



QX Data Collector

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QX Data Collector[™]

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QX Data Collector

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This manual will describe the installation, setup and use of the QX Data Collector (QXDC). To ensure complete and proper use of the QXDC, it is strongly encouraged that you read through all of the sections before you beginning to work with the product.

The QXDC is the most advanced PDA software available in the industry. It enables users to job cost with unmatched accuracy. The QXDC also provides users with client and work history information out in the field - putting the power of information in your hands. And with this information, companies are empowered to make more profitable decisions and, in turn, achieve strategic business advantage.

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Section One

Installing the QXDC

This chapter will explain how to install the QXDC program onto your Desktop and PDA. Once the installation is complete, the QXDC will be fully functional.

The topics presented in this section are:

- Installing the QXDC from CD
- Installing the QXDC from the Internet
- Installing Updates for the QXDC from the Internet

Installing the QXDC from CD

If you have received an Alocet CD containing the QXDC software, installation from that CD is recommended. To install the QXDC from CD, follow the steps outlined below.

- 1) Insert CD into CD-ROM.
- 2) Click **Start** on Windows 95 / 98 / ME / 2000 toolbar.
- 3) Click on **Run**.

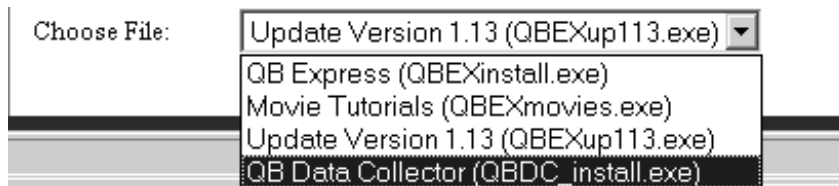


- 4) Type **D:/** (or replace **D** with the letter corresponding to your CD-ROM drive).
- 5) Type the **Enter** key on the keyboard.
- 6) Click on the *QXDC Install* icon.
- 7) Follow the prompts through the setup.

Installing the QXDC from the Internet

In the event that an Allocet CD is not available, it is possible to download the software from Allocet's website on the Internet. To install the QXDC from the Internet, follow the steps outlined below.

- 1) Go to www.qbexpress.com.
- 2) Click on **Downloads**.
- 3) Fill out all of the boxes listed.
- 4) At the bottom of the page, click on the drop-down list in the *Choose File* box and select *QB Data Collector (QXDC_install.exe)*.

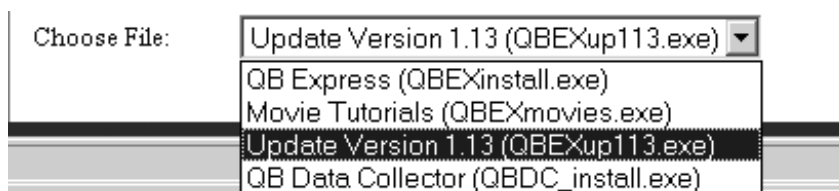


- 5) Click on **Download Now**.
- 6) The *File Download* screen will appear. Click on *Run this program from its current location*.
- 7) Click on **Ok**.
- 8) The *Security Warning* screen will appear. Click on **Yes**.
- 9) Follow the prompts throughout the setup.

Installing Updates for the QXDC from the Internet

All updates to QXDC software will be available for download on the Internet. Users will want to keep current with all updates to ensure that they are working with newest version of QXDC. To download updates from the Internet, follow the instructions below.

- 1) Go to www.qbexpress.com.
- 2) Click on **Downloads**.
- 3) Fill out all of the boxes listed.
- 4) At the bottom of the page, click on the drop-down list in the *Choose File* box and select *Update Version x.xx (QBEXupxxx.exe)*.



Note: In step 4, x is in place of the update version number. For instance, *Update Version 1.01*.

- 5) Click on **Download Now**.
- 6) The *File Download* screen will appear. Click on *Run this program from its current location*.
- 7) Click on **Ok**.
- 8) The *Security Warning* screen will appear. Click on **Yes**.
- 9) The update has now been installed on your computer.

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Section Two

Downloading Route Lists to QXDC

This chapter will explain how to download route lists from QXpress to the QXDC. Once the download has occurred, all of the route list information will be available in the QXDC.

