

QXPRESS VERSION 7.0 FEATURE LIST

This document lists the main new features included in the QXpress version 7.0 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. QuickBooks 2007 compatibility

Versions: All

QXpress 7.0 has been configured to be compatible with the upcoming release of QuickBooks 2007.

2. Customer's Sales Rep automatically set on new service

Versions: All

When a new service is scheduled, QXpress will look at the QuickBooks customer you are scheduling for to see if there is a Sales Rep assigned to them. If so, it will automatically assign that Sales Rep to the service in QXpress.

3. 'Hide Job Items where Actual Quantity = 0' checkbox

Versions: Gold, Platinum, Enterprise

A new checkbox has been added to the *Inventory Adjustments* screen. We received feedback from users saying that they only wanted to send inventory adjustments on services they were tracking actual quantities on, and as it stood they either could not use the Inventory Adjustments screen in QXpress, or were faced with tracking actual quantities used on every single job. The solution is to allow you to select to ignore inventory adjustments where no actual material usage was entered.

To ignore inventory adjustments for job items that have 0 actual quantity:

- 1) Click **Post To QuickBooks > Inventory Adjustments**.
- 2) In the lower left-hand corner, put a check in the *Hide Job Items where Actual Quantity =0* checkbox.

4. Integration with Item Groups

Versions: Gold, Platinum, Enterprise

QXpress is now compatible with QuickBooks Item Groups. An Item Group is a name given in QuickBooks to a collection of several service, inventory and non-inventory parts, in pre-set quantities. For example, if you were to install “Widget A”, you could make a “Widget A Installation Group” in QuickBooks, comprised of 2 labor hours of the service item “Widget Labor”, 1 unit of the inventory part “Widget A” and 15 feet of the non-inventory part “Wire”.

This is a major feature for HVAC, Plumbing, Electrical Contracting, and Irrigation companies that deal with Flat Rate pricing models.

To schedule a new service using an Item Group:

- 1) In QuickBooks, in the *Item List*, create an Item Group, ensuring that at least one of the items of the Item Group is a service item.
- 2) In QXpress, click **Schedule > New Service**.
- 3) Choose the newly created Item Group.
- 4) In the *Service* screen, click on the *Job Items* tab. You will now see all the items have automatically been placed on the service. You will also see the first service item listed in the Item Group has been used as the parent Charge Description for this service.

To add the contents of an Item Group to an existing service:

- 1) In QuickBooks, in the *Item List*, create an Item Group.
- 2) In QXpress, edit any existing service.
- 3) Click on the *Job Items* tab.

- 4) Click **Add**.
- 5) From the dropdown list in the *Description* column, choose the Item Group you created.
- 6) You will now see all the items have automatically been placed on the service.

Note: Existing QXpress users may have to do a full synchronization between QXpress and QuickBooks by (1) clicking the green QX Sync icon; and (2) then clicking Get new QB Data, in order to synchronize with existing Item Groups for the first time.

Note: While QXpress now recognizes Item Groups, there are two shortcomings: (1) QXpress uses all the items from the Item Group, but discards the actual Item Group name; and (2) QXpress ignores the 'Print items in group' checkbox.

5. Improved trouble reporting on QuickBooks integration

Versions: All

In an effort to help troubleshoot issues with the full QX Sync procedure, all common issues bring up a more informative, detailed message displaying suggested solutions to aid in correcting the problem.

QX Mobile

6. Template Designer template compatibility

Versions: All - requires the QX Mobile module

You are now able to use the majority of templates from Template Designer in QX Mobile, assuming if you have one of the specified printers (see www.qxpress.com/QXMobile for suitable printers).

There are two ways to use a template created in the Template Designer:

(A) For templates to be used by all crews that sync with the Template Designer:

- 1) Open the QX Mobile Server.

- 2) Select the **Advanced > Template Designer** tab.
- 3) There will be 3 dropdown lists. Each will list either work orders/route lists, invoices or estimates. Select the templates you would like to use in QX Mobile. If you'd like to use the default templates on QX Mobile, leave the dropdown list blank.
- 4) Make sure your Pocket PC is in the cradle.
- 5) Click **Synchronize**.
- 6) Start QX Mobile.
- 7) Edit an occurrence of a service by selecting a service in *My Calendar* and clicking **Schedule > Edit Occurrence**.
- 8) Select *Print* from the dropdown list in the top right of the screen.
- 9) Select either *Invoice*, *Work Order* or *Estimate* from the dropdown list. The template selected in step 3 will be used.

