QXPRESS VERSION 6.0 FEATURE LIST

This document lists the main new features included in the QXpress version 6.0 release. For every feature listed, there is also a description of the feature and step-by-step instructions explaining how to use the feature.

QUICKBOOKS INTEGRATION

1. QX Sync

Versions: All

This new feature virtually eliminates the need to click **Get new QB data**, providing you are using QuickBooks Pro 2004 or greater. QX Sync is a program that silently listens for changes to QuickBooks. Whether it is adding a new employee, editing an item, or merging two QuickBooks customers, QX Sync will detect the change instantly, and update the changes in your QXpress database - regardless of whether QXpress is even open.

To activate QX Sync:

1) In QXpress, click the *QX Sync* icon in the tool bar.

2) Click **Get new QB data**. This will get the latest QuickBooks data, and also create a "Subscription" for QX Sync.

3) When it is done, close and re-open QuickBooks. From now on, any changes made directly in QuickBooks will instantly be updated in QXpress.

2. Post Service Times to QuickBooks - Include Notes option

Versions: Gold, Platinum, Platinum Enterprise

QXpress users with many service times found the *Notes* field makes the *Employee Timesheet* in QuickBooks hard to read, and un-necessary. Therefore, in the *Post Service Times to QuickBooks* screen there is a new checkbox *Include Notes*.

To no longer have notes posted to the QuickBooks Employee Timesheet:

1) Click **Post To QuickBooks > Service Times**.

2) Clear the *Include Notes* checkbox.

3) Either click **Post to QB** or **Close**.

QX MAPPING

3. QX Mapping - Recommend available time

Versions: All - requires the QX Mapping module

Imagine you are sitting in front of *My Calendar*, in the Day View, looking at all your crews for the next three days, and a phone call comes in. It is a customer, and they want a service call. Your job is to slot them into the calendar for a day, crew, and time. It's a tough job because you need to find an available time slot that minimizes the drive time to and from existing services that are already scheduled. This is the purpose of the *Recommend available time* feature, as it will do all necessary calculations automatically for you!

To find the shortest travel distance:

1) In *My Calendar*, make sure you are in Day View, and show the date range and the crew selection that you want QXpress to use for its search for available appointments.

2) If you have not done so already, add the new service into the *Waiting List*, by clicking **Waiting List > New**.

3) Click on the new service in the *Waiting List*.

4) Click **Waiting List > Recommend available time...**.

5) Follow any on screen directions QX Mapping gives you.

6) In *My Calendar* double-click on the recommendation that you would like to select. The service will move from the *Waiting list* to the selected appointment.

4. QX Mapping - Re-route Current Date Range

Versions: All - requires the QX Mapping module

This has been a long requested feature from pest control, lawn / tree spraying, and other industries who need to route days or weeks of work in a geographical manner. Imagine you have scheduled all of your customers who receive a service in the first two weeks of July. It does not matter which day or time these services are on, and it doesn't matter which crew does them, it just matters that they are done in the two week time frame with as little drive time as possible. The new *Re-route Current Date Range* feature will automate your rescheduling and routing for you, and help you group which customers should be serviced on which day.

To show the Re-route Current Date Range feature:

1) In *My Calendar*, show the date range and crew selection you want to re-route.

2) This feature will plot all services in the calendar, and in the *Waiting List*. Therefore, if you have many services in your *Waiting List* it is recommended that you first filter the *Waiting List* to only show the services you want to have plotted.

3) Click **Activities > QX Mapping > Re-route Current Date Range**.

To help you see which services are currently scheduled on which days:

1) On the left-hand side, double-click on a Crew, Day combination. All services for that Crew and Day will be highlighted with a yellow circle, making it easier to see the pushpins for the services.

2) To see more information about the services, such as the estimated man hours and the job site address, right-click on a pushpin and choose **Show Information**.

To see which services cannot be moved to a different day:

1) On the left-hand side, click **Highlight date locked pushpins >**. QX Mapping will highlight all the services that have been chosen as “Date Locked” (see the *QX Mapping - Lock/Unlock Date* feature.

To move a group of services to a different Day and Crew:

1) While holding down your left mouse button, drag over an area that has pushpins in it.

2) Release your mouse button when you have finished highlighting.

3) On the left-hand side, double-click on the new Crew, Day combination you would like to reroute the services to.

