QXpress Online

Quick Start Guide 1.1

www.qxpressonline.com

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QXpress Online Overview

QXpress Online is a web based version of the field-service industry leading desktop product QXpress Scheduling Software. It gives QuickBooks users the ability to schedule one time or recurring services, print work orders and route lists, enter job cost information, and turn completed work orders into QuickBooks invoices. QXpress Online can be used and customized by anyone who schedules services to be performed by their staff or subcontractors. Examples of such industries include Lawn Care, Landscaping, Pest Control, Irrigation, HVAC, Plumbing, Electrical, Pool Maintenance and Cleaning.

What is "Method"? The story behind creating QXpress Online…

Before diving into QXpress Online, it is worth knowing the story behind how we got to where we are today, as it will help you learn why this is different from anything you've used before. *Really*, it is. It all started in spring 2006 when our team was brainstorming about what features to put into QXpress version 7. We began the all too familiar task of figuring out which features would help the most people without making QXpress too complex. It is a source for annual frustration for our team because if we had it our way we would put every feature in that every user wanted. But we know that if we did that, the software would become un-usable. So we had an idea – more like a day dream - **what if we treated an entire software program like a report template, where users could design their *own* screens, design their *own* processes, and actually put their *own* features in?** Surely if we could do that, then everyone would benefit because they would no longer have to wait for new features – they could just develop their own features. Unfortunately, we thought, if that was actually possible…then some other software company would have already done it…and since this hadn't been done we came to the conclusion that it must not be possible.

Over the following days we started to challenge this conclusion – and eventually determined that it didn't matter that this had never been done before. If we could pull it off, we could change the future of the small business software world forever. And so we began – and there hasn't been a day since where we have even so much as paused on our quest of bringing this to a reality.

The only way to accomplish this goal was to assemble a team and create an entire application development platform which we could then use to make apps for *any* industry – including QXpress Online for field service companies. So, we started a new division of our company called "Method Integration" to build the platform to make everything possible. The Method platform developed its own patent-pending, bi-direction synching engine that synchronizes *every* QuickBooks list and transaction in real-time between a desktop app and a web server. This enables Method to sport a live web-based version of your desktop QuickBooks, along with a Sales Center and Call Center for CRM capabilities. You can then install other "apps" (like QXpress Online) to add industry-specific functionality. Finally, everything you see is built using the same tools you have access to, enabling you to create your own fields, tables, screens, actions, customer portals, and more.

Your days of limited one-size-fits-all, *industry-specific*, boxed software are over. With the help of the Method platform, QXpress Online brings in a new era of *company-specific* freedom.

How do I get QXpress Online?

If you are not already a user on the Method Integration Platform, visit the following website and go through the signup process:
https://www.methodintegration.com/web/SignUpApp.aspx?app=QXpress%20Online

If you are already a Method user, simply sign into Method, click on the **Customize** tab, click on the **My Account** tab link, and add the QXpress Online app to your account.

How do I add more advanced functionality, specific to my company?

QXpress Online is designed to allow you to schedule one-time and recurring jobs, print route lists and work orders, enter job costing information, and post the jobs as invoices back to QuickBooks. This is not, however, like a typical boxed software product that throws hundreds of features in your face in the hopes that you find the few features that you might actually be able to use, and wait for the next annual upgrade in the hope it has the other features that you still need. Instead, QXpress Online sets out to solve the core 90% of your needs and leaves it up to you to customize the last 10% to your specific requirements.

Important Recommendations

Use FireFox, *not* Internet Explorer. Microsoft Internet Explorer (version 7 and earlier) is just much slower than other browsers. We recommend you run QXpress Online on **FireFox**, which you can download for free from http://www.GetFireFox.com. The speed difference is remarkable – you'll be surprised.

Community. QXpress Online is heavily community based, so make use of it. You'll find that there are some power users out there who have already customized screens similar to how you want them customized, and would be more than happy to share their work with you in exchange for you buying them a drink at this year's QXpress Users Conference! Visit the QXpress Online community at http://qxpress.com/cs/.

Customization Services. The fact that each QXpress Online user can have their own fully customized version makes it a unique solution. However, it is important to recognize that some customization tasks could be outside of your technical comfort zone. For example, adding a new field to a screen may be one thing, but designing a new process from scratch might require outside help. Therefore, be aware that for a fee, **our staff offers customization services**.