(B) For templates to be used from a profile:

- 1) Open the QX Mobile Server.
- 2) Select the *General* tab.
- 3) Select the *Select/Create Profile* option.
- 4) Either select a current profile and click **Edit** or click **Add**, accordingly.
- 5) Select the *Template Designer* tab.
- 6) Select the templates you wish to use for work orders/route list, invoices and estimates for this QX Mobile user's profile.
- 7) When all the information for the profile is created, click **Finish**.
- 8) Continue from Step 5 in the previous (A) section.

7. Create your own Custom Data Entry screen

Versions: All - requires the QX Mobile module

You can now create your own Custom Data Entry screen, which replaces the old Time / Material screen. This allows to collect and display the

information that is relevant to your company on one screen for your field staff! The Custom Data Entry screen can list Equipment, Job Items, Act. Service Times, Act. Material Usages, etc. You will also be able to drag and drop and resize controls. If you do not make any changes to the Custom Data Entry, then the old Time / Materials screen will be used.

To create your own Custom Data Entry screen:

- 1) Open the QX Mobile Server.
- 2) Select the *General* tab.
- 3) Select the *Select/Create Profile* option.
- 4) Either select a current profile and click **Edit** or click **Add**, accordingly.
- 5) Click the second tab. This is most likely called "Custom Data Entry". (This name will be renamed by you in the next step).
- 6) Section 1: Page Layout. You will be allowed to resize the grid area to Portrait or Landscape. You can also name the tab. The name entered here will be the name of the Profile Wizard tab (instead of Custom Data Entry) and will appear in QX Mobile under Schedule.
- 7) Section 2: Tab Information. You can name each of the three tabs in this area. When you start to type, the tab which has focus will change name. Note the tabs will appear at the bottom of the screen in QX Mobile.
- 8) Section 3: Select Type of Control to Add. There are three groupings of controls. Standard, List and Special. Click the Type drop down to see all the different control options you have. For example if Standard Equipment List is selected, you will be able to add a control box that is associated with adding to the Equipment List. List Equipment List will allow a grid to be placed into the tab. Special controls allow you to add a Charge Description to the form. This will be explained in the next section.
- 9) Section 4: Control Properties. Here is where you can add a control to the grid depending on what was selected in Section 3. If Standard Equipment List was selected, then listed under the control drop down in section 4 will appear all the controls that can be added for the Equipment List. Select a control and click Add and you will see the control added to the tab. You can move and resize the control as you wish. To change the label name of the control, click on the control in the tab and then change the value in the Name text box in section 4. If a List *** is selected, then the first option in the control grid will be Add Grid. Make sure this is selected and click Add. You'll see the grid added to the tab. Then you can select the columns in the Control drop down. Once the desired column is selected, click Add. Special controls will have two options in the Control drop down. One will

be ChargeDescriptionDescription and the other EmployeeName. If you select ChargeDescriptionDescription, a drop down control will be added. Select the Charge Description to be associated with this control on the tab. To the left of the added drop down box you'll see a white area, this will be a checkbox to include or exclude this charge description when saving. To the right of the added drop down box there is another white area. This will be the quantity to add to the Charge Description when saving. If EmployeeName is added, then a combo box listing all employees will appear. Here is where you can assign a specific employee for the addition of the Charge Description.

- 10) When the controls are set up to your liking, click **Finish**.

8. Record payments received in the field

Versions: Gold, Platinum, Enterprise + requires the QX Mobile module

You are now able to take detailed payment information in the field for services that have the status On Route or Done.

To receive a payment, perform the following steps:

- 1) Open QX Mobile.
- 2) Select a service from *My Calendar*. Make sure the service is OnRoute or Done.
- 3) Click **Schedule > Edit Occurrence**.
- 4) In the top right there select *Payment* from the dropdown list.
- 5) Enter desired payment information.
- 6) Click **Save**.
- 7) The next time you synchronize in QX Mobile Server, the payment will be entered into QXpress, and will appear in the *Job Items* tab for the service. When you create an invoice for the service in QXpress, the payment will be entered into QuickBooks.