4) You should see the man hours and day hours have now increased in the selected Crew, Day combination.

5) Repeat for other Crew, Day combinations until all pushpins now represent the new desired Crew, Day combinations, and you are satisfied with the estimated day hours on the left-hand side.

To save your changes:

1) On the left-hand side, click **Save & Close**. This process may take a few minutes, as QXpress will process the optimal driving order for each Crew, Day combination, the new sort order, start time, and stop time for each service in My Calendar, and move the correct services to and from the *Waiting List*.

To cancel your changes:

1) Click on the “X” icon in the top right of the Map. It will cancel all changes, and return to My Calendar.

5. QX Mapping - Lock/Unlock Date

Versions: All - requires the QX Mapping module

This feature compliments the *Re-route Current Date Range* feature by allowing you to specify some services that should not be re-routed to a different day.

To lock/unlock services:

1) In *My Calendar*, right-click on a service and select **Lock/Unlock Date For QX Mapping**. An icon will should now appear for the service with the *Lock/ Unlock Date* icon.

To show the Lock/Unlock Date icon in List View:

1) Click **Tools > Options**.
2) Click on the *List View* tab.
3) Put a checkbox next to *Lock Date For QX Mapping*.
4) Click **OK**.
5) Click **Refresh**.

SCHEDULING

6. Job Packages - Set missed visits to Needs Renewal

Versions: Gold, Platinum, Platinum Enterprise

When adding Job Packages to a customer's account, you'll see a new checkbox labelled *Set missed visits to Needs Renewal*. If you have this checkbox selected, QXpress will analyze each service in the Job Package. If the service is a Zone based service, and the Approximate Service Date of the service is in a month prior to the current month, the status will automatically be set to Needs Renewal instead of Active. This means the service will not be performed this year, but will be made available for the renewal process next year. This is intended mainly for companies that perform several seasonal services, and pick up customers half way through the year.

7. Recurring Scheduling - Turn off Automatic Rescheduling

Versions: All

You'll now see a new checkbox labelled *Turn off Automatic Rescheduling for this service* under the Recurring Dates tab, when scheduling a recurring service with the basis of Weekly, Biweekly or Other Intervals. Normally, when services of this type are rescheduled, QXpress looks at the basis and minimum days, and looks to rearrange future services so that they are not too close or far away from one another. While this is desired by most users, it can cause problems for users who want full control over rescheduling.

Therefore selecting this checkbox turns off all QXpress automatic rescheduling features.

To turn off automatic rescheduling for a customer’s service:

1) In the *Customer* screen, click on the *Schedule* tab.
2) Click on a recurring service.
3) Click **Schedule > Edit Service or Billing Installment**.
4) Click on the *Recurring Dates* tab.
5) Ensure the *Basis* is either Weekly, Biweekly or Other Intervals.
6) Place a check in the *Turn off Automatic Rescheduling for this service* checkbox.
7) Click **OK**.

To set this option globally for existing services:

1) In *My Calendar* click **Lists > Charge Description list**.
2) This option needs to be set globally per *Charge Description*. Click on a *Charge Description*.
3) Click **Advanced...**.
4) Click on the *Advanced* tab.
5) Place a check in the *Default to turn off automatic rescheduling (for recurring services)* checkbox.
6) Click the details button (...) beside the *Default to turn off automatic rescheduling (for recurring services)* checkbox.
7) Click **Yes** to the *Are you sure?* prompt.
8) Click **OK**.
9) Repeat for other *Charge Descriptions*.

8. Other Intervals - Min days per interval

Versions: All

When scheduling a recurring service with the basis "Other Intervals", you'll see the *Other Intervals* tab has been redesigned to allow a different Min days per interval. Previously QXpress had one min days for the entire service.

9. Min, Max & Done textboxes - select all when entered

Versions: All

Now when you tab into the *Min*, *Max* and *Done* fields under the Recurring Dates tab, the full value inside the box highlights, making it easier to overwrite. Previously you had to delete the existing values before you could start entering your own.

10. Crew Name added to Crew dropdown list in My Calendar

Versions: All

Due to many requests, we have added the Crew Name to the Crew dropdown list in My Calendar.

