbering* checkbox.
- 4) Click **OK**.
- 5) In *My Calendar*, click **Refresh**. This will add the *Work Order #* column in *My Calendar's* List View, and the *WO #* column in the *Customer* screen.

### To find a service by its Work Order #

- 1) In *My Calendar*, change the From and To dates to include the date range the service is scheduled in.
- 2) Click **Refresh**.
- 3) Click **Schedule > Find**.

- 4) For the *Choose Field* drop-down list, select 'Work Order #'.
- 5) In the *Search for text containing* box, enter the Work Order # you are searching for, and click **Search**.

#### **To make the Work Order # visible in Day View.**

- 1) In *My Calendar*, set the *View* drop-down list to be 'Day'.
- 2) Click **View > Day view options...**
- 3) Change the *Line 5* drop-down list to be 'Work Order #'.
- 4) Click **OK**.
- 5) Notice how services displayed in the Day View of *My Calendar* now have 'WO#:' listed on the 5th line.

## **4. Crew Groups**

Versions: All

Crew Groups allow you added flexibility beyond just seeing one crew or all crews in *My Calendar*. For example, imagine you have two divisions: the install division and the repair division. Crew Groups will allow you to view only the services assigned to crews in the install division.

#### **To create a new Crew Group:**

- 1) Click **Lists > Crews**.
- 2) Click on the *Setup Crew Groups* tab.
- 3) Click **New Crew Group**.
- 4) For the name of the Crew Group, type: 'Install Crews'.
- 5) Click **Add Crew**.
- 6) Under the *Crew* column, select an existing crew that belongs to the Crew Group.
- 7) Click **Add Crew** for other crews that belong to this Crew Group.
- 8) Click **OK**.

### **To show services belonging to a Crew Group in My Calendar:**

- 1) In *My Calendar*, select the desired Crew Group from the *Crew* drop-down list. Only services belonging to crews in the selected Crew Group will show.

### **To limit Login Users to only see services belonging to specific crews:**

- 1) Read the section '5. Login User access permissions'.
- 2) Setup a new Login User.
- 3) In the setting up of a Login User, under the section 'Limit Crew Groups', select the Crew Groups this Login User can have access to. When this Login User logs into QXpress, *My Calendar* will only show the services pertaining to their assigned Crew Groups.

## **5. Login User access permissions**

Versions: QXpress Platinum only

Login permissions allow you to limit who can access QXpress, and what features they can access.

### **To set the Admin password:**

- 1) Click **Edit > Preferences**.
- 2) Click the *Login Permissions* tab.
- 3) Click on the 'Admin' Login User.
- 4) Click **Edit User...**
- 5) Enter the Password, and confirmation. Make sure you remember the Admin password.
- 6) Click **Finish**.

### **To add new Login Users:**

- 1) Click **Edit > Preferences**.
- 2) Click the *Login Permissions* tab.

- 3) Click **Add User...** .
- 4) If this Login User exists in QuickBooks as an employee, select them from the *QuickBooks employee (optional)* drop-down list. This will enable them to be selected in the Contact Manager, and have events / reminders assigned to them.
- 5) Enter the Login, Password, confirmation, and click **Next**.
- 6) For each option, select either 'No Access' or 'Access' and click **Next**. If the permissions you want to set for this Login User are the same as a Login User you have already setup, click **Copy From...** .
- 7) When you have finished setting permissions, click **Finish**.
- 8) Click **OK**.

#### **To open QXpress with Login User permissions:**

- 1) If QXpress is already open, click **File > Logoff / Login**, otherwise open QXpress by double-clicking on the QXpress icon on your Desktop.
- 2) Enter the Login and Login Password, and click **Start**.

## **6. 'Cust' View**

Versions: All

In *My Calendar* the 'Cust' view is similar to the 'Day' view, but unlike the 'Day' view, you can see customers displayed in the left margin, dates in the top margin, and services below. The 'Cust' view is useful for looking at what services are scheduled for specific customers. This is useful for QXpress users who schedule multiple services for customers per week, or those who schedule projects.

#### **To use 'Cust' view:**

- 1) In *My Calendar*, change the *View* drop-down list to 'Cust'.
- 2) In the *Select customers for 'Cust' view* screen, select the customers you would like to see in the 'Cust' view. Please note that there is a 500 customer limit to the 'Cust' view, for performance reasons. If you would like to use the 'Cust' view and you have a customer list greater than 500 customers, use Memorized Filtered Lists to have QXpress automatically pick the customers you want to see.