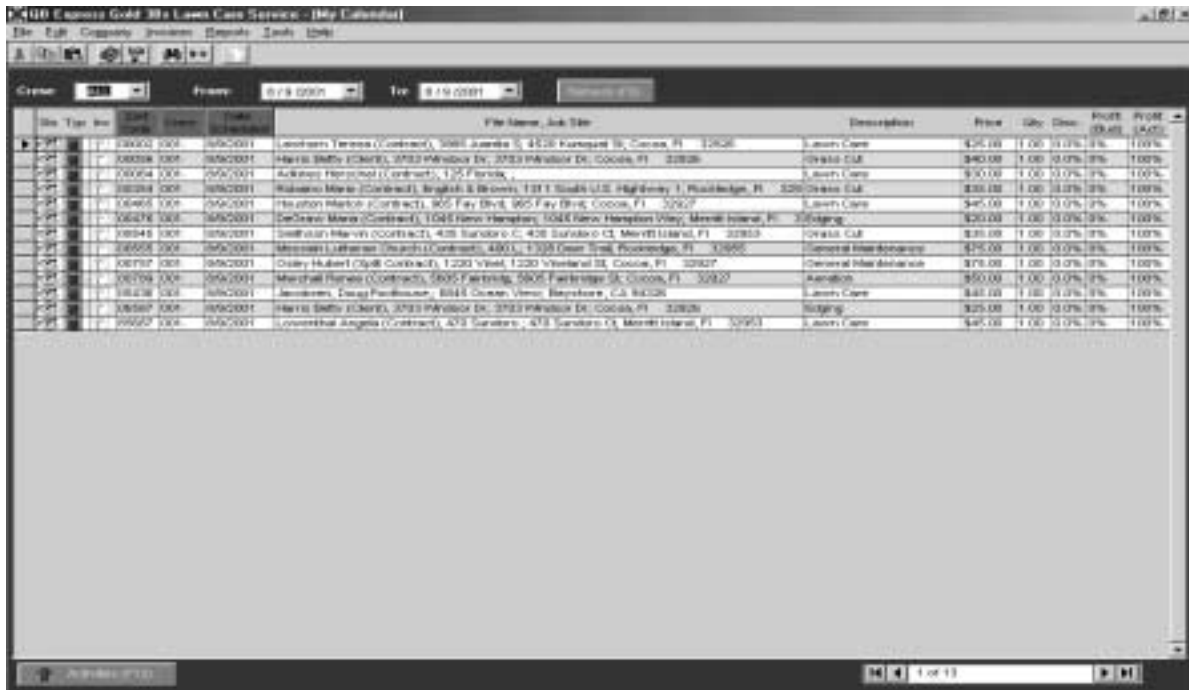
The topics presented in this section are:

- Downloading Route Lists
- Viewing Route Lists in QXDC

Downloading Route Lists

To download the route list to a PDA, follow the steps outlined below.

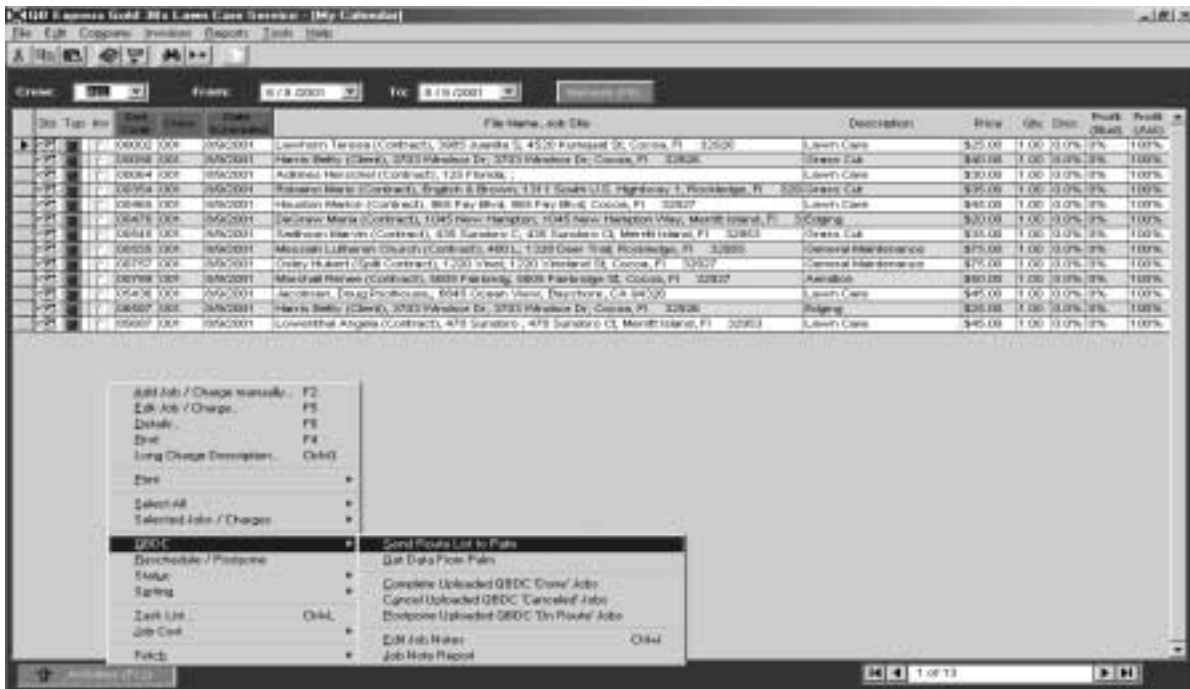
- 1) In QXpress, go to *My Calendar*.



