QXPRESS VERSION 10.0 FEATURE LIST

This document lists the main new features included in the QXpress version 10.0 release. For each feature listed, where applicable, there is also a description of the feature and step-by-step instructions explaining how to use the feature.

QUICKBOOKS INTEGRATION

1. QuickBooks 2011 compatibility

Versions: All

QXpress 10.0 has been configured to be compatible with the upcoming release of QuickBooks 2011 US, Canadian 2011, South African 2010 and UK 2010, and Australian 2009/2010.

2. Inactive customers - ability to view and alter from QXpress

Versions: All

You can now view inactive QuickBooks customers in QXpress, as well as set the active/inactive status of a QuickBooks customer. In previous versions of QXpress only active customers were visible in QXpress and altering the status had to be done in QuickBooks directly.

To view inactive customers:

1) Go to **Lists > Customer List**.

2) Place a check in the *Show Inactive* checkbox.

3) Look for customers that have an “X” icon in the first column.

4) Double-click on the inactive customer to be taken to their account.

To set active/inactive on a customer:

1) View an active customer / inactive customer in the *Customers* screen.

2) Click **Edit Customer...**.

3) Check or uncheck the *Is Active?* checkbox.

4) Click **OK**.

Note: The preference for showing active/inactive customers will be saved and retrieved for each user of QXpress.

3. Marking QuickBooks transactions as 'posted' even though they are not.

Versions: All

Under the Post to QuickBooks menu a list is displayed for all invoices, service times, inventory adjustments and vendor bills that have not yet been sent to QuickBooks. Since some users only start exporting these transactions to QuickBooks at a later stage in their QXpress use, there is often a large list of old transactions you may want to remove first, before you start exporting transactions from this point forward. In previous versions of QXpress, the only way to remove these from the list was to make a backup of QuickBooks, post the transactions over, and then restore the backup. Those days are gone! You can now mark transactions as posted easily from QXpress.

To mark invoices as posted:

1) Go to **Post to QuickBooks > Invoices**.

2) Select all the invoices you want to mark as posted - or use SELECT ALL to select all invoices.

3) Right-click and choose *Mark as Exported*.

4) Agree to the prompts. You'll see the invoices now under the *Already sent to QB* tab, with an export date of Jan-01-1980.

To mark service times as posted:

1) Go to **Post to QuickBooks > Service Times**.

2) Select all the services times you want to mark as posted - or use SELECT ALL to select all service times.

3) Right-click and choose *Mark as Exported*.

4) Agree to the prompts. You'll see the service times now under the *Already sent to QB* tab, with an export date of Jan-01-1980.

To mark vendor bills as posted:

1) Go to **Post to QuickBooks > Vendor Bills**.

2) Select all the vendor bills you want to mark as posted - or use SELECT ALL to select all vendor bills.

3) Right-click and choose *Mark as Exported*.

4) Agree to the prompts. You'll see the vendor bills now under the *Already sent to QB* tab, with an export date of Jan-01-1980.

To mark inventory adjustments as posted:

1) Go to **Post to QuickBooks > Inventory Adjustments**.

2) Select all the inventory adjustments you want to mark as posted - or use SELECT ALL to select all inventory adjustments.

3) Right-click and choose *Mark as Exported*.

4) Agree to the prompts. The adjustments will disappear from the list.

4. Sales Rep added to Add/Edit Customer screen

Versions: All

QXpress now has the QuickBooks 'Rep' field added to the Add/Edit Customer screen allowing you to view, add and edit the assigned rep to a QuickBooks customer.

SCHEDULING

5. Read-only permissions on the calendar / service screen

Versions: Platinum and Enterprise

You can now give permission to staff to view but not edit, add, move, reschedule or otherwise make any change to a service in QXpress. This is useful for field staff that need permission to see their work and print it off, but not make modifications.

To use this feature:

1) Go to **Tools > Options**.

2) Go to the *Login Permissions* tab.

3) Edit a user that you want to give read-only permissions to.

4) Advance to step 33 of the wizard and set 'no access".

5) Click **Finish**.

6) Login as that user now and you'll see that they have no ability to modify a service from the *service* screen or from the calendar.

Note: It is important to also play close attention to other areas of QXpress that need permissions set for this user, as permissions on other screens may still allow them to modify services.