## Possible Use: Showing only customers with active projects

If you schedule multi-day projects you may find a great use for the 'Cust' View. You will be able to get an overview of all customers who currently have active projects On Route.

- 1) Read section 4 'Crew Groups'.
- 2) Setup a Crew Group that lists only your install crews. Call this Crew Group 'Install crews'.
- 3) Create a Charge description called 'Install Project', under **Lists > Charge Description List**.
- 4) Schedule a new 'Install Project'. Make sure you assign it to one of your install crews.
- 5) Change the status of the Install Project to be 'On Route'.
- 6) Click **Lists > Customer List**.
- 7) Click the *Find* tab.
- 8) Click the *Job Information* tab.
- 9) For the *Job Description* drop-down list, select 'Install Project'.
- 10) For the *Job Status* drop-down list, select 'On Route'.
- 11) Click **Filter**.
- 12) Click the *Memorized Filter List* tab.
- 13) Click **Save As Memorized Filter**.
- 14) For the name of the Memorized Filter List, type: 'Active Install Projects' and click **OK**.
- 15) In *My Calendar*, select your date range to include the service you scheduled, plus the next 7 days, and click **Refresh**.
- 16) For the *View* drop-down list, choose 'Cust'.
- 17) Select the *Memorized Filter List* option, choose 'Active Install Projects' and click **OK**.
- 18) In *My Calendar*, for the *Crew* drop-down list, choose the Crew Group: 'Install crews'. Now all the install services scheduled for the install crews are listed in My Calendar, giving you a good overview of your schedule.

## 7. Extend Contract (a.k.a. 'Charge Over Max')

Versions: All

If you schedule recurring services, you may stipulate the maximum number of visits covered by a contract. If you need to schedule services beyond the maximum number of visits, a price per visit will be charged over and beyond the monthly billing installments.

As you complete services throughout the season, QXpress keeps track of the 'Done To Date'. Once the 'Done To Date' hits the maximum number of visits, QXpress will not schedule additional services. However, if you use the Extend Contract feature, you can be automatically prompted when you start QXpress to extend these contacts on a price per visit basis.

### To ensure the 'Extend Contract' feature is activated:

- 1) Click **Edit > Preferences**.
- 2) Click on the *Routing & Scheduling* tab.
- 3) Ensure there is a check in the *Extend Contracts: warn at startup when 'Done To Date' = 'Max Visits'?* checkbox.
- 4) Click **OK**.

### To extend a contract:

- 1) To try this feature, make sure you have at least one service where (i) the type is Recurring; (ii) it is marked 'Under Contract' under the *General* tab; (iii) your predetermined 'Charge over max' amount (price per visit) is entered in the *Rate / Price* box, (iv) the 'Done to date' is equal to or greater than the 'Maximum # of visits' under the *Recurring Dates* tab.
- 2) Click **File > Logoff / Login**.
- 3) Click **Start**.
- 4) During the startup procedure, you'll now get a prompt screen with the caption *'Done To Date'='Max Visits'*.
- 5) Click **OK**, and QXpress will automatically create the new service for the customer. The previous service will be given the status 'Needs Renewal' so that it is available again next year.

## 8. Add QuickBooks Items from QXpress

Versions: All

In addition to adding new customers, invoices and service times from QXpress into QuickBooks, you can now add Items as well. This should mean that you'll have to Get QB Data less often, and it will no longer be an inconvenience when you have multiple users already logged into QXpress and you need to add a new Item.

### To add a QuickBooks Item from QXpress:

- 1) Make sure QuickBooks is open to the correct QuickBooks company.
- 2) In QXpress, click **Lists > Charge Description List**.
- 3) Click **New**.
- 4) Under the *Item* column, select '--New Item--'.
- 5) From the *Type* drop-down list, choose the type of Item you want to add.
- 6) Fill out all fields the way you would if you were adding the Item in QuickBooks.
- 7) Click **OK**.

## 9. Find customer icon when adding new service

Versions: All

QXpress users with large customer lists can find it difficult to do find a customer by their last name when adding a new service. Using the Find customer icon feature, you can now use the *Customer* screen's search capabilities when adding a new service.

### To use the Find customer icon when adding a new service:

- 1) In *My Calendar*, click **Schedule > New**.
- 2) Beside the *For customer* drop-down list, there is a new button to the right with an icon of a magnifying glass. This is the Find Customer icon. Click this button.