- 2) Make sure all of the jobs that will be downloaded to a PDA have the status of *On Route List*.

Note: To check if the jobs have a status of *On Route List*, hover the cursor over the *Sts* column of one of the jobs. The status of the jobs will appear. If the jobs do not have the status of *On Route List*, highlight the jobs that will be downloaded to the PDA and click **Activities > Status to On Route List**.

- 3) Click on the drop-down list in the *Crew* box at the top of the screen and select the appropriate crew.
- 4) Click on **Activities > QXDC > Send Route List to Palm**.

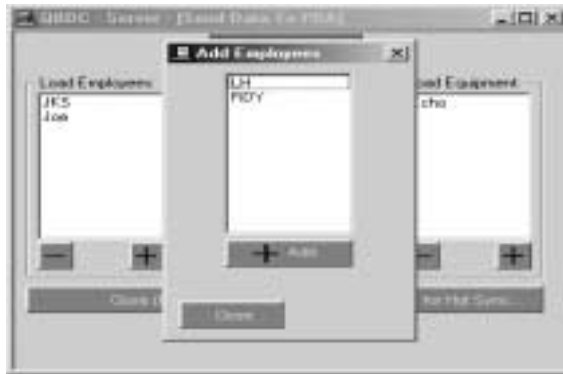


5) The *QXDC Server - [Send data to PDA]* screen will appear.



- 6) To add employees to the QXDC information:
 - i) Click on the “plus” button below *Load Employees*.

ii) The *Add Employees* screen will appear.



Note: All of the employees assigned to the crew whose work is being downloaded will appear. For example, if *Crew 1*'s work is being downloaded, all employees on *Crew 1* will appear. To add or remove employees from a crew, go to **Company > Crew Setup** in LM.

Note: For employees to appear on the *Add Employees* screen, they must be given a *Shortname*. Shortnames replace the employees' full name on the PDA. To assign each employee a shortname, go to **Employees > Employees Form**. Enter the shortname into the box labelled *3-character Shortname*.

- iii) Click on the employee that you would like to add to the QXDC information and click **Add**.
- iv) Repeat step three for each employee that you would like to add to the QXDC information
- v) Click on **Close**.

7) To add clients to the QXDC information:

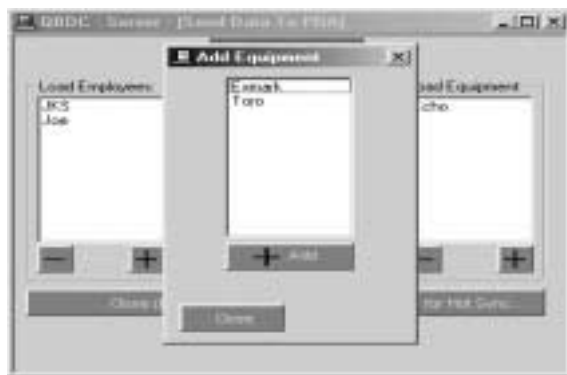
- i) Click on blue “arrow” button below *Load Address & History*.



- ii) Indicate the clients that will be added to the QXDC information by selecting either *Load No Clients*, *Load only Today's Clients*, *Load only Specific Zones* or *Load All Clients*.
- iii) Indicate the job history that will be added to the QXDC information by selecting either *No Job History*, *Last 5 Job Dates*, *Last 10 Job Dates*, or *Last 20 Job Dates*.
- iv) Indicate the material history that will be added to the QXDC by selecting *Include No Materials* or *Include Materials*.

8) To add equipment to the QXDC information:

- i) Click on the “plus” button below *Load Equipment*.
- ii) The *Add Equipment* screen will appear.



