QXPRESS VERSION 8.0 FEATURE LIST

This document lists the main new features included in the QXpress version 8.0 release. For each 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 2008 compatibility

Versions: All

QXpress 8.0 has been configured to be compatible with the upcoming release of QuickBooks 2008 US, and Australian 2007/2008. While QX8 is not currently compatible with Canadian and UK 2008, it will be by the time QX8 is released.

2. Changes-only sync

Versions: All

A new feature has been added to the QX Sync screen that allows you to only request the latest changes from QuickBooks, rather than a refresh of the entire QuickBooks database. This provides a significant benefit for larger companies since the processing time for a sync is very short, and does not require all users to log out of QXpress.

Note: Although this is a QX8 feature, it was made available at the tail end of the QX7 product cycle

3. Performance increase on adding or modifying customers

Versions: All

Users that have large customer lists will see a significant performance increase when adding or modifying customers in either QXpress or QuickBooks.

Note: Although this is a QX8 feature, it was made available at the tail end of the QX7 product cycle.

4. Capitalization of states and postal codes

Versions: All

There is now an option to automatically capitalize state / province abbreviations as well as postal codes when adding or editing a QuickBooks customer.

To turn on this feature:

1) Click **Edit > Preferences**.

2) Under the General tab, check the "Automatically capitalize State and Zip Code?" checkbox.

Note: The capitalization will occur when you click or tab out of the field, not while you are typing.

5. Override on edit sequence

Versions: All

In previous versions if you add or edit a QuickBooks customer and someone else has added or edited the customer since you started, you would be refused the ability to save changes. This has been improved so that you will now get a prompt to see if you want to override the warning and send your changes anyway.

EQUIPMENT

6. Warranty information on equipment

Versions: Gold, Platinum and Enterprise

There are now three additional fields available in the Equipment screen: "Expiry on labor", "Expiry on parts" and "Notes".

To enter information into these fields:

1) Click **Lists > Equipment**.

2) Double-click on an existing equipment, or click **New** to create a new one.

3) Enter warranty information into the *Warranty* frame.

7. Equipment on Job Items

Versions: Gold, Platinum and Enterprise

You can now specify equipment for servicing when scheduling a new service. This is especially useful for companies that maintain equipment on customer job sites, such as heaters, boilers and air conditioning units. By using the Job Items tab a user can list several different units of equipment to be serviced on a one time or recurring basis.

To turn on the feature:

1) Go to **Edit > Preferences**.

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

3) Place a check in the "Show Equipment column in the Job Items tab?" checkbox.

To use this feature:

1) Open up any service.

2) Click on the *Job Items* tab.

3) Choose equipment from the *Equipment* column.

Note: You may have to stretch the *Service* screen to be wider to see all columns. The screen size will be remembered for next time.

Note: The template datasources for route lists and work orders haven't been updated yet to show equipment information. This will occur on the release of QX8.

CONTACT MANAGER

8. Printing Contact Events

Versions: Gold, Platinum and Enterprise

Events can now be printed directly from the *Add/Edit Contact Manager Event* screen. Previously events could only be printed from the *Contact Events* list.

9. Templates for Contact Events.

Versions: Platinum and Enterprise

Contact Event reports can now be printed using either standard reports, or a Template Designer report, if a Platinum or Enterprise user.

Note: The latest "Contact_Manager_Events" template will need to be downloaded so that the latest ContactManagerEvents4 datasource can be used to create templates.

10. Alerts

Versions: Gold, Platinum and Enterprise

An "Alert" field has been added to contact events so that a screen appears when a new service is being scheduled for that customer. This is especially useful if you want to flag the customer as someone you no longer want to provide service to (such as a slow payer or a ‘difficult’ customer), or for more positive reasons such as reminding for upsells, or when customers have specific needs, you can make an event that will prompt you to ask about those needs.

To set and test an alert for a customer:

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

2) Choose an existing event and click **Edit Event**, or click **New Event**.

3) Fill out the fields as necessary, making sure *Customer*, *Type* and *Status* are entered.

4) Place a check in the "Alert: This event is raised when a new service is scheduled for this customer?" checkbox.

5) Schedule a new service in *My Calendar*, making sure that the same customer is chosen. When you click **OK** you'll get an alert showing all the contact events for that customer that have an alert specified.

11. Related services can now be opened from within a contact manager event

Versions: Gold, Platinum and Enterprise

If you assign a related service to a contact event, it can now be opened directly from the *Add / Edit Contact Event* screen by clicking on the [...] button.

SCHEDULING

12. Conflict checking

Versions: All

There is now the ability to check each scheduled service to see if it conflicts with any future appointments.

To turn this on:

1) Go to **Edit > Preferences**.

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

3) Put a check in the "Show Scheduling Conflicts button in the Service screen?" checkbox.

4) Click **OK**.

To use this feature:

1) Schedule a new service, or open an existing one.

2) Ensure that your service has a *Start Time* and *Until Time* filled out.

3) From the *Service* screen, click on the "Check For Conflicts" button, which can be found between the Quick Invoice button and the OK button.