9. Take photographs, such as before and after pictures

Versions: Gold, Platinum, Enterprise + requires the QX Mobile module + requires a Pocket PC with Windows Mobile 5.0 or higher with a camera.

You are now able to take pictures in the field for services, that get inserted into contact manager events in QXpress.

To add a picture to a contact event, perform the following steps:

- 1) Open QX Mobile.
- 2) Click **Customer > Customer List**.
- 3) Select a customer.
- 4) Click **Go to Customer**.
- 5) In the top right dropdown list, select *Contact Event*.
- 6) Fill out the information for a new contact. You'll see a button called **Take** (you may have to scroll down).
- 7) Capture the picture as you would regularly. The screen should close by itself. If not, click **OK** in the top right.
- 8) The picture will be stored with this contact. Click **Save** to save the contact.
- 9) The next time a synchronization is complete, the picture taken will be transferred to the desktop and associated with the contact event.

10. Enter vendor bills & purchase orders in the field

Versions: Gold, Platinum, Enterprise + requires the QX Mobile module

You are now able to create Vendor Bills and P.O.s in QX Mobile. If you have QX Mobile Server properly set up, you may also synchronize remotely with your desktop and receive back the P.O. number assigned by QuickBooks while still in the field.

To create a vendor bill or purchase order perform the following:

- 1) Start QX Mobile on the Pocket PC.
- 2) Select a service that is OnRoute or Done.
- 3) Select **Schedule > Edit Occurrence**.
- 4) Select *Act. Material Usage* from the top right dropdown list.

- 5) Click **Create Bill/P.O. for materials purchased in field...**
- 6) Select whether you are creating a Vendor Bill or P.O. Number.
- 7) Select the information in the controls listed.
- 8) Click **Tools > Add Job Item** to add Job Items to the Vendor Bill or P.O. Number.
- 9) Select the Charge Description you wish to add from the Charge Description List and fill out the desired information.
- 10) Click **Add**.
- 11) Repeat steps 9 and 10 for each Charge Description you wish to add. When complete, click **Back**.
- 12) You'll be back to the Create Vendor Bill/P.O Number screen.
- 13) Click **Save Options > Save** to save the Vendor Bill / P.O. Number.
- 14) If you are adding a P.O. Number, have wireless services active on your pocket pc, QuickBooks is open on your desktop and QX Mobile Server is set up properly to listen for incoming request, you will be able to retrieve the P.O. Number assigned by QuickBooks. To do this click Save Options > Save & Sync. You'll see the progress of the request in the top of the screen. If the service cannot be synchronized, the information will still be saved on your PDA and will be synchronized next time you synchronize with the desktop via the cradle.

11. Add Equipment to a Customer

Versions: Gold, Platinum, Enterprise + requires the QX Mobile module

You are now able to add a equipment to a specific customer in the field.

To add equipment to a specific customer perform the following steps:

- 1) Open QX Mobile on the Pocket PC.
- 2) Select **Customer > Customer List**.
- 3) Select the customer you wish to add an new equipment for.
- 4) Select **Go to Customer**.

- 5) Select *Equipment* from the dropdown list in the top right corner.
- 6) Fill in the information for the new equipment.
- 7) Click **Save**.
- 8) Your new equipment for this customer will be listed in the bottom of the screen.

12. Send Email to Customer

Versions: Gold, Platinum, Enterprise + requires the QX Mobile module

You can now send an email to a customer if a service is listed in *My Calendar*. The process works along similar lines as calling a customer from QX Mobile.

To send an email to a customer:

- 1) Open QX Mobile on the Pocket PC.
- 2) Select a service from the My Calendar (if nothing appears make sure at least one service is listed in QXpress in *My Calendar* and then synchronize with QX Mobile Server).
- 3) Select **Customer > Email XXX** (where XXX is the customer's email). If you don't see an email address, then you can enter an email address for the customer within QX Mobile. The next time you synchronize, the email address will be entered into QXpress and QuickBooks.
- 4) Enter the information to send the email.

To set default subject and body information when sending email:

- 1) Open QX Mobile on the Pocket PC.
- 2) Click **Activities > Preferences**.
- 3) Select *Internet*, in the top right corner.
- 4) Under *Default Email Subject* and *Default Email Body*, enter the desired information.
- 5) Click **Save**.

