QX Forms – Getting started guide

Welcome to QX Forms!

QX Forms are designed to provide you with professional, industry specific forms that require minimal changes on your part. For each industry we have researched what information needs to be included on each form and designed the forms accordingly. Using QX Forms will save you the time of creating your own company forms, as well as money on printing and design costs.

Download templates

There are 3 different types of download templates that are available for QX Forms. Each template serves a different purpose as explained below.

Standard QX Template

This template would be used if you wanted to print your forms directly through QXpress onto blank piece of paper. All boxes, text/data fields and graphics would be printed by your printer. Using this type of template means you don't have to order preprinted forms, however you will have the added cost of using more printer ink.

Preprinted QX Template

This template would be used if you wanted to print your forms onto preprinted paper. Only text and data fields would be printed onto the form. Using this template means that you need to use a blank form either printed by your local printing company or using a QX Form (refer to section – How to order preprinted QX Forms?)

Blank QX Template

This template would be used if you wanted to print your QX Forms at a local printing company. Only boxes and graphics would be displayed when printing this template. The printing company would take the blank template and create a preprinted form to use with QXpress. You would then use the *Preprinted QX Template* to display your data and text fields.

How to get QX Forms?

The first time you open QXpress (requires version 6.0 or higher) and complete the Start-Up interview, you are asked to select which industries apply to your business. Based on this selection, QXpress will automatically download the QX Forms that apply to those industries.

If you are using an existing QXpress database and would like to download the QX Forms, follow the steps below.

To download QX Forms for Route Lists/Work Orders:

1. Click **File > Print > Print Work Orders/Route Lists**.
2. Click **Customize**.
3. Click **Download Template**.
4. The list of available templates will now appear. To filter on only QX Forms, in the *Created By* field type in **QX Forms** and click **Filter**.

5. Select the template you wish to download and click **Download Selected Template**.

To download QX Forms for Invoices:

1. Click **Invoices > Invoice List**.
2. Click **Customize**.
3. Click **Download Template**.
4. The list of available templates will now appear. To filter on only QX Forms, in the *Created By* field type in **QX Forms** and click **Filter**.
5. Select the template you wish to download and click **Download Selected Template**.

To download QX Forms for Reports:

1. Click **Reports > Template Designer Reports**.
2. Click **Download Template**.
3. The list of available templates will now appear. To filter on only QX Forms, in the *Created By* field type in **QX Forms** and click **Filter**.
4. Select the template you wish to download and click **Download Selected Template**.

Customizing QX Forms for your company

Before you begin to use QX Forms, you will need to customize the forms for your company. Below is a check list of key areas to look out for while making changes to your customized forms.

Make a copy of the original form
Before making any changes you will need to make a copy of the original QX Form. To do this:

1. Select the QX Form from your list.
2. Click **New**.
3. Type in a name for your template.
4. Ensure that the option for *Copy and duplicate an existing template* is selected.
5. Click **OK**.

Company Logo

Each template has an area dedicated to placing your company logo or contact information. These areas are indicated on each template by the “Acme” company logo. If you wish to change the “Acme” logo to your company logo:

1. Open your custom template.
2. Double click on the “Acme” logo.
3. Under the *Display* tab, click the “Acme” logo.
4. Locate your company logo.
5. Click **Open**.
6. Click **OK**.

If you do not have a company logo, you can delete the “Acme” logo and replace it with your company’s contact information, by inserting either text boxes or Rich text boxes.

Contact Information

Depending on the QX Form you choose to use, there may be areas that indicate "Type your company name here". For these text boxes you will need to enter your company's contact information.

1. Open your custom template.
2. Double click on the text box you wish to modify.
3. In the *Caption* box, enter your companies contact information.
4. Click **OK**.
5. Follow steps 1 – 4 for any other fields you would like to replace with your company's contact information.

Column titles and custom fields

The column titles and custom fields have been strategically placed to work with the QX Forms. However you can change the column titles and custom fields by following the steps below.