11. Setting default crews, deleting crew ‘001’ and ‘n/a’

Versions: All

You can now specify default crews for new customers, billing installments, and services added to the *Waiting List*. Setting these defaults to crews other than ‘001’ or ‘n/a’ now allows you delete these crews - a very common request from QXpress users.

To change default crews for the Waiting List / billing installments / new customers:

1) In *My Calendar*, click **Lists > Crews**.

2) Click **Set Default Crew**.

3) Under the *New Services* tab change the crews to crews other than crew ‘001’ or ‘n/a’.

To delete crew ‘001’ or ‘n/a’:

1) In *My Calendar*, click **Lists > Crews**.

2) Under the *Setup Crews* tab, select the crew you would like to delete.

3) Click **Delete Crew**.

12. Default Job Items - Apply settings to Pending Services

Versions: Gold, Platinum, Platinum Enterprise

There is now a feature to apply the default Job Items for a service across all existing services. For example, imagine you have setup hundreds of customers with "Service A". As part of Service A, you always use 1 unit of Material A and 2 units of Material B for every 1000 square feet of property size. If, half way through the year, you make changes to the service to now substitute Material A and Material B with just 1 unit of a new material called Material C, you would have a huge amount of work on your hands changing all the services one-by-one. This new feature, however, changes all existing services with a single click.

To reset existing Job Items of Pending services:

1) In *My Calendar*, click **Lists > Charge Description List**.

2) Click on the desired *Charge Description*.

3) Click **Advanced...**.

4) Click on the *Default Job Items* tab.

5) Make any necessary changes to existing Job Items. Note that this feature ignores the parent Job Item (the first Job Item listed), and only affects the child Job Items.

6) Click **Apply settings to ‘Pending’ services**.

13. Default Start and Stop Scheduling dates

Versions: All

For recurring services, there is now a way to set a default start and stop scheduling date per charge description, saving you from always having to manually change the dates in the Recurring dates tab.

To set default Start and Stop Scheduling dates:

1) In *My Calendar*, click **Lists > Charge Description List**.
2) Click on the desired *Charge Description*.
3) Click **Advanced...**.
4) Click on the *Advanced* tab.
5) Set the default Start Scheduling Date and the default Stop Scheduling Date.
6) Click **OK**.
7) Repeat for other *Charge Descriptions*.

Note: This will not affect existing services. It will only affect services added from this point forward.

14. Waiting List - State/Province field added

Versions: All

For companies that perform services in multiple states or provinces, we have added the State/Province field as an available field to the Waiting List.

To show the State/Province field in the Waiting List:

1) In *My Calendar* click **Tools > Options**.
2) Click on the *Waiting List* tab.
3) Place a check beside “State/Province“.
4) Click **OK**.

5) Click **Refresh**.

15. Waiting List - Available in the List View

Versions: All

The *Waiting List* is no longer limited to just the Day View, it can now be used in the List View as well.

To show the Waiting List in the List View:

1) In *My Calendar* click **Tools > Options...**.

2) Click on the *List View* tab.

3) Place a check in the *Show Waiting List in List View* checkbox.

4) Click **OK**.

5) Click **Refresh**.

To dispatch services from the Waiting List to My Calendar:

1) In the *Waiting List* highlight the services you wish to send to *My Calendar*.

2) Click **Waiting List > Send Services to My Calendar**.

16. Project Scheduling - Reschedule dates later/earlier

Versions: Platinum, Platinum Enterprise

One common request from QXpress users who have long multi-day projects is for an easier way to reschedule future visits. The *Reschedule dates later/earlier* feature allows just this. It pushes all visits in the project later or earlier by a set number of days, in an easy and quick way.

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.

17. Project Scheduling - New view for Date Summary tab

Versions: Platinum, Platinum Enterprise

The Date Summary tab now shows Dates along top of the Project Visits grid, instead of times. This allows you to get an easy overview of what tasks are planned for which dates.

1) Open an existing Project.

2) Click on the *Project Scheduling* tab.

3) Click on the *Date Summary* tab. You’ll now see that dates show on the top instead of times. Also, if you click on any date on the right hand side, the grid will make sure that date is visible.