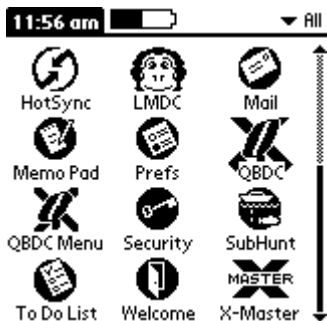
Note: All of the equipment assigned to the crew whose work is being downloaded will appear. For example, if *Crew 1*'s work is being downloaded, all equipment assigned to *Crew 1* will appear. To assign or unassign equipment to a crew, go to **Company > Equipment** in LM. Enter the appropriate crew into the *Crew Assignment* box.

- iii) Click on the equipment that you would like to add to the QXDC information and click **Add**.
 - iv) Repeat step three for each piece of equipment that you would like to add to the QXDC information
 - v) Click on **Close**.
- 9) Click on **Prepare Data for Hot Sync...**
- 10) When prompted to do so, press the *HotSync* button on your PDA's cradle.
- 11) A message will appear on both your monitor and on your PDA when the *HotSync* is completed.

Viewing Route Lists in QXDC

Once the route list has been downloaded, the user will want to view the route list to gather information. To view the route list in QXDC, follow the steps outlined below.

- 1) Go to the PDA's main menu.



- 2) Click on the **QXDC Menu**.
- 3) The *Data Collector* screen will appear. Click on **Job List**.



- 4) The route list will appear showing all of the job sites in order of sort code.

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Section Three

Viewing Information in QXDC

This section explains how to view the client and job information stored in the QXDC. After completing this section, it will be quick and easy to find specific information in the QXDC.

The topics presented in this section are:

- Viewing Route List Information
- Viewing Client and Job History Information

Viewing Route List Information

Route list information includes all of the information for jobs being done that day. Route list information includes job site address, telephone number, services to be provided, job notes and time/material estimations. The subsections will explain how to find specific route list information.

Job Details

To view the details of a specific job on the route list, follow the steps outlined below:

- 1) Click on the *QXDC Menu* icon.
- 2) The *Data Collector* screen will appear. Click on the *Job List* icon.

Data Collector



Job List



**Address
& History**

- The *Job List* screen will appear. The job sites scheduled for the day are shown in order of sort code.

JobList		About
No	Site	Status
1	45 Blythwood Dr.,	OnRout
2	89 Univeristy Av.,	OnRout
3	14 Britshead Rd.,	OnRout
4	14 Franky Rd.,	OnRout
5	41 Tiger Drive,	OnRout
6	3 Strathgowen Ave.,	OnRout
7	124 Flyerdropper Rd.	OnRout
8	34 Lion Blvd, Houston	OnRout
9	14 Bramear Circle,	OnRout

(New) (Detail) (Time) (Material)

- Click on the specific job site.
- Click on the **Detail** button at the bottom of the screen.
- The *Job Info* screen will appear. The client's job description, job site, status of the job, name and phone number will be displayed. As well, a list of tasks for the job is shown.

Job Info		History	
Title:	Grass Cut		
Site:	5647 Cypress Hill Rd, Bayshor.		
Status:	▼ OnRoute		
Name:	Kristy Abercrombie		
Phone:	415-555-6579		
Tsk#	Title	Est. Time	Status
1	Mow-Ride	1.00	Pending
2	Blow-BPac	0.25	Pending
3	Inspection	0.17	Pending

(New Tsk) (Tsk Info) (Note) (Done)

- When you have finished viewing the information, click on the **Done** button at the bottom of the screen to return to the previous screen.

Job Notes

Job notes include any instructions that have been entered by the office concerning a specific job. For example, a crew may need to be reminded about closing a gate when they leave Mrs. Smith's job site - this would be a job note. To view job notes for a job, follow the steps outlined below.

- Go to the *Job List* screen.
- Click on the specific job site.
- Click on the **Detail** button at the bottom of the screen.
- The *Job Info* screen will appear. Click on the **Note** button at the bottom of the screen.

- 5) The *Job Note* screen will appear. Any job notes will be displayed under the heading *Instruction*.

Instruction:
Only service the front lawn.

Job Note:
Ms. Ambercrombie asked to be
signed up for an aeration.

Done

- 6) When you have finished viewing the information, click on the **Done** button at the bottom of the screen to return to the previous screen.

Task Notes

Task notes include any instructions that have been entered by the office concerning a specific task. To view task notes for a task, follow the steps outlined below.

To view task-specific notes:

- 1) Go to the *Job List* screen.
- 2) Click on the specific job site.
- 3) Click on the **Detail** button at the bottom of the screen.
- 4) The *Job Info* screen will appear. Click on the **Task Info** button at the bottom of the screen.
- 5) The *Task Title* screen will appear. The task index, task title, estimated time and task status will be displayed.