What's coming on the horizon?

Mapping. We expect to have mapping capabilities in by the end of winter 2009 so that you can optimize routes, get driving directions, and dispatch based on proximity.

Mobile Devices. Since QXpress Online is web-based, most internet-enabled phones can already use Method. By the end of winter 2009, however, we expect to have QXpress Online auto-detecting that you are using a mobile device and to trim down the interface so that it is compact and much more easily used by field staff.

Outlook Integration. Since CRM is built into Method, and therefore QXpress Online, syncing with Outlook emails and calendars is a highly sought after addition. There is an early beta version of the Outlook Add-in that syncs emails that you can install

from:
http://www.methodintegration.com/documentation/MethodCRMAddinSetup.zip

Transfer Program. A transfer program is already in development by a third party. For a reasonable price, they will be able to take the majority of your existing QXpress data and do a one-time export to QXpress Online. This is expected to be available late winter. You'll see more about this on the QXpress Online forums.

QXpress Online "spin-off" apps. QXpress Online users have already started customizing their own versions so that they are more specific to certain industries. These users will soon start selling these as apps via the Method App Library:
http://www.methodintegration.com/web/application-library.aspx

"A to B" tutorial

Before getting into the nuts and bolts of how to setup QXpress Online, there is no better way to get familiar than to do a *very* quick A to B tutorial.

Tutorial: Scheduling a work order and posting an invoice to QuickBooks

Step 1: Synchronizing with QuickBooks

First things first, if you have not already synchronized your QXpress Online with QuickBooks, you must do so before continuing with this tutorial. If you have not done so already, go to the **QuickBooks** Tab, and click on the **Synchronize** Tab Link and follow the installation steps to install the Method Integration Engine and complete a full synchronization with QuickBooks. Make sure that you close and reopen QuickBooks after the initial synchronization is complete so that the real-time synching is activated.

Step 2: Scheduling your first Work Order

In this step we'll create a new work order in My Calendar.

1. Click the **Field Service Center** tab.
2. Click the **My Calendar** tab link.
3. Click the **Calendar** tab on the *My Calendar* screen.
4. Click inside the calendar and while holding down your mouse drag down the duration you want to schedule for.
5. Right-click with your mouse on the selected area and choose **New**.
6. In the **Job Name** field, type "Service Call".
7. Choose a customer from the **Customer** dropdown.
8. In the *Job Items* grid, select an **Item** that you want to appear on your work order and on your invoice.
9. Finalize any changes to the selected Item, such as the Description or Rate.
10. Click **Update** for that line item.

11. Optional: enter any additional line items, ensuring that you click Update after each one.

Step 3: Printing your Work Order

In this step we'll print your work order.

1. While still in the *Add / Edit Work Order* screen, click **Print Work Order**.
2. The work order should appear in a PDF preview.

Step 4: Create an Invoice and post to QuickBooks

In this step we'll turn the work order into a QuickBooks invoice.

1. While still in the *Add / Edit Work Order* screen, click **Create Invoice**.
2. Set your preferences here, ensuring that for this tutorial **Set to wait for sync approval** is *unchecked*. This will ensure that the invoice goes to QuickBooks instantly.
3. Click **Create Invoices**.
4. If asked to be taken to the Invoice List, click **OK**.
5. You should have been directed to the **Customer Center** tab, and to the **Invoice** tab link, and be viewing the invoice you just created.
6. Now, open **QuickBooks** and go to this customer. Under the list of this customer's transactions you should see that this invoice has already been synchronized with QuickBooks.

Step 5: Stop and Smell the Roses

If you didn't realize the significance of what happened, *stop and smell the roses!* The web browser you used to create the work order and invoice could have been anywhere in the world, and still be able to synchronize the invoice in real-time to your QuickBooks file. In fact you could have multiple staff all working from their own homes, adding jobs to their own calendars, and creating their own invoices, which all instantly synchronize back and forth with your *single copy* of QuickBooks. And the best part: all the screens you just used are completely customizable. They were all designed using the same drag and drop tools that you have access to yourself. If there was something you didn't like, change it. If there are more fields you want to add, create new fields. If there were too many fields on the screen, remove them. If you want extra actions taking place, such as a follow up call 3 days after the invoice, insert an automatic CRM activity. The sky is the limit.

