QXPRESS VERSION 5.0 FEATURE LIST

This document lists the main new features included in the QXpress version 5.0 release. For every feature listed, there is also a description of the feature and step-by-step instructions explaining how to use the feature.

1. Template Designer version 2.0

Versions: All

The Template Designer has been fully re-written to be easier to use, faster, and more powerful. These means that you'll be able to create your own route lists, work orders, invoices, and reports much faster and easier than before. In addition, you now have new features such as being able to email all templates to your crews and customers.

To convert a template to Template Designer version 2.0 (TD2):

1) In *My Calendar*, click **Print > Print Work Orders** / **Route Lists**.
2) Click **Customize**.
3) Click on the template you want to convert.
4) Click **Edit**.
5) You will receive a prompt 'Convert to Template Designer version 2.0?'. Click **Yes**. This will make a copy of your template, with the same name as your version 1.0 template, but with '_TD2(1)' added to the name.
6) The template will now open in Template Designer version 2.0. To save changes, click **OK**. Note that the process is the same for converting Invoice and Report templates.

To insert a group field:

In the Layout Designer window, you can now insert and view groups directly on the main root report, which is different from Template Designer version 1.0 where the group headers and group footers were found on an entirely different screen.

1) In the *Layout Designer*, right-click on an empty area of the template.

2) Choose **Insert Objects > Group**.

3) Click on the field you want to group by, and click **OK**.

4) You'll see that a group header and a group footer have been inserted onto the root report. You can move existing fields on and off group sections to other sections of the template, as well as insert new fields and objects.

To insert a Sub Report:

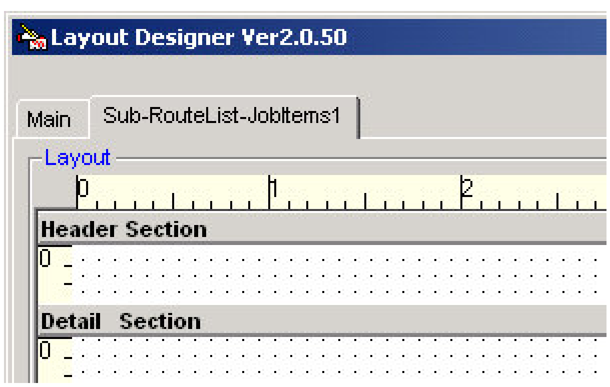
One common issue with Template Designer version 1.0 was that Sub Report fields could easily be moved off and onto a Sub Report, causing errors and inconsistent data. In Template Designer version 2.0 a Sub Report has its own tab in the *Layout Designer*. That way a field that belongs to a Sub Report cannot be viewed from the root report, and root report fields cannot be viewed from the Sub Report.

1) To insert a Sub Report in the *Layout Designer*, right-click on an empty area of the template. *Note: do not right-click in a group header or group footer as they cannot contain Sub Reports*.

2) Choose **Insert Objects > Sub Report**.

3) Choose a Sub Report datasource, and click **Done**.

4) You'll see a new tab created at the top of the Layout Designer, beside the tab labelled 'Main'. Under this tab you can add data fields and other objects. To go back to the main root, click on the Main tab.



To select multiple items:

In Template Designer version 1.0 moving and formatting fields could be a tedious process. This was a result of the fact that you could only specify size, position and fonts for one field or object at a time. In Template Designer version 2.0, you can select multiple fields and objects and move them or change their properties with a single click.

1) In the *Layout Designer*, using your keyboard, click on an object on your template. It will be surrounded by 8 blue squares, indicating that it has been selected.

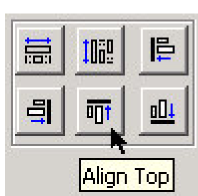
2) Hold the CTRL key down on your keyboard, and while holding down the CTRL key click on another object on the template. The original object will now be surrounded by 8 white squares, and the most recently selected object will be surrounded by 8 blue squares.

3) Continue clicking on objects until all the objects you wish to select have been selected.