Instruction:
Do not blow leaves into the pool.

Note:
Blower needs to be serviced.

Done

- 6) When you have finished viewing the information, click on the **Done** button at the bottom of the screen to return to the previous screen.

Viewing Client and Job History Information

The QXDC enables the user to recall client and job history information from the PDA. Client information includes name, phone numbers, addresses etc. Job history information includes the past dates of service, materials used, balance owing etc.

Job History for Clients on Route List

To view job history information for a client on the route list, follow the steps outlined below.

- 1) Go the *Job List* screen.
- 2) Click on the specific job site.
- 3) Click on **Detail**.
- 4) The *Job Info* screen will appear. Click on **History** in the top right-hand corner of the screen.

Job Info		History	
Title:	Grass Cut		
Site:	5647 Cypress Hill Rd, Bayshor		
Status:	▼ OnRoute		
Name:	Kristy Abercrombie		
Phone:	415-555-6579		
Tsk#	Title	Est. Time	Status
1	Mow-Ride	1.00	Pending
2	Blow-BPac	0.25	Pending
3	Inspection	0.17	Pending

(New Tsk) (Tsk Info) (Note) (Done)

- 5) The *Job History* screen will appear. The job description, date and materials will be displayed.

Recent Job History		
06/01/01	001	Flower Planting (Mat
		-F-R 100 Flat
05/01/01	001	Shrub Pruning

(Done)

Information for Clients not on the Route List

To view information on a specific client not included on the route list, follow the instructions outlined below.

- 1) Go to the PDA's main menu.
- 2) Click on the **QXDC Menu**.
- 3) The *Data Collector* screen will appear. Click on **Address & History**.
- 4) The *Address* screen will appear. A list of the clients that you selected to be included on the QXDC will be displayed in alphabetical order.



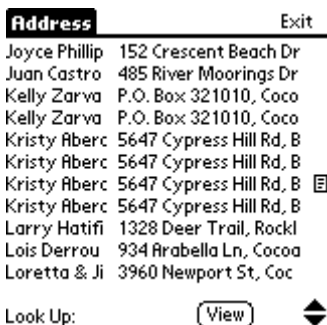
- 5) Click on the specific client. The *Address View* screen will appear. The client's name, address, phone number, property size, zone and current balance will be displayed.



Job History for Clients not on the Route List

To view a client's job history, follow the steps outlined below.

- 1) Go to the *Address* screen. A list of the clients that you selected to be included on the QXDC will appear in alphabetical order.



- 2) Click on the *Job History* icon to the right of the client's name.
- 3) The *Job History* screen will appear. The job description, date and materials will be displayed.

Recent Job History

06/01/01 001 Flower Planting (Mat
-F-R 100 Flat
05/01/01 001 Shrub Pruning

Done

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Section Four

Making Entries into QXDC

This section explains how to use the QXDC to track job cost information including labor, material and overhead costs.

This topics presented in this section are:

- Timing a Job
- Entering Material Usage
- Adding a New Task
- Entering Job Notes
- Entering a New Job in the Field

Timing a Job

The QXDC makes it possible to time jobs and tasks. Jobs include descriptions such as *lawn cut*, *spring clean up*, or *aeration*. Tasks are the individual components of work that make up the job. Examples of tasks may include *cutting*, *trimming* and *inspection*. Whether it is jobs or tasks that the user is timing, follow the steps outlined below to make all timing entries.

- 1) Go to the PDA's main menu.
- 2) Click on the **QXDC Menu**.
- 3) Click on **Job List**.
- 4) The *Job List* screen will appear. The route list display all of the job sites in order of sort code.



No	Site	Status
1	45 Blythwood Dr.,	OnRout
2	89 Univeristy Av.,	OnRout
3	14 Britshead Rd.,	OnRout
4	14 Franky Rd.,	OnRout
5	41 Tiger Drive,	OnRout
6	3 Strathgowen Ave.,	OnRout
7	124 Flyerdropper Rd.	OnRout
8	34 Lion Blvd, Houston	OnRout
9	14 Bramear Circle,	OnRout

(New) (Detail) (Time) (Material)

- 5) Click on the specific job site.
- 6) Click on the **Time** button at the bottom of the screen.

- 7) The *Time/Equip Usage* screen will appear. Click on the **New** button at the bottom of the screen.

Time/Equip Usage

Tsk#	Op	Start	Stop	Equip

- 8) The *New Time/Equip Usage* screen will appear. Click on the drop-down list to the right of *Task Title* and select the task to be timed.

New Time/Equip Usage

Task Title:

Operator:

Equipment:

Start Time: 3:41:17 pm.....