1. Open your custom template.
2. Double click on the text box for the column title or custom field you wish to change.
3. In the *Caption* box, enter the new text.
4. Click **OK**.
5. Follow steps 1 – 4 for any other fields you would like to replace with your custom information.

Terms and conditions

Many of the QX Forms that deal with estimates, proposals and renewals have terms and conditions that have been entered as an example. To change these terms and conditions:

1. Open your custom template.
2. Double click on the text box with the terms/conditions you would like to change.
3. Make the appropriate changes to the text.
4. Click **OK**.

NOTE: Alocet Incorporated makes no warranties about the accuracy, legality, and appropriateness of any of the wording used in the template. If you have any concerns, you are advised to have a lawyer read through the document first, before it is used in your business.

Special instructions for selected forms

Most of the QX Forms are self-explanatory and do not require instructions on how to use them. However there are certain templates that require some background information before using them on a daily basis.

Fill in the blanks

In some cases crews carry blank forms with them to a job site and record pricing information when the work is completed. The "fill in the blanks" forms are designed to be printed through QXpress but leave blank areas to be completed by the crew, on the job site. These forms are listed below:

- Irrigation Industry Work Order
- Pest Control Industry Work Order

- Plumbing Industry Work Order
- Pool Maintenance Work Order

Irrigation Industry Renewal Letter

The Irrigation Renewal Letter is designed to list services that were previously scheduled and are up for renewal. There are 2 key areas that you need to pay special attention to when using this form. These areas are:

- Prepay discount
- Additional services

Prepay Discount

By default, the renewal letter is setup to provide customers with a 5% discount off of last year's services, if they prepay by the indicated date. If you would like to change the prepay percentage, follow the steps below.

1. Open your custom template.
2. Select the *Sub-JobSetupList-Subreport2* tab at the top of the page.
3. Double click the *PrepayAmount* field.
4. Click the *Formula Field* tab.
5. Click **Edit Manually**.
6. Change the rate from **.95** to the desired prepay discount. For example, 10% would be **.90**.
7. Click **OK**.
8. Follow the same steps for subreports called:

   Sub-OptionalServiceList_v31
   Sub-OptionalServiceList_v32
9. For the subreport called *Sub-OptionalServiceList_v31*, the field name to enter the prepay discount is called *FR_FeeRate*.
10. For the subreport called *Sub-OptionalServiceList_v32*, the field name to enter the prepay discount is called *Formula3*.

Additional Services

In order to list additional services, you will need to use the Fee Schedule. If you are unsure of how to setup the Fee Schedule, refer to the QXpress Users Manual by clicking the link below:

http://www.alocet.com/downloads/QXpress_Manual.pdf

If you do not wish to use the Fee Schedule and would like to just display additional services available to the customer, simply delete the subreport.

Lawn and Tree Spraying Estimate/Work Order

The Lawn and Tree Spraying Estimate/Work Order is designed for companies that have their crews/employees visit potential customers' homes and provide a quote for lawn and tree care services. Here is a typical scenario that a lawn and tree spraying company would go through to implement the use of this form.

1. A customer calls up and requests to have an estimate for their yearly lawn and tree care service.

2. The customer is added into QXpress and is scheduled for a particular day. The person entering the service also enters any special notes or requests into the *Instructions for crew*.
3. On scheduled service date, the office prints off the QX Form called *Lawn and Tree Spraying Estimate/Work Order* and hands this to the crew/employee.
4. While at the customers address, the employee indicates which program they recommend and give a price for each program.
5. The estimate is left at the customers address and if the customer wishes to go ahead with the selected program, they mail in the order form at the bottom of the page.

To use this template for your Lawn and Tree Spraying Company, simply edit the template and fill in the appropriate services and programs you offer to your customer.

Lawn and Tree Spraying Renewal Letter

The Lawn and Tree Spraying Renewal Letter is designed to list services that were previously performed and are up for renewal. There are 2 key areas that you need to pay special attention to when using this form. These areas are:

- Prepay discount
- Recommended services

Prepay Discount

By default, the renewal letter is setup to provide customers with a 5% discount off of last year's services, if they prepay by the indicated date. If you would like to change the prepay percentage, follow the steps below.