SCHEDULING

13. Crew Vocabulary

Versions: All

You can now rename the “Crew” in QXpress to one of the following choices: “Crew”, “Room”, “Team”, “Tech” or “Truck”.

To change the Crew Vocabulary:

- 1) Click **Edit > Preferences**.
- 2) Click on the *Routing & Scheduling* tab.
- 3) Make a selection from the *Crew Vocabulary* dropdown list.
- 4) Click **OK**.
- 5) You will have to close and then re-open QXpress for all changes to take place.

14. Crew Number no longer used

Versions: All

In prior versions of QXpress, each Crew had a designated 3 letter *Crew Number* and a 30 character *Crew Name*. This has now been changed so that there is only the 30 character *Crew Name* shown in QXpress, and the *Crew Number* is no longer used.

All existing databases will be upgraded so the new *Crew Name* will be a combination of the old *Crew Number* plus the old *Crew Name*. You can rename your crews to remove the number if you prefer.

15. Blackouts for Crew Availability (Day / Week View)

Versions: All

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

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

To block off crew availability:

- 1) Click **Lists > Crews**.
- 2) Choose the crew you want to block availability for from the *Crew Name* dropdown list.
- 3) Click **Block Availability**.
- 4) Click **Add**.
- 5) Choose the From and To date range you wish to block.
- 6) Choose the times you wish to block.
- 7) Select which days of the week you wish to block.
- 8) Enter a reason for the lack of availability, such as 'Vacation', 'doesn't work Wednesdays', etc.
- 9) Select any additional crews you wish to block availability for.
- 10) Click **OK**.
- 11) Click **OK**.
- 12) Click **OK**, to return to My Calendar.

To edit a blocked-off crew availability:

- 1) Double-click on the black area on the calendar representing the blocked-off crew availability.
- 2) Make any edits as necessary.
- 3) Click **OK**.

16. Customer Services List

Versions: All

A new screen has been added that lists all the services scheduled for all customers. This is designed to be especially useful for companies looking for a list of all outstanding estimates, or all ongoing projects.

To turn the Customer Services List feature on / off:

- 1) Click **Edit > Preferences**.
- 2) Click on the *Routing & Scheduling* tab.
- 3) Set your preference for the *Enable Customer Services list* checkbox.

To open the Customer Services List:

- 1) Click **Lists > Customer Services List**.
- 2) From the *Show* dropdown list, select the filter you want to place on this list. For example, if you wanted a list of all projects with an 'Estimate' status, select "Estimate: Project".

17. More advanced defaults for recurring services

Versions: All

You can now set additional default values for recurring services, such as Max visits, Min days between visits, Basis, and Allow days.

To set advanced defaults for a Charge Description:

- 1) Click **Lists > Charge Description List**.
- 2) Click on the Charge Description you want to set advanced defaults for.
- 3) Click **Advanced**.
- 4) Click on the *Advanced* tab.
- 5) In the *Advanced Options for Recurring Services* frame, set the advanced properties you desire.

- 6) Click **OK**. Any recurring service scheduled from this point forward for this Charge Description will now have your advanced default settings.

18. Unlimited 'Job Kinds'

Versions: All

In prior versions of QXpress, you were limited to 3 Job Kinds. In addition to these original 3 Job Kinds, you can now add unlimited Job Kinds of your own.

To add / edit Job Kinds:

- 1) Click **Lists > Charge Description List**.
- 2) Click anywhere inside the *Job Kinds* column.
- 3) Choose "Edit" from the dropdown list in the *Job Kinds* column.
- 4) Click **Add**.
- 5) Type the name for your new *Job Kind*.
- 6) Double-click on the black color to set a new color for this *Job Kind*.
- 7) Click **OK**.

Note: Only the original 3 Job Kinds can be used for Zone based scheduling, and have the specialized tracking for *Last Job Kind Date* (found under the *Routing & Invoicing* tab in the *Customer* screen).

19. "Day: time on top" and "Week: time on top" views

Versions: All

In addition to List, Day, Week, Month and Cust views, there are two new views added. The "Day: time on top" and "Week: time on top" views are recommended for companies that have more than 5 crews, as they provide an easier way to see many crews in the calendar.