- 3) Search for the customer you want to find.
- 4) Click on the customer you want to schedule a service for.
- 5) Click **Close**. The *For customer* drop-down list will now show the customer you selected.

## 10. Group Service Times

Versions: QXpress Gold, QXpress Platinum

If you service several properties together at the same time, you may find it difficult to record the exact time individually for each property. You may find it easier to just record the total time the crew took to service all properties. Using the Group Service Times feature you easily distribute the total time spent on all properties to the individual times on each property. The proportion of the total time that will be assigned to a property will be in the same proportion as the estimated times allocated to that property to the total estimated times for all properties.

### To group service times:

- 1) In *My Calendar* schedule several services, and put them all On Route.
- 2) Make sure each of the scheduled services have an estimated time entered in the *Job Items* tab.
- 3) Click **Activities > Job Cost Timesheet**.
- 4) Highlight the services that you to include in the Group Service Times. If you are unfamiliar with how to highlight, hold down the CTRL key on your keyboard, and click on the margin of each service you want highlighted.
- 5) Click **Activities > Distribute times to selected services...**
- 6) Enter the Start and Stop times for the group.
- 7) Click **OK**.

## 11. Restore my database to an earlier time

Versions: All

This feature will allow you to restore your database back to the day before, or the last time QXpress did its own silent backup. Whenever QXpress closes, it will check to see how long your session was, and whether or not other users are still connected to the database. If QXpress determines you are the only user connected to the database, and your session has lasted longer than 30 minutes, a silent backup will be made on your hard drive. QXpress will only store up to 2 of these silent backups, and will only create one per day. This does not replace your need to make daily backups on your own. Your hard drive may fail at any time.

#### **To restore a database to an earlier time:**

- 1) In the QXpress Login Form, click **File > Restore my database to an earlier time...** . If this option is disabled, QXpress has not yet made a silent backup to restore, so you will be unable to restore the database at this time.
- 2) Choose a restore point. You may have either one or two restore points to choose from.
- 3) Click **OK**.
- 4) QXpress will require you to make a backup of your current database, just in case you want to go back to it. Enter a meaningful name for this backup, and click **Save**. After clicking **OK** to the two messages that appear, you will return to the Login Form. When you click **Start** you will be entering your restored database.

## **12. Routing options for Pool, Janitorial & Sweeping companies**

Versions: All

Companies that service the same properties several times per week, do not always perform the work with the same crew, and in the same order each day of the week. For example, you may have a customer who gets serviced 1st on Monday by Crew 001, 5th on Wednesday by Crew 023, and 10th on Friday by Crew 004. QXpress version 4.0 has new features to make this type of scheduling possible.

#### **To ensure the 'Route by Weekday Sort Codes' feature is activated:**

- 1) Click **Edit > Preferences**.
- 2) Click on the *Routing & Scheduling* tab.

- 3) Ensure there is a check in the *Route by Weekday Sort Codes* checkbox.
- 4) Click **OK**.

### **To set a different crew for a different day of the week:**

- 1) Add a new recurring service.
- 2) In the *Recurring Dates* tab, make sure the Basis is 'Other Intervals', and the *Minimum days between visits* is 1.
- 3) Under the *Intervals* tab make sure it is scheduled for every 1 day(s).
- 4) Under the *Allow* tab, in the *Which Days?* frame, click *Choose*.
- 5) Notice how your default crew is visible for each day of the week. Make sure there is a checkbox in only 'Mon', 'Wed' and 'Fri'. Change the crews for these days so that there is a different crew for each of the three days.
- 6) Click **Generate Dates**.
- 7) Click **OK**, and return to *My Calendar* to view the changes.

### **To set a different Sort Code for each day of the week:**

- 1) In *My Calendar*, show only the Crew you want to set the Sort Code (order) for.
- 2) In *My Calendar*, show only one day of the week.
- 3) In *My Calendar*, make sure the *View* drop-down list is set to 'List'.
- 4) Make sure that you have a *Sort Code* column. If you do not, click **View > Schedule By Time**, to ensure that 'Schedule By Time' is unchecked.
- 5) In the *Sort Code* column, number the properties in the order that you want to do them. Click **Refresh** whenever you wish to re-sort the list.
- 6) Use **Activities > Sorting > Reindex Sort Code By Current View** to space the services by 10, making it easy to place a service in between another two. TIP: We recommend using this feature to help you start numbering Monday's services from 10000, Tuesday's services from 20000, Wednesday's services from 30000, and so on. This way, if services have to be rescheduled, the previous day's work will appear at the top of the list.
- 7) When you are finished setting your order, click **Activities > Sorting > Save the sort codes for this day and crew...** (if this option is not

available, make sure *Route by Weekday Sort Codes* is checked under **Edit > Preferences**).