Start Meter:

Task Instruction:

Note: If there are no tasks setup, only the task *Default* will appear. Select *Default* as the *Task Title*.

- 9) Click on the drop-down list to the right of *Operator* and select the appropriate operator to be timed.

New Time/Equip Usage

Task Title: ▼ Blow-BPack

Operator:

Equipment:

Start Time: 3:41:17 pm.....

Start Meter:

Task Instruction: Don't blow leaves into the pool.....

- 10) Click on the drop-down list to the right of *Equipment* and select the appropriate piece of equipment to be timed.

New Time/Equip Usage

Task Title: ▼ Blow-BPack
 Operator: ▼ Joe
 Equipment: <none>
 Start Time: Echo-blow
 Start Meter: Exmark

Task Instruction:
 Don't blow leaves into the pool.

(Cancel) (Done)

Note: To track the mileage usage on equipment click on the line to the right of *Start Meter*. Use the keyboard screen to enter the starting odometer reading then click on **Done** to return to the previous screen.

- 11) Click on **Done** to return to the previous screen.
- 12) The job will automatically start timing. To begin timing a new job/task, follow through steps 1-11. Each time you begin timing a new job/task, the previous job/task is stopped.

Entering Material Usage

The QXDC enables the user to track materials used for each job and/or for each task. To enter material usage into the QXDC, follow the steps outlined below.

- 1) Go to the *Job List* screen.
- 2) Click on the specific job.
- 3) Click on the **Material** button at the bottom of the screen.
- 4) The *Material Usage* screen will appear. Click on the **New** button at the bottom of the screen.

Material Usage

Tsk#	Op	Name	UnitsUsed	Unit

(New) (Detail) (Done)

- 5) The *New Material Usage* screen will appear. Click on the drop-down list to the right of *Task Title* and select the appropriate task.

New Material Usage

Task Title:

Operator:

Material Name:

Units Used:

Unit: ▼

Task Instruction:
.....
.....
.....

Note: If there are no tasks setup, only the task *Default* will appear. Select *Default* as the *Task Title*.

- 6) Click on the drop-down list to the right of *Operator* and select the appropriate operator to be timed.

New Material Usage

Task Title: ▼ Install

Operator:

Material Name:

Units Used:

Unit: ▼

Task Instruction:
.....
.....
.....

- 7) Click on the drop-down list to the right of *Material Name* and select the appropriate material.

New Material Usage

Task Title: ▼ Install

Operator: ▼ Joe

Material Name:

Units Used:

Unit: ▼

Task Instruction:
.....
.....
.....

- 8) Click on the line to the right of *Units Used*.

- 9) The *Keyboard* screen will appear. Use the *Keyboard* screen to enter the appropriate number of units.



- 10) Click on **Done** to return to the previous screen.



- 11) The material has now been entered to as part of the job's cost.

Adding a New Task

In the event that a crew would like to add a task to a job while in the field, the crew can use the *Add a New Task* feature of the QXDC. To add a new task to a job, follow the instructions outlined below.

- 1) Go to the *Job List* screen.
- 2) Click on the specific job site.
- 3) Click on the **Detail** button at the bottom of the screen.

- 4) The *Job Info* screen will appear. Click on **New Tsk**.

Job Info History

Title: Landscape
 Site: 5647 Cypress Hill Rd, Bayshore
 Status: ▼ OnRoute
 Name: Kristy Abercrombie
 Phone: 415-555-6579

Tsk#	Title	Est. Time	Status
1	Inspection	0.17	Pending
2	Clean	0.50	Pending
3	Install	4.00	Pending

(New Tsk) (Tsk Info) (Note) (Done)

- 5) The *New Task* screen will appear. Click on the drop-down list to the right of *Task Title* and select the appropriate task title.

New Task

Task No: 4

Task Title:

Est. Time:

Task Status: ▼

(Cancel) (Done)

- 6) Click on the line to the right of *Est. Time*.
- 7) The *Keyboard* screen will appear. Use the *Keyboard* screen to enter the estimated time it will take to complete the new task.

New Task Keyboard

.....

\$ € £ ¥	1 2 3	- + ←
[] { }	4 5 6	/ * :
< > \ =	7 8 9	. , ←
@ ~ & #	(0)	space %
Done	abc 123 Int'l	

- 8) Click on **Done** to return to the previous screen.

- 9) Click on the drop-down list to the right of *Task Status* and select the appropriate status of the new task.

New Task

Task No: 4.....

Task Title: ▼ Blow-BPack

Est. Time: 1.....