To turn on the 'Time On Top' views:

- 1) Click **Edit > Preferences**.
- 2) Click on the *Day View* tab.
- 3) Place a check in the *Show 'Time On Top' view options* checkbox.
- 4) Click **OK**.
- 5) In My Calendar, you'll the Day and Week views renamed to "Day: time on left" and "Week: time on left, respectively. You'll also see the new "Day: time on top" and "Week: time on top" views available.

20. Service-level custom fields in List View

Versions: Gold, Platinum, Enterprise

In prior versions of QXpress, you could only see service-level custom fields in the Day or Week view. In QX7 you can now add these fields as columns to the List view of My Calendar.

To make service-level custom fields available in List view:

- 1) Click **Edit > Preferences**.
- 2) Click on the *List View* tab.
- 3) Place a check under the *Show?* column beside the custom field you want to have shown in My Calendar.
- 4) Click **OK**.

Note: Including custom fields at the service level can cause a decrease in speed / performance.

Note: The icons of the custom field dropdown lists will not show in List View.

JOB COSTING

21. Vendor Bills & Purchase Orders

Versions: Gold, Platinum, Enterprise

In past versions of QXpress, it was assumed that materials were not bought for a specific service for a specific customer, rather that materials were taken from a large stockpile of inventory. This posed a problem for service companies that purchased materials in the field at the time of service, since double-entry had to be made, once for either the Vendor Bill or Purchase Order in QuickBooks, and then again in the *Act Mat. Usage* tab in QXpress.

To solve this problem, you can now create Vendor Bills or Purchase Orders for materials directly from the *Act. Mat. Usage* tab in QXpress. The Vendor Bill or Purchase Order gets posted into QuickBooks instantly, and the resulting materials get entered into the *Act. Mat. Usage* tab and *Job Items* tab.

To enter a Vendor Bill or Purchase Order:

- 1) Edit the occurrence of any service (i.e. do not edit the series of a recurring service).
- 2) Click on the *Act. Mat. Usage* tab.
- 3) Click **Create Bill / P.O. for materials purchased in the field.**
- 4) Select whether you want to create a Vendor Bill (i.e. you have already received the bill from the Vendor), or a Purchase Order (i.e. the Vendor will send you a bill at a later date and the bill will match a Purchase Order Number you provide).
- 5) Go through each of the fields and make the appropriate selection, if applicable.

Note: In the case of a Purchase Order, the Purchase Order Number will be assigned automatically once you post the Purchase Order to QuickBooks, as QuickBooks will provide you with the next sequential Purchase Order Number.

- 6) In the grid below, list all the Charge Descriptions for the items you are purchasing. Only Inventory and Non-Inventory Parts will be listed.

- 7) Click **Post Vendor Bill | Purchase Order to QuickBooks**.
- 8) You will return to the *Act. Mat. Usage* tab with the quantities purchased entered automatically.

INVOICING

22. 'Payment collected at time of service' in Job Items tab

Versions: Gold, Platinum, Enterprise

Many service companies collect a payment from the customer at the time of service. In prior versions of QXpress, users would typically have to first post over invoices at the end of the day, and then go through all the payments received and post the payments into QuickBooks directly. For these types of service companies, this was cumbersome since it meant processing each service twice, once in QXpress for the invoice and once QuickBooks for the payment.

The new 'Payment collected at time of service' feature solves this problem by quickly and easily allowing you to enter the payment into QXpress when you are making any other edits to the service.

To enter a 'Payment collected at time of service':

- 1) Edit the occurrence of any service (i.e. do not edit the series of a recurring service).
- 2) Click on the *Job Items* tab.
- 3) In the lower left-hand corner, place a check in the *Payment collected at time of service* checkbox.
- 4) Enter the *Amount*, *Pmt. Method* and *Deposit To* values.
- 5) Finish any other edits to the service. When you are finish editing the service, click OK, or click on the *Quick Invoice* icon. The payment will get posted in QuickBooks once the invoice gets posted from QXpress to QuickBooks.

Note: For your convenience, QXpress will memorize the relationship between the *Pmt. Method* and *Deposit To*, so that the next payment you receive will have the *Deposit To* automatically filled in based on the *Pmt. Method*.

23. Quick Invoice - create and post invoices directly from service

Versions: Gold, Platinum, Enterprise

For many companies that use 'Invoice Upon Completion' invoicing, the process to create a batch of invoices to send from QXpress to QuickBooks can be seen as cumbersome. This is especially the case when most services need to be edited at the end of the day.