JOB COSTING

18. Act. Mat Usage - Automatic Job Items

Versions: Gold, Platinum, Platinum Enterprise

Now when you are entering material usage in the *Act. Mat Usage* tab you don't necessarily have to have the material already setup as a Job Item. The list of materials to choose from first lists existing Job Items, but then also lists materials that are not yet Job Items. When you a choose a material that is not yet a Job Item, QXpress will automatically make that material a Job Item for you, saving you several steps.

19. Act. Service Times & Job Cost Timesheet - Automatic Job Items

Versions: Gold, Platinum, Platinum Enterprise

Similar to the *Act. Mat Usage - Automatic Job Items* feature, when entering service times you are no longer limited to the existing Job Items, as you can choose a service that has not yet been made a Job Item.

20. Act. Service Times - Fill Crew Members

Versions: Gold, Platinum, Platinum Enterprise

The *Fill crew members for all that have times entered* feature, that was previously only available in the *Job Cost Timesheet*, is now available in the *Act. Service Times* tab as well.

To use the Fill crew members for all that have times entered feature:

1) Edit any service that has the status of On Route or Done.

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

3) Enter in a Start Time and Stop Time for one or more Job Items. Do <u>not</u> enter anything for the Employee.

4) Click **Activities > Fill crew members for all that have times entered...**.

5) Set your preferences for which crew members performed this service.

6) Click **OK**.

21. Act. Service Times - Distribute Times

Versions: Gold, Platinum, Platinum Enterprise

The *Distribute times to selected services* feature has also been added to the *Act. Service Times* tab, as it was previously only available in the *Job Cost Timesheet*.

To use the Distribute Times feature:

1) Edit any service that has the status of On Route or Done.
2) Click on the *Act. Service Times* tab.
3) Highlight multiple service time entries. The entries should <u>not</u> have a Start Time or a Stop Time.
4) Click **Activities > Distribute times to selected services...**.
5) Enter a Start Time, Stop Time, and click **OK**.

22. Fill crew members screen - Crew dropdown

Versions: Gold, Platinum, Platinum Enterprise

A *Crew* dropdown list has been added to the *Fill crew members* screen. This allows you to easily choose members of a different crew from whom was originally scheduled for the service.

23. Job Cost Timesheet - Inactive Employees

Versions: Gold, Platinum, Platinum Enterprise

In past versions of QXpress, inactive Employees would never show in the Employee column in the *Job Cost Timesheet*. This was due to the fact that you didn't want to mistakenly choose an inactive employee and record time for them. The problem, however, is that when scanning through old history, employees that had since been turned inactive, would only show up as numbers where their names used to be - making it impossible to know who the recorded the time was for. Therefore, a new rule has been set. If the *From* and *To* dates in *My Calendar* are both greater than 7 days ago, the

Job Cost Timesheet will be assumed to be showing history and therefore will load inactive employees, otherwise only active employees will load.

24. Job Cost Timesheet - Resizing

Versions: Gold, Platinum, Platinum Enterprise

You can now resize the Job Cost Timesheet like you could previously with the *Customer* screen, *Equipment List*, *Charge Description List*, etc.

INVOICING

25. Generate Batch Invoices - Invoice Date field

Versions: All

When generating invoices, you now have a new *Invoice Date* field in the *Generate Batch Invoices* screen. By default, today's date will be recommended, but you can always change this date before generating invoices. The Invoice Date can be set in the future or a date in the past.

To change the Invoice Date before generating invoices:

1) In *My Calendar*, click **Invoices > Generate Invoices**.

2) Change the *Invoice Date* field to the new desired Invoice Date.

3) Click **Generate**. The *Invoice Date* and *Due Date* will be based on the date you set, rather than today's date.

26. Generate Batch Invoices - Bill To Address added to Sort By

Versions: All

When generating Type 1 or Type 4 invoices, the *Sort By* dropdown list now includes "Bill To Address 1" and "Bill To Address 2".

To steps:

1) In *My Calendar*, click **Invoices > Generate Invoices**.

2) Change the *Sort by* dropdown list to either “Bill To Address 1” or “Bill To Address 2”.

3) Click **Generate**.

27. Post Invoices to QuickBooks - speed and stability increase.

Versions: All

We have changed the process to send batches of 25 invoices over at a time, as opposed to the whole batch at once. We have found that the larger the batch, the longer it takes QuickBooks to process each invoice, and QXpress users are clicking CTRL-ALT-DEL because they think that QuickBooks and QXpress are frozen. By sending over batches of 25 at a time, it will be faster, and more predictable in speed. From your standpoint, though, you won't notice any additional steps, because you only have to click **Post To QB** once, and QXpress will handle processing the batches of 25 at a time by itself.