6. Auto-Refresh of calendar

Versions: All

If the calendar is idle for a specified period, meaning there have been no modifications to it, a background timer will automatically refresh the calendar. This allows your staff to have the calendar refresh automatically with the latest work orders without any interaction or interruption - this is very useful in a network environment where many users are adding and moving services on the same QXpress file. The calendar now also shows the last time it was refreshed next to the *Refresh* button.

To use this feature:

1) Go to **Tools > Options**.

2) Go to the *Routing & Scheduling* tab.

3) Set the *Auto calendar refresh* dropdown list to either *5 minutes*, *10 minutes*, *15 minutes*, *30 minutes*, *60 minutes* or *never*. By default this is 5 minutes. If you want to turn this feature off entirely, set the value to *never*.

To skip a pending refresh:

1) If the autorefresh is approaching approximately 1 minute the *last refreshed* label next to the *Refresh* button will turn red and start counting down the seconds to refresh.

2) If you want to skip this refresh, simply click the red label and the next autorefresh will occur later.

To view the next scheduled auto-refresh:

1) Hover your mouse over the *last refreshed* label and you'll see the next scheduled refresh time.

7. Ability to select and delete a group of services from the *Customer* screen.

Versions: All

Previously, to delete a service you needed to first edit the service, and click Activities > Delete. This was made deliberately hard so that it would be difficult to delete services by mistake. However, when deleting many services, the process can be cumbersome. In QXpress you can now delete a group of services directly from the *Customer* screen.

To use this feature:

1) Go to the *Customer* screen.

2) Select a customer.

3) Select the *Schedule* tab.

4) Highlight the services you wish to delete.

5) Click **Schedule > Selected Services / Billing Installments > Delete**.

6) Agree to the prompts.

8. Ability to set the renewal date for a group of services from the *Customer* screen.

Versions: All

To use this feature:

1) Go to the *Customer* screen.

2) Select a customer.

3) Select the *Services* tab.

4) Highlight the services you wish to set the renewal date of.

5) Click **Schedule > Selected Services / Billing Installments > Change renewal date**.

6) Enter the new renewal date, and click **OK**.

9. Printing work orders from the *Recurring Dates* tab

Versions: All

You can now print work orders from the *Recurring Dates* tab of the service screen.

To use this feature:

1) Open the *Service* screen to series of the desired recurring service.

2) Go to the *Recurring Dates* tab.

3) Click on the service date of the work order you want to print. Ensure that this service date has an *On Route* status.

4) Click **Activities > Print Work Order**.

10. Renewal Center: Ability to remove any line item, not just discounts

Versions: All

Previously the renewal center was limited to only resetting discount lines of renewable services. Due to the requests of QXpress users, we have changed Step 3 of the renewal center from “Reset discounts” to “Reset Job Items and Discounts”, allowing you to remove any type of job item.

To use this feature:

1) Go to **Tools > Renewal Center**.
2) Go to step 3.
3) Change the radio button from “Show only discount job items” to “Show all job items”.
4) Remove whichever job items you desire.

11. Renewal Center: Filter options on all grids

Versions: All

You will now see filter options on the top of all grids in the renewal center, making it a lot easier to renew for certain customers or certain service descriptions.

To use this feature:

1) Go to **Tools > Renewal Center**.
2) Select any of the four tabs.
3) Enter a partial match for your desired customer or service into the filter textboxes at the top of the tab.
4) Click **Filter**.

MARKETING

12. Leads

Versions: Platinum and Enterprise

For the first time, it is now possible to have customers in QXpress that are not automatically posted to QuickBooks. These customers are called “Leads” and only get converted to customers when you are ready. This means you can have hundreds or thousands of potential customers in QXpress for marketing purposes, and not clutter up your QuickBooks file!

To add a new lead:

1) Go to **Lists > Customer List**.

2) Go to the *List* tab.

3) Click **New**.

4) In the *Add QuickBooks Customer* screen, place a check in the *Lead - don’t create in QuickBooks yet* checkbox, and notice that the screen caption will become *Add Lead*.

5) Choose a *Lead Source* (optional). If you want to create or modify a new Lead Source, click the “...” button next to Lead Source.

6) Choose a *Lead Status* (optional).

   Closed Lead Statuses (meaning you are finished trying to get them as a customer) are:

   “Won”, “Lost”, “Void”, “Sold Alternative”

   Open Lead Statuses (meaning you are still trying to get them as a customer) are:
   “Open”, “New”, “Hold”

7) Enter a *Lead Closed Date*. Note, this date is automatically entered for you if you choose a “closed” Lead Status.