4) Another way you can highlight is using your mouse. To use a mouse simply left-click on an empty area of your template, and while holding down your left mouse button, drag your mouse over top of all the objects you wish to select. Once you release your left mouse button, all the objects you dragged your mouse over will selected. *Note: to select an object using your mouse, the entire object must be dragged over. Dragging over part of the object, like an edge, will not select it.*

5) Once all objects are selected you can move them to a different area on the screen by left-clicking on one of the selected objects, and while holding down the left mouse button moving the mouse to the desired new location for the object.

6) You may also use the aligning and sizing tools to make sure text, field and formula objects have the same top, bottom, left, right, width or height. Hover your mouse over these tools to learn about what they can do:



To use the formula wizard:

In Template Designer version 1.0, creating a formula required an advanced level of knowledge, and sometimes actual programming skills. Recognizing this, Template Designer version 2.0 has a formula wizard that enables any QXpress user to create formulas by selecting from a list of existing formula templates.

1) In the *Layout Designer*, right-click on an empty area, and choose **Insert Objects > Formula**.

2) Right-click on the formula that has been added, and choose **Properties**.

3) Click on the *Formula Field* tab.

4) Click **Create with Formula Wizard**.

5) Go through the steps of the Formula Wizard to create your formula.

To insert fields into an rtf object:

1) In the *Layout Designer*, right-click on an empty area and choose **Insert Objects > Rich Text**.

2) Resize the newly inserted Rich Text (RTF) object to the desired size and position.

3) Right-click on the RTF object, and choose **Properties**.

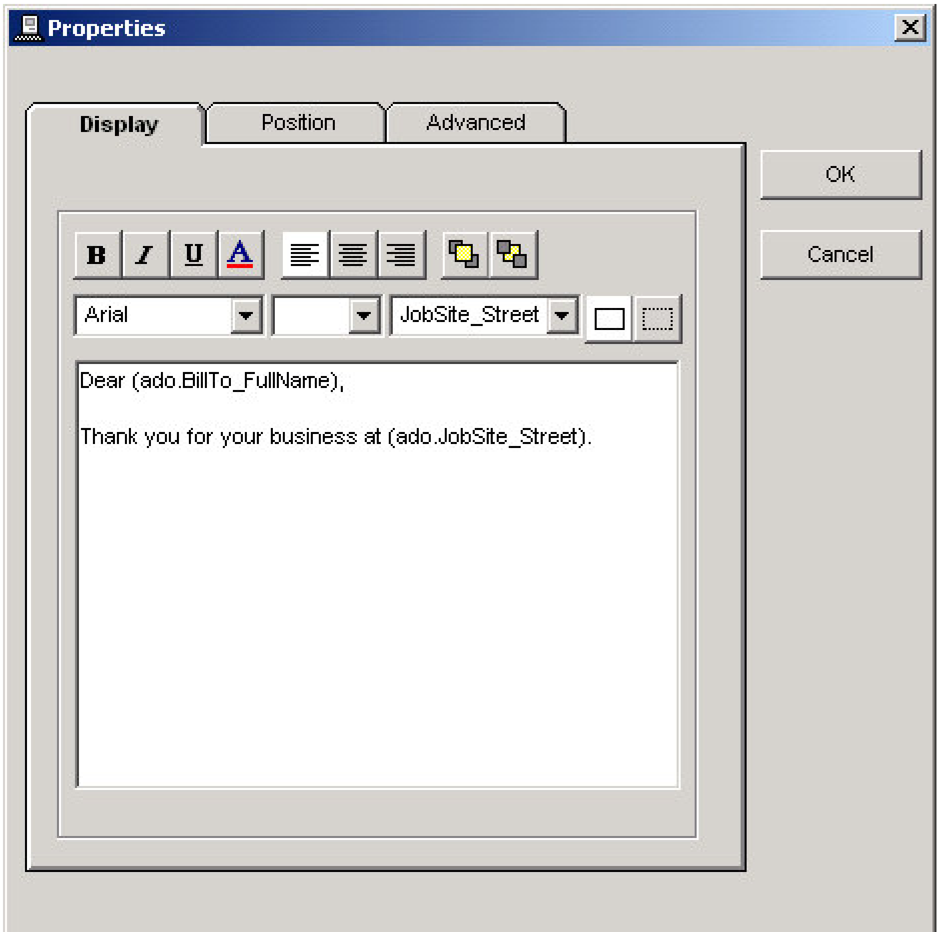
4) Type out the body of your RTF text. For example, type:

   Dear ,

   Thank you for your business at .