- 8) QXpress has now saved that order for every week. You can scroll to the same day for the same crew next week and you will see the order has been set.

## 13. Changes to QX Mapping

Versions: All

QX Mapping has two main feature improvements in QXpress version 4.0. The first is that the generated map is now embedded directly into *My Calendar*, instead of in a separate screen. This makes it easy to regenerate the map after making small changes in *My Calendar*. The second change is that estimated hours of a service are now incorporated into the day length of the directions in the map. So if a three person crew is working on a 1 man hour service, QX Mapping will show a stay time of 20 minutes in the map. This gives you an accurate idea of when the crews will be finished each day, and when they will be servicing particular properties.

### To see QX Mapping embedded into My Calendar:

- 1) In *My Calendar*, click **Activities > QX Mapping > Map It**.
- 2) You will now see the Map and directions generated on the right-hand side of *My Calendar*.

### To change the width of the embedded Map:

- 1) Follow the steps above to make sure the map is already visible in *My Calendar*.
- 2) Click **Activities > QX Mapping > Width**, and choose either 25%, 50%, 75%, or if you want to make the map invisible again, choose 'Hidden'. Note: when the map is visible it uses a lot of your computer's RAM resources. By making it 'Hidden', you will gain these RAM resources back.

### To view how estimated service times affect the day length:

- 1) Make sure there are services with the status of On Route in *My Calendar*.

- 2) Edit each service to make sure there are estimated hours entered for the services, under the *Job Items* tab.
- 3) Click **Activities > QX Mapping > Map It**. You'll see in the directions that there is a stay time equal to the estimated man hours divided by the number of crew members.

## 14. Changes to the Template Designer

Versions: All

Two small changes were made to the Template Designer. The first is the ability to replace a data source with another data source, and not lose all the fields and formulas that were on the template. The second change is the ability to pick and choose who you share templates with. For example, this is useful if you made a template that you only want QX Support staff to see and download. You can also create your own Share Groups to share templates with.

### To replace a data source:

- 1) Go to Reports > Template Designer: Reports.
- 2) Click **Download Template**. Download both the 'Job\_Cost\_-\_Contract\_Comparison' and the 'Job\_Cost\_Standard' templates.
- 3) In the *Template Designer: Reports* screen, click on 'Job Cost Standard' and then click **New...** For the *Template Name* field, enter 'Job Cost Standard 2nd version', and click **OK**.
- 4) In the *Layout Designer* window, right-click on the root report and choose 'Properties'.
- 5) Click on the *Data Source* tab.
- 6) Click **Data Source Wizard**.
- 7) Click on 'JobCost-Standard\_V2', and click **Done**, and then **OK** to the prompt.
- 8) In the *Root Report Properties* window, click **OK**.
- 9) You have now successfully changed the data source of this template from 'JobCost-Standard' to 'JobCost-Standard\_V2'. In previous versions of the template designer, you would have had to redo all fields, formulas, group

fields, subreports, and summary fields. In QXpress version 4.0 you will only have to redo the fields that were not common to both data sources.

### To create a Share Group:

- 1) Go to **Reports > Template Designer: Reports**.
- 2) Click on a template that you would like to share.
- 3) Click **Share Template**.
- 4) Click the details button (...) beside the *Limit Sharing to Share Group* drop-down list.
- 5) Click **New Share Group**.
- 6) Enter a meaningful name for your Share Group, and click **OK**.
- 7) Choose your new Share Group from the *Name* drop-down list.

### To add users to a Share Group:

- 1) Go to **Reports > Template Designer: Reports**.
- 2) Click on a template that you would like to share, or have already shared with other users.
- 3) Click **Share Template**.
- 4) Click the details button (...) beside the *Limit Sharing to Share Group* drop-down list.
- 5) Choose your new Share Group from the *Name* drop-down list.
- 6) Click **Add User**.
- 7) Enter the User Name of the QXpress user you would like to add to your Share Group. You must ask your fellow QXpress users in private for their User Name in order to do this. QXpress Support will not provide you with the User Names of other users.