8) Fill out the customer information as you would for a regular QuickBooks customer.

9) Click **OK**.

To view a lead in the customer list:

1) Go to **Lists > Customer List**.

2) Go to the *List* tab.

3) Make sure the *Show Leads* checkbox has a check in it.

4) Locate the lead in the list and double-click on their name. Notice that the lead will have "Lead" in the *Status* column.

To convert a lead to a customer:

1) View the lead in the *Customers* screen.

2) Click **Edit / Convert Lead...**.

3) Uncheck the *Lead - don't create in QuickBooks yet?* checkbox.

4) Click **OK**.

To filter the customer screen by lead status/source/source class:

1) In the *Customers* screen click the *Find* tab.

2) Go to the *Lead Information* tab.

3) Select a filter value for *Lead Source*, *Lead Source Class*, *Lead Status*.

4) Click **Filter**.

To view / create reports for leads:

1) Go to **Reports > Template Designer Reports**.

2) Click **Download Template...**.

3) For *Shared Name* filter by 'Leads_Status'.

4) Look for the reports 'Leads_StatusByRepDetail', 'Leads_StatusByRepSummary', 'Leads_StatusBySourceDetail', 'Leads_StatusBySourceSummary', or any other reports that are created by QXpress Software.

5) Select the desired report and click **Download Selected Template**.

Note: You'll notice that the AID of a lead customer is a very high number until converted. All leads are assigned an AID number from 1,000,000 and higher. Once they get converted they will receive a proper AID from QuickBooks.

OTHER

13. Emailing PDF and dispatch emails using Outlook

Versions: All

You can now choose to email PDFs and dispatch to email/pager using Outlook instead of the QXpress mail server. This allows you to see a history of what has been sent, as well as more control over your own environment.

To set this preference:

1) Go to **File > Emails forms**. Click **OK** to any messages that come up with the caption "No emails need sending".

2) Click **Server Settings**.

3) Change the *Email Server Settings* to *Use Outlook*.

4) Click **OK**.

Note: You must be using the Report Designer 2.0.0.206 or higher to use this feature for PDFs.

14. New customer billing address entry more closely follows QuickBooks

Versions: All

When adding new customers, if the 2nd line of the billing address is empty and the 1st line is the company name, then exiting the last name field will put the name on the 2nd line. This matches better how QuickBooks does it. Previously if the 1st line of the billing address was occupied it would not enter the customer's name in the billing address.

In addition, using the up and down keyboard arrows in the bill to address and ship to address now allow you to move up and down the text box, emulating QuickBooks.

15. New permission - Edit custom field settings

Versions: Platinum and Enterprise.

On step 34 of the permissions wizard you now have the option of limiting who can add, edit and remove custom fields from the *Customer* screen and from the *Service* screen.

16. Mail server settings no longer needed

Versions: All

If you are emailing PDFs and/or using the dispatch to email/pager feature, you no longer have to put your company mail server credentials into QXpress in order to use the QXpress mail server.

17. Enterprise Backup

Versions: Enterprise

QX Enterprise users who have a registered copy of SQL Server Standard, WorkGroup or Enterprise can now schedule automatic database backups. This can be done by going to **File > Setup automatic SQL Server Backup**.

Note: SQL Server Agent must be running on the server, and requires SQL Server Standard, Workgroup or Enterprise (rather than the SQL Server Express version supplied by default with QXpress Enterprise). If you only have the basic SQL Server Express edition that was supplied with QXpress Enterprise you will not be able to use this feature until you upgrade your SQL Server edition - which may come at a considerable expense.

18. Backup reminders

Versions: All

You can now configure startup alerts to remind you to backup your database. To set this reminder go to **Tools > Options**, and set the *Backup Database Reminder* option under the *General* tab. By default this will be every 5 days.

19. Launch QXpress Documents folder

Versions: All

Since QXpress 9.5 came out, new databases and documents are no longer stored in Program Files\QXpress. Instead they are stored in the Windows documents\Application Data\QXpress folder. This folder is often hard to find, and differs in location from XP to Vista and Windows 7. To make it easier to find the QXpress documents folder, in QXpress 10.0 you can now click **File > Launch QXpress Documents folder** from the *Login* screen, as well as **Help > Launch QXpress Documents folder** from inside QXpress. This will open up the folder in *Windows Explorer*.