5) With your mouse, left-click after “Dear ”. Choose a field from dropdown list above, such as “BillTo_FullName”.

6) With your mouse, left-click after “Thank you for your business at ” and choose a field from above, such as “JobSite_Street”. The RTF body will now look like the example below. When this template is run, it will fill in BillTo_FullName and JobSite_Street with a real customer’s name and address.



To insert dynamic pictures:

Template Designer version 2.0 has a new feature for displaying pictures. The picture can be different for each record depending on the location of the picture on your hard drive. For example, you could create a custom field in the *Customers* screen that specifies the location of a picture of the customer's property. Then, on a template, you could display that image automatically.

1) In the *Customers* screen, click the *Edit Custom Fields* tab, and create a new custom field called 'PropertyPic'.

2) For each customer you want to display a picture of their property for, enter the file path of the picture in the customer's account. An example of a file path would be: "F:\pictures\customers\bob_crenshaws_home.jpg".

3) In the *Layout Designer*, right-click on an empty area of the template.

4) Choose **Insert Objects > Picture**.

5) Resize the newly inserted picture object to the desired size and position.

6) Right-click on the picture object, and choose **Properties**.

7) Choose the option “Select picture by selecting a database field which contains the picture file path”.

8) Click on the field that has the file path of the picture. In this example, select “PropertyPic”.

9) Click **OK**.

10) Click **OK** again to save the template.

11) Print the template, making sure that the customers you entered the picture file path for are being displayed on the screen. You’ll see the picture has been stretched to fit the size of the picture object on the template.

To switch the page orientation from Landscape to Portrait:

1) In the *Layout Designer*, right-click on an empty area on the template.

2) Choose **Properties**.

3) Under the *Orientation* frame, choose Landscape.

4) Click **OK**. You’ll see the size of the template has changed, and the ruler at the top of the page has been extended.

5) Click **OK** to save the template.

To hide a field when previewing & printing:

Sometimes fields and formulas are used to create values that are used by other objects, such as other formulas, RTF objects and summary fields. In Template Designer version 1.0 to make sure these fields and formulas were hidden, you would have to set the foreground and background color to white, thus making them invisible. In Template Designer version 2.0, however, there is a much cleaner solution called “Hide for Print / Preview”.

1) In the *Layout Designer*, right-click on any object (with the exception of a Sub Report).

2) Choose **Properties**.

3) Click on the *Advanced* tab.

4) Put a check in the *Hide for Print / Preview* checkbox.

5) Click **OK**. When this template is now previewed or printed, this object will not be displayed.

To share a field between a Sub Report and root report:

Sometimes you will want to share values between a Sub Report and the main root report. For example, a Sub Report may have a summary field in the footer that totals the number of estimated man hours. To display this below the Sub Report, on the main root report, you can use a share field.

1) In the *Layout Designer*, add a Sub Report, or right-click on an existing Sub Report and choose **Go to Sub Report**.

2) Right-click in the Footer Section, and choose **Insert Objects > Summary Field**.

3) Right-click on the newly inserted Summary Field and choose **Properties**.

4) Click on the *Summary Field* tab.

5) For the *Choose the type of summary* dropdown list, select "Sum".

6) For the *Choose the field you want to summarize* dropdown list, select a numeric field, such as "JobEstHrs".

7) Click **OK**.

8) In the *Layout Designer*, select the *Main* tab.

9) Right-click in an empty area, and choose **Insert Objects > Share Field**. *Note: the share field must be inserted into the same section as the Sub Report. In situations where you need to share the value of a field in a different section, you'll need to create an additional formula in the main report that references the share field.*

10) Right-click on the newly inserted share field, and choose **Properties**.

11) Under the *Formula Field* tab, choose the summary field that was created in the Sub Report and click **OK**. This value from the Sub Report will now be displayed on the main root report, as well as be made available for formulas and other objects on the main report.