28. Post Invoices to QuickBooks - Balance column

Versions: All

We have added a balance column to the Post Invoices to QuickBooks screen.

29. Post Invoices to QuickBooks - Edit Invoice button

Versions: All

You can now edit invoices directly from the *Post Invoices to QuickBooks* screen.

To edit an invoice from the Post Invoices to QuickBooks screen:

1) From *My Calendar*, click **Post to QuickBooks > Invoices**.

2) Select an invoice you would like to Edit.

3) Click **Edit Invoice**.

30. Surcharges (a.ka. Fuel Surcharges)

Versions: Gold, Platinum, Platinum Enterprise

You can now setup Surcharges (usually Fuel Surcharges) in QXpress to be calculated automatically when you create invoice.

To set your preferences for Fuel Surcharges:

1) In the *Generate Invoices* screen, click **Surcharge Settings...** in the lower left-hand corner of the screen.

2) Read the description at the top.

3) Choose the appropriate options. If you would like to put a fixed amount instead of a percentage, set both the Minimum and Maximum equal to that fixed amount.

4) Click **OK**.

5) Generate your Invoices like normal. This preference will be remembered next time you generate invoices.

TEMPLATE DESIGNER

31. Drill-down reports

Versions: All

This is a great feature for the hard core Template Designer enthusiasts. You can now make your own drill-down reports similar to the built-in QXpress Job Costing and Gross Status reports. A drill-down report hides the details of a group section until you double-click on the group header.

To change a report to be a drill-down report:

1) Click **Reports > Template Designer:Reports**.

2) Click on the template you want to convert to a drill-down report.

3) Click **Edit**.

4) Right-click on any empty white area, and choose **Properties**.

5) Under the *Display* tab, ensure *Multi records per page* is selected.

6) Under the *Display* tab, place a check in the *Drill-down report* dropdown list.

7) Click **OK**.

8) Ensure there is at least one group on the report, and there are fields in the *Group Header*. If you have no groups, add a new group by right-clicking and choosing **Insert Objects > Group**.

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

10) Select your template from the list, and click **Show Report**.

11) Double-click on a *Group Header* to show the drill-down detail.

Note: Drilling down only affects the last group before detail.

Note: One draw back is speed. When you double-click on a *Group Header*, the Template Designer has to reload the entire template and fast forward back to the page it was previously on. Therefore, it is not as fast as the built-in QXpress reports like the Job Costing and Gross Status reports.

32. New CUSTOMDATE formula

Versions: All

You can now use a new formula called 'CUSTOMDATE' to produce virtually any date or time format you like.

For example, to set the InvoiceDate format to HH:NN:SS DD/MM/YYYY:

1) Edit your desired template (in this example choose an Invoice template) to get to the *Layout Designer* screen.

2) Right-click on the empty white space and choose **Insert Objects > Formula Field**.

3) Double-click on the new formula field.

4) Click on the *Formula Field* tab.

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

6) Choose a *Character* based output, and click **Next**.

Note: Do not choose a *Date* output. If you do, the Template Designer will overwrite the format you set with your formula to a standard Template Designer date format.

7) Choose *Basic Formula* and click **Next**.

8) Choose the *Field and Character* formula template, and click **Next**.

9) Choose a field that contains a date. In our example, we are editing an Invoice template, so we'll choose *InvoiceDate*.

10) Click **Next**.

11) Click **Finish**.

12) Click **Edit Manually (advanced)**.

13) Edit the formula to be:
CUSTOMDATE('{Root.InvoiceDate}','HH:NN:SS DD/MM/YYYY')

14) In the above formula, HH is for hours, NN is for minutes, SS is for seconds, DD is for day of the month, MM is for a two digit month, and YYYY is for a four digit year.

15) Click **OK**.

16) Click **OK** again.

17) Select your template and print it.