Task Status: Pending
Done
Canceled

- 10) Click on **Done** to return to the previous screen.
- 11) The new task will now appear in the list of tasks.

Entering Job Notes

In the event that the crew would like to enter a note about a job for the office, the crew would enter a job note into the QXDC. Job notes may include additional jobs that were performed, complaints submitted by the client or price changes. To enter a new job note into the QXDC, follow the steps outlined below.

- 1) Go to the *Job List* screen.
- 2) Click on the specific job site.
- 3) Click on **Detail**.
- 4) The *Job Info* screen will appear. Click on **Note**.

Job Info History

Title: Landscape.....

Site: 5647 Cypress Hill Rd, Bayshore.....

Status: ▼ OnRoute

Name: Kristy Abercrombie.....

Phone: 415-555-6579.....

Tsk#	Title	Est. Time	Status
1	Inspection	0.17	Pending
2	Clean	0.50	Pending
3	Install	4.00	Pending

New Tsk Tsk Info Note Done

- 5) The *Job Note* screen will appear. Click on any of the lines beneath *Job Note*.

Instruction:

 Job Note:

Done

- 6) Click on the “abc” button on your PDA to go to the *Keyboard* screen.



- 7) Use the *Keyboard* screen to enter the job note.
- 8) Click on **Done** to return to the previous screen.
- 9) Click on **Done** to return to the previous screen.
- 10) The job note has now been entered for the job.

Entering a New Job in the Field

There may be times that the crew will have to enter new jobs into the QXDC. Whether it is a new job for an existing client, or a job for a new client, the QXDC will track the information. To enter a new job to the route list, follow the steps outlined below.

- 1) Go to the *Job List* screen.
- 2) Click on **New**.

- 3) The *New Job* screen will appear. Click on the drop-down list to the right of *Site* and select the appropriate job site.

Note: If the job site is not in the list provided, scroll to the end of the list and select other. At the end of the day, when the information is uploaded, QXpress will prompt the user to associate a job site with this new job. At that time, a new job site can be added.

- 4) Click on the drop-down list to the right of *Status* and select the appropriate status of the new job.

- 5) Click on **Done** to return to the previous screen.
- 6) The new job will appear at the bottom of the *Job List* screen.

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Section Five

Uploading Information to the Desktop

This section explains how to transfer information from the QXDC to a Desktop and, once there, how to complete a day's work.

The topics in this section are divided into the following:

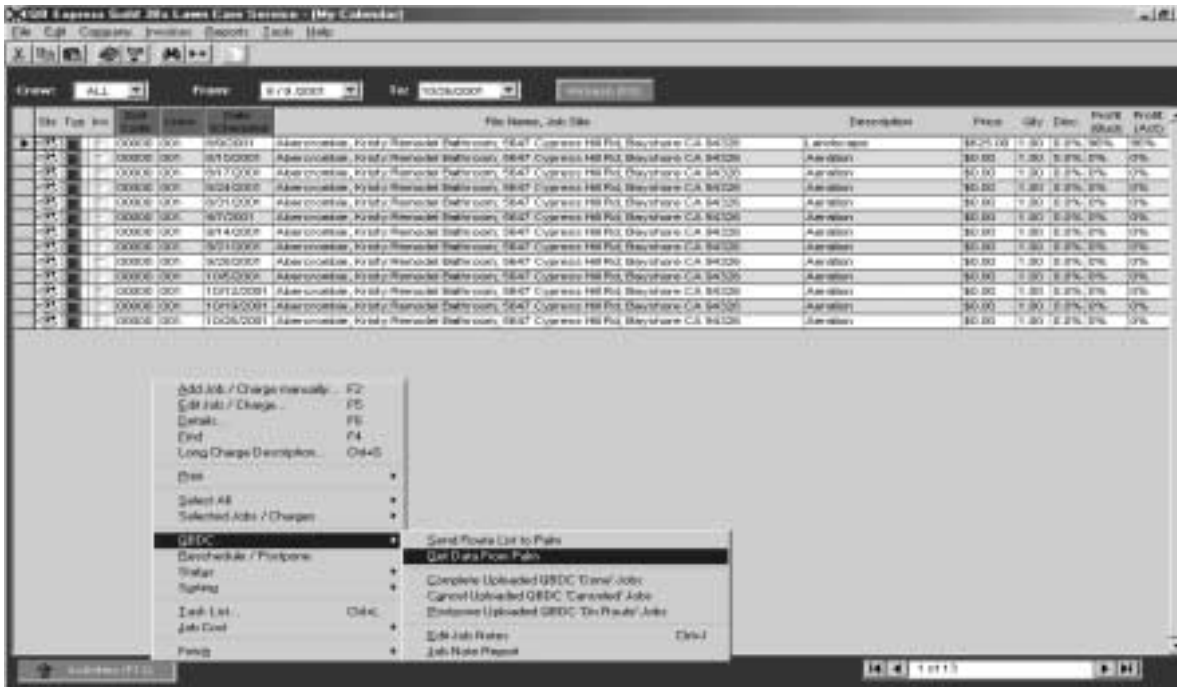
- Uploading from PDA to Desktop
- Editing Uploaded Information
- Viewing Job Notes
- Completing Jobs