To email a template:

A major new feature of Template Designer version 2.0 is the ability to email every template directly from QXpress. In a similar fashion to QuickBooks, QXpress converts the template into a PDF file, and uploads it directly to a remote server to email to your crews and customers.

When you click **Send Email**, the Template Designer loops through each page of the report. When the email address on the page changes, a separate email is created. After it has looped through all pages, it brings up a batch of emails to send.

The default email address for route lists and work orders is the email address, as entered into QuickBooks, for the Crew Leader of the crew performing the service. The Crew Leader is set in QXpress under **Lists > Crews**. The default email address for invoices, and customer based reports is the email address of the customer, as entered into QuickBooks.

To email a template:

1) For the template you wish to email, go to the *Print Preview* screen as if you were to print it.

2) Click **Send Email**.

3) To email now, click **Send Now**. To email at a later time, click **Send Later**.

To change the sorting of records on the template:

1) For the template you wish to change the sorting order of, go to the *Print Preview* screen.

2) Click **Filter** / **Sort**.

3) If you also want to filter the report, double-click on the fields you wish to filter on, otherwise just click **OK**.

4) Under the *Sort* frame, choose the fields you want to sort on. *Note: if a template has one or more groups, it will first sort by the groups, and then by the fields within the groups as you specify.*

5) Click **OK**.

To change the printer before printing:

1) For the template you wish to print, go to the *Print Preview* screen.

2) Click **Print**.

3) Under the *Printer* frame change the printer to your desired printer, and click **Print.**

To search on downloadable templates:

As the list of downloadable templates grows it becomes harder to find the templates you need. In QXpress version 5.0 you can now search downloadable templates based on the shared name of the template, the group of users the template was shared to, the description of the template, and who the template was created by.

For example, imagine you are a franchisee of the "ABC Services Franchise", and the ABC Services Franchise creates a list of accepted invoice formats for you to download. To see this list:

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

2) Click **Customize.**

3) Click **Download Template.**

4) Enter "ABC" in for the *Share Group* at the top, since partial matches are accepted.

5) Click **Filter.**

6) If you were part of the "ABC Services Franchise" share group, you would then see only the ABC invoice templates. *Note: if you are not a member of a share group you will not be able to view or download templates from that share group. Only the creator of a share group can add you as a member*.

2. Generating a batch of invoices: new options

Versions: All

Several new features have been introduced to give you more power and flexibility when generating invoices.

To skip the Print screen when generating invoices:

If you print your invoices in QuickBooks, and just generate your invoices in QXpress, you may find it unnecessary to always have to view the *Print*

Preview Screen. Using this option, you can bypass the *Print Preview* screen after invoices are generated. *Note: in order to print or email invoices from QXpress, you must still go to the Print Preview screen*.

1) Click **Invoices > Generate Invoices**.

2) Put a check in the *Skip print invoice screen* checkbox.

3) Click **Cancel** to close the screen.

4) Next time you generate invoices it will remember this setting and not go to the *Print Preview* screen after invoices have been generated.

To go directly to the Post to QB screen after generating invoices:

Once you have generated invoices in QXpress, you may wish to post the invoices to QuickBooks right away. To be taken to the Post to QB screen after you generate invoices:

1) Click **Invoices > Generate Invoices**.

2) Remove the check from the *Skip Post To QB* checkbox.

3) Click **Cancel** to close the screen.

4) Next time you generate invoices it will remember this setting and go to the *Post to QB screen* after invoices have been generated and previewed. If you have the *Skip print invoice screen* checkbox selected as well, you will be taken to the *Post to QB* screen directly after the invoices have been generated.

To only generate invoices of type ‘Print’ or ‘Email’:

Now that invoices can be both printed and emailed from QXpress, you will likely want to create two batches of invoices, one batch to print, and one batch to email.

1) Make sure that your services that should be emailed have the invoice type of Type 4, Type 5 or Type 6.

2) Click **Invoices > Generate Invoices**.