Note: In this example the HH:NN:SS would all appear as 00:00:00 since there is no time in the InvoiceDate. It might be useful in the case of a route list or work order to have two formula fields, one handling the time and one handling the date:
CUSTOMDATE('{Root.JobTimeStart}','HH:NN:SS')
CUSTOMDATE('{Root.JobDate}','YYYY-MM-DD')

33. New MONEYTOTEXT formula

Versions: All

TD2 now has a new MONEYTOTEXT formula which formats a numeric value into written text. This will commonly be used for proposals or contracts. For example, you would use MONEYTOTEXT(({Root.JobSetupAmount})) if you wanted the Job Setup Amount of $110.17 to appear as "one hundred and ten dollars and seventeen cents".

To edit an estimate template with the MONEYTOTEXT formula:

1) Edit your desired template (in this example choose a report template that is an estimate or proposal).

2) Right-click on the empty white space and choose **Insert Objects > Formula Field**.

3) Double-click on the new formula field.

4) Click on the *Formula Field* tab.

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

6) Choose a *Character* based output, and click **Next**.

Note: Do <u>not</u> choose a *Numeric* output. If you do, the Template Designer will overwrite the format you set with your formula to a standard Template Designer numeric format.

7) Choose *Basic Formula* and click **Next**.

8) Choose the *Field and Character* formula template, and click **Next**.

9) Choose a field that contains a dollar value. In our example, we are editing an estimate, so we'll choose *JobSetupAmount*.

10) Click **Next**.

11) Click **Finish**.

12) Click **Edit Manually (advanced)**.

13) Edit the formula to be:
MONEYTOTEXT(({Root.JobSetupAmount}))

14) Click **OK**.

15) Click **OK** again.

16) Select your template and print it.

Note: You may wish to put the formula field on your template, then edit the formula properties to *Hide for Print / Preview*, and then reference the formula in an RTF field that contains your contract wording.

OTHER FEATURES

34. New Module: QX Mobile for Pocket PC

Versions: All - will require a separate QX Mobile purchase

QX Mobile revolutionizes the experience for QXpress users. Imagine you and your staff taking a mini-version of QXpress out with you in the field. Unlike the QXDC that was mainly meant as a job costing tool, QX Mobile allows you to take all customer information, history, contact events, and services out with you in the field. You have full read/write capabilities on all data, and can add new customers, services, and items in the field and have it sync back perfectly with QXpress. And get this: QX Mobile can by synced wirelessly in the field, from a cradle in your crew members home, or using a cradle back at the office. Did we mention you can even print estimates, work orders and invoices in the field, as well as capture signatures from your clients?

Note: QX Mobile is designed for Pocket PC devices only, not Palm OS or Blackberry.

To get started, please complete each of the steps outlined:

1) Print the Quick Start Guide found at: http://www.qxpress.com/downloads/QXMobileQuickStart.pdf

2) Follow the steps found in the Quick Start Guide.

3) Contact QXpress Sales at 1.877.529.6659 or sales@alocet.com, and get setup on QX Mobile.

35. Charge Description - Make Inactive

Versions: All

You can now set *Charge Descriptions* to be inactive, so they no longer appear in your list for new services or Job Items.

To make a Charge Description inactive:

1) Click **Lists > Charge Description List**.
2) Click on a *Charge Description* you which to make inactive.
3) Click **Make Inactive**.

To make an inactive Charge Description active again:

1) Click **Lists > Charge Description List**.
2) Change the *Active/Inactive* dropdown list to *Inactive* and click **Filter**.
3) Click on the *Charge Description* you wish to make active again.
4) Click **Make Active**.

36. Charge Descriptions - Filtering

Versions: All

The *Charge Description* list now allows you to use filter options to quickly find *Charge Descriptions*.

To filter the Charge Description List:

1) Click **Lists > Charge Description List**.
2) In the *Charge Description* filter field at the top, type in all or part of a *Charge Description*.
3) In the *Active/Inactive* dropdown list, select whether you want to filter on active *Charge Descriptions* or inactive *Charge Descriptions*.
4) Click **Filter**. All the *Charge Descriptions* that meet that criteria will be shown.

37. Equipment screen - filter options

Versions: All

The *Equipment* screen has filter options on top of the list to help you find *Equipment* faster.

To steps:

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

2) In the *Look for* filter field at the top, type in all or part of the criteria you are filtering on.

3) In the *Search in* dropdown list, select the field you are filtering on.

4) Click **Filter**. Any Equipment that meets your criteria will be listed.