Field Service Center

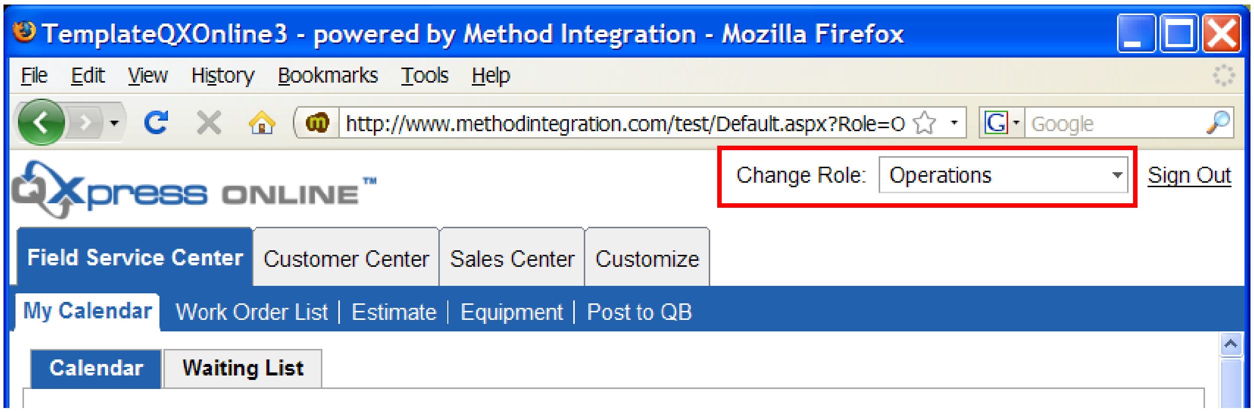
The Field Service Center serves as a one-stop location for scheduling, job costing and turning work orders into invoices.

Setting up Tab Groups / Roles & Users

Creating a Tab Group / Role

Since QXpress Online gives you not just Field Service operations but also your entire QuickBooks and CRM activities, you should be very careful to consider *who* needs to access *what*. For example, most of the users of QXpress Online at your company will only need access to customers, work orders and sales activities. Therefore when they sign in, you may choose to hide everything else from them. To do this, you need to setup roles. In the example below, a Tab Group / Role has been setup called "Operations" so that when it is chosen only the *Field Service Center*, *Customer Center* and *Sales Center* tabs are available.

Tip: you could get even more restrictive by only having the Field Service Center in the Operations role, and then customize the Field Service Center tab and add only necessary screens like the Customer List to the Field Service Center.



Creating a new Tab Group / Role

1. Click the **Customize** tab. If you don't see the Customize tab, change the Tab Group / Role in the top right to 'Admin'.
2. Click the **Tab Group / Roles** tab link.
3. Give the new Tab Group / Role a **name**, like "Operations".
4. Click **Continue**.
5. Select which of your existing users can see this Tab Group / Role.
6. Select which of your tabs will be shown when this Tab Group / Role is selected.
7. Use the **Move arrows** to change the order the tabs will appear in. For example, you may wish to move Field Services to the top so that it is the first Tab they see when they sign in.
8. Click **Add Tab Group / Role**.
9. In the top right corner, beside **Change Role**, select your newly created Tab Group / Role to ensure the appropriate tabs are shown.

Setting up Users

A user is any employee or subcontractor you assign tasks to. Typically, setting someone up as a user will grant them access to QXpress Online so that they can sign in, view their scheduled work, print route lists and work orders, as well as enter completed job details.

In field service terminology, a user is equivalent to "Tech", "Crew Leader", "Team Leader" or "Foreman".

Note: since increasing the number of users able to sign into Method will also increase your monthly subscription, you may choose to setup users as being Inactive so that they can still be assigned work, but cannot sign in.