Note: Appointments will not be considered conflicts if they are for the same customer.

13. Appointment Colors

Versions: All

The ability to color-code appointment in Day View and Week View, has been added.

To use this feature:

1) Schedule a new service, or open an existing one.

2) Click on the *General* tab.

3) In the top right, change the "Appt. Color" dropdown list to the desired color.

4) Click **OK**.

5) Find the service in *My Calendar* under either the *Day View* or *Week View*.

Note: There is no way to change the label of the color. It is currently just the color's name.

Note: Appointment colors are not available for List View or Month View.

Note: There is no way to automatically set a default appointment color per crew.

Note: "Selected" appointments will always be assigned a blue color, regardless of what the appointment color is.

To set default appointment colors per Charge Description:

1) Click **Lists > Charge Description List**.

2) Click on an existing Charge Description.

3) Click **Advanced**.

4) Click on the *Advanced* tab.

5) Make a selection from the "Default appt. color:" dropdown list.

6) Click **OK**.

Note: This will not affect existing appointments.

14. Project Visit service times

Versions: Platinum and Enterprise

For project, when a project visit is turned On Route, a blank service time with the project visit's date is automatically inserted. This saves clutter on large projects by only inserting blank records as they are turned On Route.

15. My Week

Versions: All

You can now define when your "week" begins and ends, rather than just have the default of Monday to Friday.

To edit this setting:

1) Click **Edit > Preferences**.

2) Click on the *Day View* tab.

3) Make the desired selection from the "My week:" dropdown list.

4) Make sure you have the "Week" view selected in *My Calendar.*

5) Click **Refresh**.

16. Charge Description field length

Versions: All

The number of characters permitted for a Charge Description has increased from 50 characters to 250.

17. A significant performance increase on the "Estimated Hours" field

Versions: All

This dramatically increases the performance of *My Calendar* and the *Waiting List*. As well, route list, work order and "All Scheduled Jobs" reports, when updated to the latest datasources, will have a significant performance increase.

18. Dollar amounts in Month View

Versions: All

The ability now exists to hide sales and job cost revenue from the *Month View* calendar.

To set this feature:

1) Go to **Edit > Preferences**.
2) Click on the *Day View* tab.
3) Make the appropriate selection in the "Show dollar amounts in Month View?" checkbox.

19. Estimated hours column in List View

Versions: Gold, Platinum and Enterprise

The estimated hours column can now be made visible in the List View.

To set this feature:

1) Go to **Edit > Preferences**.
2) Click on the *List View* tab.

3) Make the appropriate selection under the *Est. Hours* column.

20. Show totals in List View

Versions: All

The ability has been added to show totals of "Est. Hours" and "Amount" in the footer of the *List View* grid.

To set this feature:

1) Go to **Edit > Preferences**.

2) Click on the *List View* tab.

3) Make the appropriate selection for the "Show totals in footer?" checkbox.

21. Waiting List sorting and position

Versions: All

In previous versions the *Waiting List* would lose its position and sorting when a job was either edited from the *Waiting List* or from the Calendar. In QX8 it will remember this position.

22. Updating instructions from series to occurrence

Versions: All

A common new user question has always been why editing the instructions on the occurrence of a recurring service does not affect the instructions of the entire series. This happens because as soon as a service is turned On Route it is considered to be separate from all future dates so that you can have specific pricing or instructions for that one visit. To make this easier, however, you will now be prompted to see if you want to update the series when you make changes to the occurrence, and vise versa.

To turn this feature on or off:

1) Go to **Edit > Preferences**.

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

3) Make the appropriate selection for the "Prompt to update instructions on recurring series when updated in occurrence?" checkbox.

23. Calendars for rescheduling

Versions: All

When you click **Activities > Reschedule** in *My Calendar* you will now be greeted with a calendar to choose the new reschedule date, rather than having to type in the new date manually.

OTHER

24. Create blank database

Versions: All

A new option has been added so that a new database can be created from the login form. Unlike the File > New Company Database option, this database is completely blank and does not include custom fields or templates from other databases.

To use this feature:

1) Go to the *Login Form*, by clicking **File > Logoff / Login**.

2) Click **File > Create blank database** (non-QX Enterprise).

25. Date change prompt

Versions: All

QXpress has been changed so that it won't stop to prompt to confirm that you want to change to the current date when the clock passes over midnight. It will just assume the clock should change.

26. SQL 2005 compatibility

Versions: Enterprise

QXpress Enterprise is now compatible with SQL 2005. Previously only SQL 2000 was used.

Note: Although this is a QX8 feature, it was made available at the tail end of the QX7 product cycle.

27. Post To QuickBooks reminders in Home screen

Versions: All

You now have the ability to show or hide the reminders to post invoices, service times, vendor bills and inventory adjustments to QuickBooks.

To set this feature:

1) Click **Edit > Preferences**.

2) Click on the *Display* tab.

3) Set the desired selection for each of the "Warn about unposted..." checkboxes.