3) In the *Include services with the invoice type* dropdown list, select either “Print” or “Email”, depending on the type of invoice batch you want to create. The “Print” option will create a batch of Type 1 (Print: Batch - End of Billing Period) invoices. The “Email” option will create a batch of Type 4 (Email: Batch - End of Billing Period) invoices.

4) Click **Generate**.

To change the order that Type 1 / Type 4 invoices are generated in:

In prior versions of QXpress you could not change the order that a batch of Type 1 or Type 4 invoices were created in. They would always be created based on the sort code of the services in My Calendar. In QXpress version 5.0 you can now have the invoices generated in the order of City, Customer Filename, Sort Code, Map Code or Zone.

1) Click **Invoices > Generate Invoices**.

2) Choose the desired order to generate invoices from the *Sort by* dropdown list.

3) Click **Cancel** to close the screen.

3. History tab of the Customer screen

Versions: All

The *History* tab of the customer screen has been enhanced to become your 'contact center' when a customer calls. The *History* tab can now automatically query QuickBooks and list Estimates, Invoices, Payments, Credit Memos and Invoices, as well as QXpress service dates and contact manager events. You will be able to WOW your customers with your ability to give answers quickly.

To load the history tab with QuickBooks transactions:

With QuickBooks open on your computer, simply click on the *History* tab in the *Customer* screen. QXpress will check to see if you have QuickBooks open, and that you are using QuickBooks Pro 2002 or higher. It will then query QuickBooks and retrieve the latest list of QuickBooks transactions. *Note: If it has already queried QuickBooks for this customer today, it will not automatically query QuickBooks again. You'll have to manually refresh the list by clicking **History > Refresh**.*

To show / hide transactions:

You can control what type of transactions are shown in the *History* tab by clicking **History** and choosing the transactions you want to see. For example, you may only want to show Open Invoices so that you can see which invoices are outstanding.

To view the full details of a transaction:

To jump to the actual service, contact manager event or QuickBooks transaction, simply click **History > Go to...**. *Note: jumping to the QuickBooks transaction requires QuickBooks Pro 2004 or higher.*

To manually refresh the *History* tab with QuickBooks transactions:

QuickBooks transactions will automatically load when you go to the *History* tab, assuming you have QuickBooks open. However, if QXpress has already refreshed the *History* tab for this customer today, it will not requery QuickBooks, for the reason of increasing performance. If you wish to manually refresh the *History* tab, click **History > Refresh**.

To add a new contact manager event from the *customer* screen:

To add a new contact manager event for a customer directly from the *Customer* screen, either click Alt+C, or from the *History* tab, click **History > New contact...**.

4. Alocet PDF Writer

Versions: All

The QX5 installation program places the Alocet PDF writer on your computer. This feature allows you to create PDF documents from anywhere in QXpress or any other windows program. The Alocet PDF writer acts like any other printer on your computer, except that rather than outputting to a physical printer it saves a PDF file on your hard drive.

To create a PDF file from a template in QXpress:

1) In QXpress, open any invoice, route list, work order, or template designer report, and go to the *Print Preview* screen.

2) Click **Print**.

3) Under the *Printer* frame, change the printer to be “Alocet PDF Writer”.

4) Click **Print**.

5) A dialog box will appear asking you where you want to save your PDF file to. Set the File Name and Save In location for your PDF, and click **Save**.

5. Inventory Adjustments

Versions: QXpress Gold, QXpress Platinum

In prior versions of QXpress, you may have found that QXpress alone was unable to help you keep track of actual usage of inventory items in QuickBooks. This occurred because QXpress posts over what was listed on the Invoice, rather than what was actually used. To solve this problem, a new feature called "Inventory Adjustments" looks 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.

6. Posting Vendor (subcontractor) bills:

Versions: QXpress Platinum

In prior versions of QXpress, subcontractor bills were sent over to QuickBooks at the same time as the invoice. This caused problems in the case of the bill needing to be sent to QuickBooks earlier than the invoice, or in situations where the job was not even invoiceable. Therefore, in QXpress version 5.0, posting Vendor Bills to QuickBooks is a separate step from posting invoices.

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**.