For this reason, the Quick Invoice feature cuts out many unnecessary steps, and is more intuitive for those who just want to edit a service, put in times, materials, and payments received in the field, and post the service as an invoice to QuickBooks, all in one convenient step.

To use the Quick Invoice feature:

- 1) Edit the occurrence of any service (i.e. do not edit the series of a recurring service).
- 2) After making any final edits to the service in the *Service* screen, click on the Quick Invoice icon to the right of the Activities button.
- 3) Set any preferences in the *Quick Invoice - Generate & Post to QuickBooks* screen.
- 4) Click **Generate & Post to QuickBooks**.
- 5) The service will automatically be set to the status of 'Done', an invoice will be created, and then posted to QuickBooks. Also, if you entered a 'Payment collected at time of service', the payment would get posted at this time as well.

TEMPLATE DESIGNER

24. Update email addresses from Email Templates screen

Versions: All

In prior versions of the Template Designer, there was a lot of confusion as to where the email addresses were coming from when emailing invoices, work orders or route lists from QXpress. When emailing invoices the email address comes from the customer's email address in QuickBooks. When

emailing work orders and route lists, the email address comes from the Crew Leader's email address in QuickBooks. But because this was not obvious, a lot of users found themselves always entering the email address every time they emailed templates.

To make this more convenient and intuitive, the Template Designer now prompts you if you want to update any email address entries, and will attempt to update QuickBooks directly with the updated email address.

To demonstrate this new feature:

- 1) Make sure you have a service scheduled in today's calendar.
- 2) Take note of the crew this service has been assigned to.
- 3) Click **Lists > Crews**.
- 4) Choose the crew from the *Crew Name* dropdown list.
- 5) Ensure there is an employee chosen in the *Crew Leader* dropdown list.
- 6) Click **OK**.
- 7) In *My Calendar*, click **Print > Print Work Orders / Route Lists**.
- 8) Choose your route list or work order template, and click **OK**.
- 9) In the *Print Preview* screen, click **Send Email**.
- 10) In the *Select forms to email* screen, click **Edit Email**.
- 11) Type in a new email address into the *To* field.
- 12) Click **OK**.
- 13) Ensuring QuickBooks is open, click Yes to any prompts that ask you to update the email address in QuickBooks.

CONTACT MANAGER

25. Contact Events appear in Day / Week view

Versions: Gold, Platinum, Enterprise

Contact manager events can now appear as appointments in the Day and Week view of *My Calendar*.

The follow criteria have to be met for a Contact Manager Event to appear in *My Calendar*:

- 1) You must be in either Day or Week view.
- 2) The Contact Manager Event must be assigned to an Event Status that the 'Remind Me' turned on.
- 3) The Contact Manager Event must be assigned to an employee.
- 4) The employee must be the same employee that is the Crew Leader of a crew visible in *My Calendar*.

Note: The Contact Manager Events will always appear as a 30 minute appointment.

26. New filter options on Contact Events list

Versions: Gold, Platinum, Enterprise

The Contact Manager now has more user-friendly filtering options that are similar to the filter options found in other QXpress screens. There are 6 dropdown lists that represent each of the fields that you can quickly filter on. If you prefer, you still have the advanced filter options that were previously available in the Contact Manager.

27. New 'Related Service' field for Contact Events

Versions: Gold, Platinum, Enterprise

There is a new field available for Contact Manager Events, the *Related Service* field. Once you select a customer, the *Related Service* dropdown list will populate with all the services for that customer. The purpose is to track conversations and reminders that pertain to a specific service, such as follow ups on estimates given to customers.

INTERFACE

28. Home & Learning Center

Versions: All

The *Home & Learning Center* is the new opening screen for QXpress users. It is meant to (i) give users an overview of tasks that need to be performed; and (ii) give new users an easier way to learn and understand QXpress.

To change the QXpress opening screen:

- 1) Click on the *Home* icon in the QXpress toolbar.
- 2) Under the *Setup / Options* frame, select whether you want your opening screen to be *My Calendar* as it was in prior versions of QXpress, or the *Home & Learning Center* as the new default of QXpress.

29. Customer Screen has a QuickBooks 2006 look

Versions: All

The *Customer Screen* has been slightly redesigned to have a more QuickBooks 2006/2007 look, and includes the new Edit Customer.