Uploading from PDA to Desktop

At the end of each day, the information collected with QXDC will have to be entered into the main office computer. To upload all information from the QXDC to the Desktop, follow the steps outlined below.

- 1) Place your PDA into its cradle.
- 2) In QXpress, go to *My Calendar*.

3) Click on **Activities > QXDC > Get Data from Palm.**

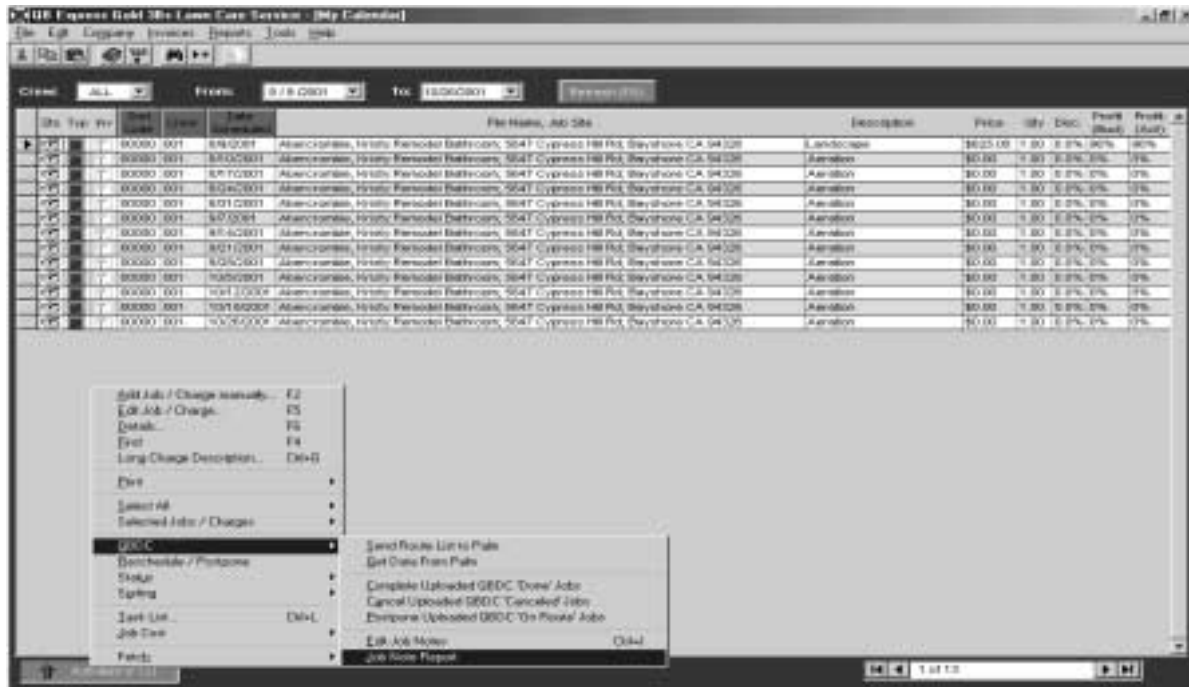


- 4) When prompted to do so, press the *HotSync* button on your PDA's cradle.
- 5) A message will appear on both your monitor and on your PDA when the *HotSync* is completed.

Editing Uploaded Information

In some cases, the information uploaded from QXDC to the Desktop may require editing. For instance, crews may have forgot to stop/start timing a job. All time, equipment, material and overhead entries can be edited before the jobs are completed. To edit job cost information, follow the steps outlined below.

1) In *My Calendar*, click on **Activities > QXDC > Job Note Report**.



Completing Jobs

After the information has been uploaded from QXDC to Desktop, job cost information has been edited and job notes have been viewed, the jobs can be completed. To automatically complete jobs that already have the status of *Complete* in the QXDC, follow the steps outlined below.

- 1) In *My Calendar*, click on **Activities > QXDC > Complete Uploaded QXDC Done Jobs**. All of the jobs that had a status of done on the QXDC will now be completed in QXpress.