7. Resizing screens

Versions: All

QXpress is optimized for a 800x600 resolution. However, if you have a large monitor and have a higher resolution, you may have found the need in the past to make the customer screen, contact manager screen or service screen larger so that you could see a longer or wider list.

QXpress version 5.0 not only reshapes these screens to fit your desired size, but it also memorizes these settings so that your desired setting will be used next time you open QXpress.

Note: this applies to the *Customer* screen, *Contact Manager* screen, *Service* screen, *New Schedule* screen, *Charge Description List*, *Invoice List*, *Crew List* and *Equipment List*.

To resize a screen:

1) Hover your mouse cursor over the edge of the screen. This can be in any of the 4 corners of the screen, or any of the 4 edges of the screen. A cursor will appear with two black arrows pointing in opposite directions.

2) Left-click your mouse, and while holding down the left mouse button, drag the screen wider or longer as desired. When the desired size is reached, release your left mouse button.

8. Printing My Calendar

Versions: All

A common request from QXpress users has always been to be able to print the Day View / Week View / Month View / Cust View calendars. Now you can!

Note: printing My Calendar does not apply to the "List View".

To print My Calendar:

1) In *My Calendar*, change the view to either "Day", "Week", "Month" or "Cust".

2) Click **Print > Print Calendar**.

9. 'OR' criteria for Memorized Filter Lists.

Versions: All

In the past, when searching for customers or creating Memorized Filter Lists, you could only filter on one value per field at a time. In some circumstances this made the process of making filters cumbersome. For example, creating a list of customers with a preferred day of Monday was easy. But creating a list of customers with either the preferred day of Monday OR Tuesday was a lot more difficult. You would have to filter the list 5 times, to exclude customers whose preferred day was Wednesday, Thursday, Friday, Saturday or Sunday! In QXpress version 5.0 this task is a lot easier, as you can accomplish this in one filter using the ';' symbol.

To use the OR search to search for customers:

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

2) Click the *Find* tab.

3) Click inside any field you want to search on, for example, “File name”, “Zone”, “Customer ID”, etc.

4) Enter your first search criteria. For example, for searching on “File name” enter “Bob”, without the quotation marks. If you are searching using a dropdown list, select the first item from the list you want to search on.

5) Enter the “;” symbol, without the quotation marks.

6) Enter your next search criteria. For example, your search may now look like: “Bob;Craig”. If you are searching using a dropdown list, click inside the dropdown list and manually type the search criteria.

7) Repeat steps 5 and 6 above for each search criteria. There are no limits to the number of search criteria you can use.

8) Click **Filter**.

9) The list of customers will be shown that meet one of the criteria you entered.

10. Customizing the “List” view in My Calendar.

Versions: All

It is a common request to be able to add and remove columns to and from the “List” view in My Calendar. Common examples are the ability to hide the Target and Actual profit columns, or adding the Zone, City and ZipCode columns.

To show / hide columns to List view:

1) Click **Edit > Preferences...**.

2) Click on the *List View* tab.

3) Put a check under the *Show?* column beside the columns you want to show, and remove the check from the columns you want hide.

4) Click **OK** to save.

11. Crew Names in Day / Week view

Versions: All

In addition to the three character Crew Number, QXpress version 5.0 now shows the Crew Name in the column header of Day / Week view. This allows you set and view a meaningful name of the crew instead of having to memorize the meaning of the three character Crew Number.

To set a Crew Name:

1) Click **Lists > Crews**.

2) Choose the Crew you want to change the Crew Name of from the *Crew* dropdown list.

3) Enter the Crew Name for this crew, and click **OK**.

4) In *My Calendar* ensure that the *View* is either “Day” or “Week”. You’ll now see the Crew Name in the column heading.

12. Print Work Order from the service screen

Versions: QXpress Gold / QXpress Platinum

To print a work order from the service screen

1) In either *My Calendar* or the *Customer* screen, right-click on the service you want to print and choose **Edit**. If the service is recurring or zone-based, you will have to go to *My Calendar* to do this.

2) Under the *General* tab, make sure the status of the service is “On Route”.

3) Click on the *Job Items* tab.

4) Click **Print Work Order**.