### To share a template with a Share Group:

- 1) Go to **Reports > Template Designer: Reports**.
- 2) Click on a template that you would like to share, or have already shared with other users.

- 3) Click **Share Template**.
- 4) Fill out all fields, and make sure you choose the appropriate Share Group under 'Limit Sharing to Share Group'.
- 5) Click **Share Report**.

## 15. Other new features

There are several other new features in QXpress version 4.0 that will help you with your day-to-day operations. Like the other features added to QXpress, these features are a direct result of suggestions made to the suggestion box on [alocet.com](http://alocet.com).

### **QXDC support for 320x320 PDAs:**

Versions: All

The QXDC (QXpress Data Collector) has been redesigned to be compatible with 320x320 Palm OS PDAs. Up until now, the QXDC has only been compatible with 160x160 Palm OS PDAs.

Caution: QX 3.0 and QX 4.0 share the same QXDC files. Upon installing QXpress version 4.0, you will need to go to *My Calendar* and click **Activities > QXDC > Install on PDA** to install the latest QXDC components onto your Palm.

This is the only area of QXpress that is shared between your existing QXpress version 3.0 and the Alpha version of QXpress version 4.0.

### **Forward & backward date buttons in My Calendar:**

Versions: All

In *My Calendar*, there are two new buttons found to the right of the From and To dates. Using these arrows you can scroll through dates on *My Calendar* without manually selecting the dates and clicking **Refresh**.

### **QuickBooks 2004 compatibility:**

Versions: All

QXpress has been configured to be fully compatible with Intuit's upcoming QuickBooks 2004.

### **Copy Est. Qty to Charge Qty option in Job Items:**

Versions: QXpress Gold, QXpress Platinum

In the *Job Items* tab of a service, click **Activities > Copy Est. Qty to Charge Qty** to copy all values from the *Est. Qty / Hours* column to the *Charge Qty* column. This is useful on services with many job items and where a bid is calculated as a per unit price for materials and a price per hour for services.

### **Ability to post service times while still On Route:**

Versions: QXpress Gold, QXpress Platinum

In previous versions of QXpress, you could only post service times to QuickBooks when services have a status of 'Done'. In QXpress version 4.0, you can now post service times (**Post To QuickBooks > Service Times**) when the services have a status of 'On Route'. Just make sure you have a check in the *Include services 'On Route'* checkbox. If the services have not yet been invoiced, you will have to go to the *Not ready to send to QB* tab.

### **Rename crew:**

Versions: All

Under **Lists > Crews**, you now have the option to rename crews. Note: you cannot rename crew '001' or crew 'n/a'.

### **Zoom on Day View:**

Versions: All

Under **View > Day view options...**, you have the option to change your Zoom for the Day View. For example, if you change the Zoom to 75% you will see more columns and services in *My Calendar*, but they will be smaller in size. By default the Zoom is 100%.

## **Service times can extend beyond midnight:**

Versions: QXpress Gold, QXpress Platinum

QXpress previously did not support recording a service time that crossed over midnight. In QXpress version 4.0, when a stop time entered is earlier in the day than the start time, QXpress will prompt you to ensure that the time did in fact cross over midnight.

## **New options for posting invoices to QB:**

Versions: All

Under **Post To QuickBooks > Invoices**, you now have two new checkboxes available: *Include Work Order # into Invoice Memo?* and *Use QB Item Description instead of QX Charge Description?*.

*Include Work Order # into Invoice Memo?* - This feature is only available when you have Work Order numbering activated (**Edit > Preferences**). When there is a check in this checkbox the Work Order numbers of the services on the invoice will be included in the Invoice Memo in QuickBooks. This makes it easy to find an invoice in QuickBooks based on a Work Order #.

*Use QB Item Description instead of QX Charge Description?* - If there is a check in this checkbox, QXpress will not use the QXpress Charge Description in the invoice for the Description column. Instead it will look to see what the Item Description entered into QuickBooks was, and use that instead. This is useful for companies that like to print their invoices in QuickBooks and already have detailed descriptions for their Items.

## **Assigning a service to multiple crews:**

Versions: QXpress Platinum only

A common question is 'how do I assign a service to multiple crews?'. The answer is to use a project instead of a one-time service, and schedule a project visit to the second crew. The answer in QX 4 is now, however, to (i) Right-click on a one-time service, (ii) Click 'Convert to project', (iii) Right-click on the service, and (iv) Click 'Copy project visit to crew...'