30. Multi-window

Versions: All

The *Customer*, *Equipment*, *Charge Description List*, *Service*, *Service List*, *Invoice List* and *Contact Manager* screens can now remain open while you work in other areas of the program. This, to many QXpress users, could be the single biggest new feature introduced by QX7.

31. Show separately in Windows Task Bar option

Versions: All

As the *Customer, Equipment, Charge Description List, Service, Service List, Invoice List* and *Contact Manager* screens are opened, a new window is opened in the Windows Task Bar, allowing you to quickly go back and forth between the open screen and the *My Calendar* screen. Depending on your personal preferences, this may not be desirable, however, as you may not want may different screens showing in your Windows Task Bar.

To Show or Hide screens separately in the Windows Task Bar:

- 1) Click **Edit > Preferences**.
- 2) Click on the *General* tab.
- 3) In the *Display* frame, set your preference for the *Show open screens separately in Windows Task Bar* checkbox.
- 4) Click **OK**.

Note: Setting this preference will not affect screens already opened, i.e. if a screen is already open and this preference is change to be unchecked, the screens will not automatically hide until next time they are opened.

32. Invoice Types renamed

Versions: All

Type 2,3,5 and 6 invoicing types have been renamed to be more intuitive. The new names are “2 - Print: Before you go”, “3 - Print: Upon Completion”, “5 - Email: Before you go”, “6 - Email: Upon Completion”, respectively.

33. Ability to choose toolbar icons

Versions: All

You can now select which of the preset icons are visible in the QXpress toolbar.

To show or hide toolbar icons:

- 1) Click **Edit > Preferences**.
- 2) Click on the *General* tab.
- 3) Under the *Display* frame, select which *Toolbar Icons* you want visible.

Note: There are no features for hiding the *Home*, *Calendar* and *QX Sync* icons, as well there are no features for adding your own additional icons.

OTHER FEATURES

34. Ability to hide Zone-based and Job Packages scheduling

Versions: Gold, Platinum, Enterprise

Zone-based scheduling is used mainly by companies that have services scheduled on no-specific date, a long time in the future. Only a few industries, however, actually use this feature, and therefore creates confusion for users who will never use it. New users will now find that unless they selected *Lawn & Tree Spraying*, or *Irrigation* in the *Startup Interview*, the *Zone-based scheduling* and *Job Packages* will be hidden.

To show / hide Zone-based scheduling and Job Packages:

- 1) Click **Edit > Preferences**.
- 2) Click on the *Routing & Scheduling* tab.
- 3) Place a check or remove the check from the *Show Zone Based as a scheduling option?* checkbox, depending on your preference.
- 4) Place a check or remove the check from the *Show Job Packages as a scheduling option?* checkbox, depending on your preference.

Note: You may need to close and reopen QXpress for some of these changes to take effect.

35. Spell check for job instructions and long charge description

Versions: All + requires Microsoft Word 2000 or later

QX7 now has a spell checking feature for Job Instructions and Long Charge Descriptions.

To use the spell checking feature:

- 1) Edit any service.
- 2) Under the *General* tab, make sure you have some instructions in the *Instructions for Crew* field.
- 3) Click the “ABC” icon to the right of the *Instructions for Crew*. If there are no spelling mistakes or suggestions, no screen will appear. If there are spelling mistakes or suggestions, a Microsoft Word spell check window will appear to walk you through spelling corrections.

XORA compatibility

36. Integration with XORA on GPS-enabled Nextel phones

Versions: QXpress Gold, Platinum, Enterprise

XORA is a software application that is used on Nextel GPS-enabled mobile phones. The software allows your staff to track start and stop times, crew instructions, and set services to complete - while all the while collecting GPS locations.

By integrating with XORA, QXpress will send your list of services to your Nextel phone, where your staff can record their start and stop times. These times can then be downloaded back into QXpress.

The nice thing about this is your staff have a very simple interface and use the same Nextel phone they are using now.

It is not quite as powerful a mobile program as what QX Mobile will offer you, as it does not have your entire customer database, the ability to add jobs on the fly, the ability to track signatures, payments, material usage or print in the field, but it is the perfect option for someone looking for a simple way to eliminate paper work both for the field and office staff.

To get more information on XORA:

- 1) Contact info@alocet.com and request more information regarding XORA.