13. Changes to the Contact Manager

Versions: QXpress Gold, QXpress Platinum

In QXpress version 5.0, the Contact Manager has been enhanced to make it much easier and faster for you to track every contact you have with your customers. Together with the changes made to the *History* tab of the *Customer* screen, you and your staff should now have all the information you need to know about your customers easily accessible at all times.

Your customers will appreciate your ability to answer their questions quickly and effectively.

In addition to a new field “Date Entered”, there is also a place to attach any windows file, such as a picture or Word Document, to the contact event. Also, default settings for Event Type and Event Status on new contact events are automatically saved and preset for the next contact event you add.

To attach a file to an event:

1) Click **Lists > Contact Manager**.

2) Click **New.**

3) Beside the “Attached File” field, click **Browse...**.

4) Choose a file from your hard drive, and click **Open**. If the image is a .gif, .bmp or .jpg the image will preview under “Attached File Preview”.

5) To open the attached file, click **Open Attached File**.

To quickly record a conversation without using a mouse:

1) From My Calendar, type Ctrl+J. This will bring up the *Customer* list.

2) Start typing the name of the customer. When the customer is highlighted, hit Enter on your keyboard.

3) If the customer has questions about their account, look under the History tab. If the tab is not currently selected, type Alt+H.

4) To enter a new contact event, type Alt+C and start typing the note.

5) Hit Enter on your keyboard to save the event and return to the *History* tab.

14. Changes to Attached files

Versions: QXpress Platinum

Since the Contact Manager now has the ability to attach a file to each Contact Event, the Attached Files section of QXpress becomes unnecessary. Therefore, all existing attached files have be moved to Contact Manager Events.

15. Remote Data Services (RDS)

Versions: All

In prior versions of QXpress, you needed one copy of QuickBooks on each computer that had QXpress installed if you wanted QXpress to interact directly with QuickBooks on that computer. In other words, computers that had QXpress installed, but not QuickBooks installed, could not Get QB Data, add customers, post invoices, etc.

QXpress version 5.0 now supports a tool provided by QuickBooks called "Remote Data Services (RDS)", which allows you to share a QuickBooks connection on one computer with many other computers on your network.

For a full detailed explanation, please visit the following tech article:

http://www.alocet.net/downloads/QX5-RDS.pdf

16. Dialing a customers phone number

Versions: All

If you have a modem on your computer, and your computer has line in and line out ports, you can plug your phone into your computer, and your computer into a phone jack, so that QXpress can dial the customer's phone number or alternative phone number for you.

To dial a customers phone number:

1) In the *Customer* screen, click **Customer > Call**.

2) Choose either **Phone** or **Alt Phone**.

3) Pick up your handset. You should hear that the customer's phone number has been dialed for you.

17. Importing a QuickBooks Estimate

Versions: QXpress Gold, QXpress Platinum

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.

18. QXpress SDK

Versions: All

Next to the release of Template Designer version 2.0, the other big release with QXpress version 5.0 is a robust SDK (Software Development Kit). This SDK allows software programmers to interact directly with QXpress data, in the same manner that QXpress interacts directly with QuickBooks.

To get more information, please visit:

http://www.alocet.com/qxsdk.cfm

19. Order of custom field tab groups

Versions: All

In the *Customer* screen you can create up to 10 custom tab groups, with 15 fields per group. In prior versions of QXpress, once you named and populated your tab groups, there was no way to go back and re-sort the order the tabs appeared in.

In QXpress version 5.0, you now have this ability.

To change the order your custom field tab groups appear in:

1) In the *Customer* screen, click *Edit Custom Fields...*.

2) In the *Group attributes* frame change the *Order* field to the order you want this tab to appear.

Note: changes made to the group tab order will not take into affect until next time you open the Customer screen.

20. Other new features

There are several other new features in QXpress version 5.0 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.

Customer balances automatically updated:

Versions: All

In prior versions of QXpress, getting new QB data was the only way to refresh the balances of customers. In QXpress version 5.0 when an invoice is posted to QuickBooks, the new customer balance is automatically updated in QXpress. In addition, to get to latest customer balance, you can also click **History > Refresh** under the *History* tab of the *Customer* screen.