1. Open your custom template.
2. Select the *Sub-JobSetupList-Subreport2* tab at the top of the page.
3. Double click the *PrePayRate* field.
4. Click the *Formula Field* tab.
5. Click **Edit Manually**.
6. Change the rate from **.95** to the desired prepay discount. For example, 10% would be **.90**.
7. Click **OK**.
8. Follow the same steps for subreports called:

   Sub-JobSetupList-Subreport1
   Sub-OptionalServiceList_v31
   Sub-OptionalServiceList_v32
9. For the subreport called *Sub-JobSetupList-Subreport1*, the field name to enter the prepay discount is called *Prepay*.
10. For the subreport called *Sub-OptionalServiceList_v31*, the field name to enter the prepay discount is called *Formula4*.
11. For the subreport called *Sub-OptionalServiceList_v32*, the field name to enter the prepay discount is called *Formula5*.

Recommended Services

In order to list recommended services, you will need to use the Fee Schedule. If you are unsure of how to setup the Fee Schedule, refer to the QXpress Users Manual by clicking the link below:

http://www.alocet.com/downloads/QXpress_Manual.pdf

Once you have setup the Fee Schedule for your recommended services, they will appear in the *Recommended Services* box and on the remit slip at the bottom of the page.

Termite Renewal Letter

The Termite Renewal Letter is designed for companies that perform yearly termite prevention services to their customers. The letter details the agreement between the client and the pest control company and specifies the price for next years service, as well as an expiry date. There are 2 key areas that you need to pay special attention to when using this form. These areas are:

- Charge description with the name "Termite Renewal Agreement"
- Yearly, recurring service setup.

Charge description with the name "Termite Renewal Agreement"

Create a charge description with the name "Termite Renewal Agreement". To do this:

1. Click **Lists > Charge Description List**.
2. Click **New**.
3. Under the *Item* column, click the dropdown arrow.
4. Click **--New Item--**.
5. For the *Type* dropdown list, click **Service**.
6. In the *Item Name/Number* field, type in **Termite Renewal Agreement**.
7. Click **OK**.

Yearly, recurring service setup

The Termite Renewal Letter will look to see if a service is setup with the name "Termite Renewal Agreement". Since this service is done on a yearly basis, you will need to setup a recurring service. To do this:

1. Click **Schedule > New**.
2. Under the *Type* dropdown list, click **Recurring Service**.
3. Under the *Charge Description* dropdown list, click **Termite Renewal Agreement**.
4. Under the *For Customer* dropdown list, select the customer you wish to add the service for.
5. Click **OK**.
6. Under the *General* tab, enter the *Rate/Price* for the service.
7. Click on the *Recurring Dates* tab.
8. For *Basis*, click **Yearly**.
9. Enter the conditions for you yearly service and click **Generate dates**.

The service will now appear on the Termite Renewal Agreement for the specified amount.

NOTE: If you would like to use a different name for your termite renewal service instead of the standard "Termite Renewal Agreement", follow the steps below.

1. Open your custom template.
2. Select the *Sub-JobSetupList-Subreport1* tab at the top of the page.
3. In the detail section, double click on the field called *FR_WorkOrder*.
4. Click the *Formula Field* tab.
5. Click **Edit manually (advanced)**.

6. Delete the text for *Termite Renewal Agreement* and replay it with your termite renewal service name.
7. Click **OK**.
8. Follow setups 3 – 7 for the field called *FR_Termite*. NOTE: This field may be located behind the field called *FR_WorkOrder*.
9. Click **OK**.

How to order preprinted QX Forms?

Ordering your QX Forms is simple. Visit the 3rd Party Solutions section on our website for ordering QX Forms from our preferred vendor, Relizon Inc. To visit the 3rd Party Solutions section now:

1. Go to www.qxpress.com
2. Click **3rd Party Solutions**.
3. Click **Solutions Providers**.