Creating a new User

1. Click the **Customize** tab. If you don't see the Customize tab, change the Tab Group / Role in the top right to 'Admin'.
2. Click the **Users** tab link.
3. Enter a new **User Name**.
4. Click **Continue**.
5. Follow the steps on the screen. Pay special attention to step 8 and step 9. Here you can both allow the user to only have access to certain Tab Groups / Roles, and also set the default Tab Group / Role that the user will see when they first sign in.
6. Click either **Add User & email invitation** or **Add User**.
7. The **Edit Settings** screen will appear.
8. Click **Previous** to go back to Step 1, and for Link to Employee / Vendor / OtherName (optional), choose a QuickBooks employee or vendor to link this user to.
9. Go through each step of the wizard and carefully set privileges for this user.

Editing settings for a User

1. Click the **Customize** tab. If you don't see the Customize tab, change the Tab Group / Role in the top right to 'Admin'.
2. Click the **Users** tab link.
3. In the **Edit an existing User** section, click **Edit** beside the user.
4. For Link to Employee / Vendor / OtherName (optional), choose a QuickBooks employee or vendor to link this user to.
5. Go through each step of the wizard and carefully set privileges for this user.

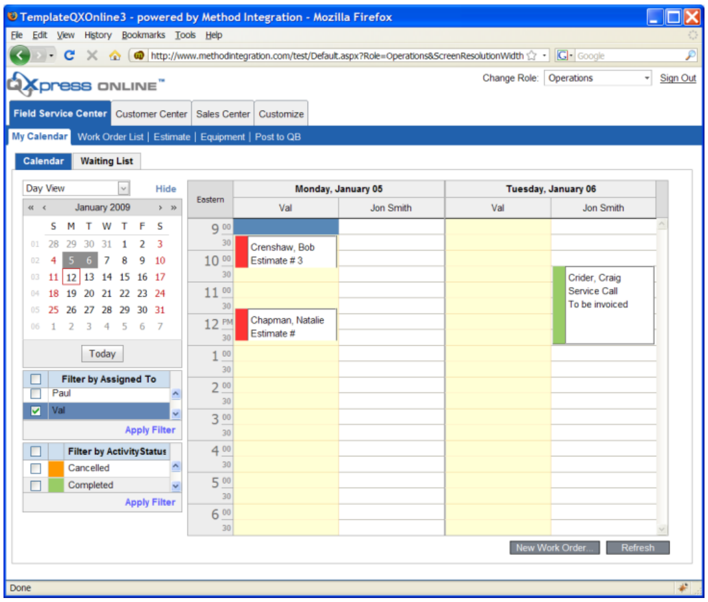
Scheduling

Scheduling work is the core of all operations carried out in the Field Service Center. When you are scheduling work to be performed, a new job will be created, and the details will be printed or emailed. When the work has been completed, the scheduled job will be edited to include job costing information such as start and stop times. Finally the job is turned into a QuickBooks invoice.

Scheduled jobs can either be One Time (such as a Service Call or Sprinkler Repair) or it can be Recurring (such as a weekly gardening visit, monthly service charge, quarterly treatment, or annual spring clean). One Time jobs have a single start and end date. Recurring jobs have multiple visits, either at specific repeating intervals, or specified random visits.

Tip: as mentioned earlier, we highly recommend you use FireFox (www.GetFireFox.com) instead of Internet Explorer to enhance the performance of QXpress Online.

Adding a Work Order to My Calendar



Using the New Work Order button

1. Click the **Field Service Center** tab.
2. Click the **My Calendar** tab link.
3. Click the **Calendar** tab on the *My Calendar* screen.
4. Click **New Work Order**….
5. In the *Add / Edit Work Order* screen, enter job details and job items and then click **Save & Close**. *For an explanation of the fields on the Add / Edit Work Order screen, see "Editing a Work Order" later in this chapter.*

Dragging and right-clicking

1. Click the **Field Service Center** tab.
2. Click the **My Calendar** tab link.
3. Click the **Calendar** tab on the *My Calendar* screen.
4. Click inside the calendar and while holding down your mouse drag down the duration you want to schedule for.
5. Right-click with your mouse on the selected area and choose **New**.

6. In the *Add / Edit Work Order* screen, enter job details and job items and then click **Save & Close**. *For an explanation of the fields on the Add / Edit Work Order screen, see "Editing a Work Order" later in this chapter.*

Using the Waiting List

The "Waiting List" contains a list of all jobs that are waiting to be dispatched to the best day, time and user. If you don't know exactly *when* you can do the job, put it into the Waiting List. Jobs in the Waiting List are simply jobs that have been assigned to any "Waiting" status. You can create your own statuses such as "Waiting to be dispatched", "Waiting to be approved by customer" or "Waiting for parts" - so long as there is a "Waiting" in the status name.