QB 2005 compatibility:

Versions: All

QXpress has been configured to be fully compatible with Intuit's upcoming QuickBooks 2005.

Contact Manager event reminders:

Versions: QXpress Gold, QXpress Platinum

User feedback has suggested that the Contact Manager event reminders in a message box style are distracting, and sometimes bothersome. Reminders have been changed to be a sound being played, and a yellow bar in the top right-hand corner of your screen saying "You have contact events to view". When you double-click on this bar, it takes to you to the events to view.

Template Share Group - shared templates cannot be re-shared:

Versions: All

Once a template has been shared as part of a share group, it can be downloaded and edited by members of the share group. In QXpress version 5.0, however, the edited copy cannot be re-shared by a user, unless the user is the actual creator of the share group.

New feature for default job items:

Versions: QXpress Gold, QXpress Platinum

In prior versions of QXpress, default job items would be set only on a newly added service. When a service is added, all the default job items automatically get added for that Charge Description. If you then added subsequent job items, no defaults would be pulled over. In QXpress version 5.0, however, any newly added job item is checked for the default job items of the job item's Charge Description and any defaults are then brought over.

Edit a service from the Job Cost Timesheet:

Versions: QXpress Gold, QXpress Platinum

If you track actual service times of crews, you may find that the most efficient way to enter the times is to go to the Job Cost Timesheet, where you can enter the start and stop times of each service. You may find it cumbersome, however, if there were any materials used or job notes entered for that service as well, since you'll have to close the Job Cost Timesheet, find the service, and then edit it. In QXpress version 5.0, you can either double-click on the service time, or click **Activities > Edit Service**, and go right into the *service* screen for that service.

QuickBooks-style dropdown lists for customers and Charge Descriptions:

Versions: All

QXpress version 5.0 adopts QuickBooks-style dropdown lists for Charge Descriptions and customers. This means that you can either type a subitem's name, or the main item and it will be found for you. For example, if you have the Charge Descriptions:

Ladder
Ladder:Wooden
Ladder:Metal

You can type either "Metal" or "Ladder:Metal" and you will easily find the the "Ladder:Metal" item. This makes it easier for new QXpress users who are used to the QuickBooks style of dropdown lists. In addition, for users who have many items and customers, it can save a lot of time for data entry.

Typing Customer:Job in the *Customer List*:

Versions: All

In keeping with QuickBooks methodology, in the *Customer List* you can now start typing either a customer's name, or the customer:job name and you will be taken right to that customer or customer:job.

More fields in the *New and Edit Customer* screen:

Versions: All

If you are using QuickBooks Pro 2004 or higher, you now have additional fields available, such as Payment Method, credit card fields, and Customer Type.

Dispatch to email / pager:

Versions: All

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 now 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 technican with the phone number (703) 555-1234, you can send a text message to that phone by emailing 7055551234@messaging.nextel.com. By right-clicking on a service in My Calendar, and choosing **Dispatch to email / pager**, you can email a new appointment or changed appointment to a technician in the field.

Updating custom field names:

Versions: All

In previous versions, every time custom field names and settings were changed, a screen would appear updating 165 custom field names. Now, custom field names are now only updated before printing and editing templates, and when templates are downloaded. This will lower the number of times QXpress has to go through this procedure.

QuickBooks Custom Fields:

Versions: All

QXpress will now read QuickBooks custom fields from QuickBooks Pro 2003 and greater. In addition, the custom fields are available for adding and editing QuickBooks customers if you are using QuickBooks Pro 2004 and greater.

Notes field on Client Variables:

Versions: All

Client Variables now have a Notes field. This provides an alternative to QXpress custom fields for companies that track equipment on customers properties. The advantage of entering equipment here is the ability to have no limits on the number of equipment entries for equipment of a specific type.

Post zero amount Parent items:

Versions: All

There is a new checkbox in the *Post To QuickBooks: Invoices* screen. In the case of services that have many job items, the parent item (the first line item) is often a zero-dollar job name. Often this has meaning in QXpress, but not in QuickBooks. If you choose, you can have this line item ignored when posting the invoice to QuickBooks.