38. Equipment screen - Customer Assignment

Versions: All

Many QXpress users, mostly in the Plumbing and HVAC industries, maintain specific equipment on properties. The new *Customer Assignment* feature allows you to assign a specific piece of equipment to a specific customer, and have this equipment listed in the *Customer* screen.

To assign equipment to a customer:

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

2) Select the equipment you would like to assign to a customer.

3) Click **Go to Selected Equipment**.

4) Click details (...) next to the *Customer Assignment* field.

5) Choose a customer from the dropdown list, and click **OK**.

To view a customer’s equipment in the Customer screen:

1) Click **Tools > Options...**.

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

3) Place a check beside the *Show the Equipment tab in the customer screen* checkbox.

4) Click **OK**.

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

6) Select a customer that has equipment assigned to them.

7) Click **Go to Selected Customer**.

8) Click on the *Equipment* tab.

39. Customer screen - Sorting saved for History & Schedule tabs

Versions: All

When you are in the *Customer* screen, under either the *Schedule* or *History* tab, you can click on a column header to have it sort by that column. In past versions when you edit a service while it is sorted, however, QXpress would reset the sorting back to the original order, causing you to have to resort the list again, find the position you were on, and then edit the next service. In QX6 the sorting will be saved for you, saving you this hassle.

Note: Sorting will be reset to the original order when you change from the *Schedule* or *History* tab to another tab, or if you close and reopen the *Customer* screen.

40. Startup Interview - multiple selection

Versions: All

The Startup Interview gives new users the ability to select multiple industries they are involved in, instead of just one main industry.

41. Customer screen - Sorting of Custom Fields

Versions: All

Custom fields, in the *Customer* screen, of the type 'Dropdown list' now sort alphabetically. Previously they sorted in the order entered.

42. Add / Edit Customer screen - Formatting of phone numbers

Versions: All

When adding or editing a customer, if the phone number begins with 10 digits, the phone number will automatically format to a (###) ###-####.

43. Add / Edit Customer screen - Autofill from Zip / Postal Code

Versions: All

When adding a new customer, try entering in the Zip / Postal Code first. QXpress will check to see if other customers in your database have that Zip / Postal Code, and if so, it will automatically fill in the City, State and Country for you.

SPEED / PERFORMANCE

44. QX Enterprise: NEW VERSION!!

Versions: QX Enterprise

Although, this isn’t a new *feature* of QX6, the major significance of the release warrants a mention in the QX6 feature list. After over two years of development, we are pleased to announce that the Enterprise version is now available! This modified version of QXpress uses Microsoft's SQL Server Desktop Engine for its database. QXpress Enterprise offers medium and large sized service companies a solution with enhanced database stability and superior speed - all while maintaining the ease of use of QXpress. For an example in speed, during our internal tests we found that large databases with multiple users logged in across a network, were able to click **Refresh** in *My Calendar* with about a 1 to 3 second pause time, while Route Lists, Work Orders and Invoices loaded in approximately 2 to 5 seconds with the Template Designer.

To test drive QXpress Enterprise:

Contact your sales rep, or call general sales at 1.877.529.6659 ex 1. They will be able to get you a free test run on Enterprise.

45. Login Form - only appears for users with login permissions

Versions: All

In QX6, the login form only shows if you have setup login permissions in QXpress Platinum. Otherwise, QXpress will simply open using the last database you accessed.

46. Startup Screens - Replaced with Startup Alert

Versions: All

In prior versions of QXpress, you would be prompted by several startup screens asking if you wanted to renew services, reschedule services, create invoices, and compact your database. These prompts have now been consolidated into one new Startup Alert screen making it faster to open QXpress each day.

47. Custom Field in the Customer screen

Versions: All

Scrolling through custom field tabs in the *Customer* screen has been redesigned so that it is significantly faster - especially if there are over 1000 customers in your database.

48. Refresh button in My Calendar speed increase

Versions: All

Databases with over 2000 customers should see a speed increase when you click **Refresh** in *My Calendar*. This is across all versions of QX6, but especially in the new QXpress Enterprise version.

INTERFACE

49. New menu style

Versions: All

When you right-click, or choose from the File/Edit/View/Lists... menus, you'll see menus have a new Windows XP type of style. The new style enables us to use icons for common operations you perform, making it easier for you to navigate throughout QXpress.