How do I add a Work Order to the Waiting List?

1. From either *My Calendar*, or the *Work Order List*, click **New Work Order…**.
2. In the *Add / Edit Work Order* screen, enter job details and job items.
3. Make sure the status you choose has "Waiting" in the name. *If you want to create a new status, click the "…" on the Status dropdown*.
4. Click **Save & Close**.

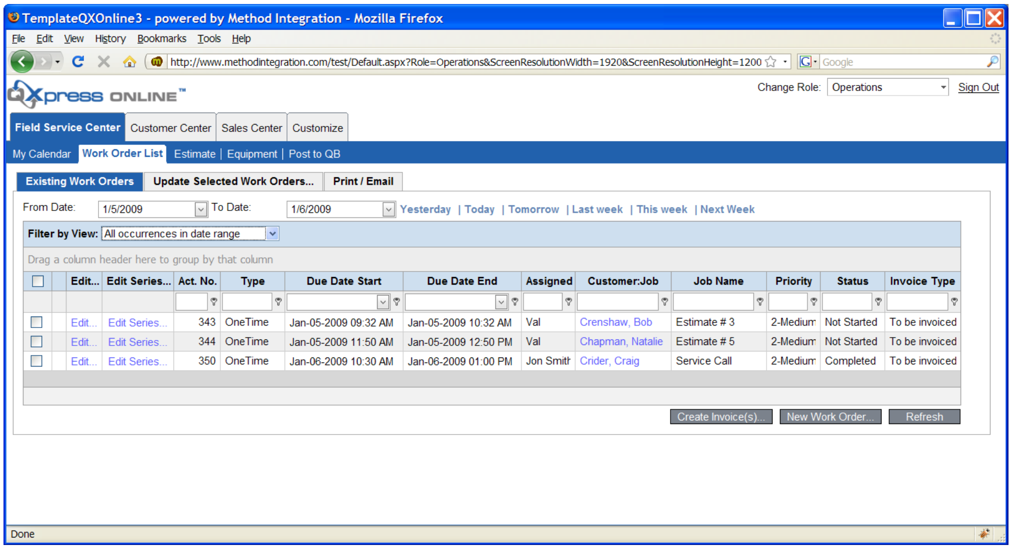
-or-

1. Edit any existing work order.
2. Change the status to one that has "Waiting" in the name.

How do I move a job from the Waiting List to My Calendar?

1. Click the **Field Service Center** tab.
2. Click the **My Calendar** tab link.
3. Click the **Calendar** tab on the *My Calendar* screen.
4. Click inside the calendar in an open appointment area. You should see the selector turn blue on the time block you have clicked on.
5. Click the Waiting List tab on the *My Calendar* screen.
6. Find the work order you want to send to the calendar.
7. Click the **Send to Calendar** line next to that work order. You should now see the work order has been moved to the Calendar for the time, day and user you selected.

Adding a Work Order to the Work Order List



Using the New Work Order button

1. Click the **Field Service Center** tab.
2. Click the **Work Order List** tab link.
3. Click the **Existing Work Orders** tab on the *Work Order List* screen.
4. Click **New Work Order…**.
5. In the *Add / Edit Work Order* screen, enter job details and job items and then click **Save & Close**. *For an explanation of the fields on the Add / Edit Work Order screen, see "Editing a Work Order" later in this chapter.*

How do I turn an Estimate into a Work Order?

Instead of starting the process with a scheduled job, you can begin by creating an estimate and converting it into a work order. *As you continue reading, you will discover more about QXpress Online's in-depth CRM capabilities for creating and managing your own marketing campaigns. This will give you the tools to nurture a lead into an opportunity, then to an estimate and finally a sale.*

To create a Work Order from an Estimate

1. Click the **Field Service Center** tab.
2. Click the *Estimate* tab link.
3. Select an estimate, or create a new estimate.
4. Click Create / Go To Work Order. The *Add / Edit Work Order* screen will appear.

Tip: Although the Sales Rep, Campaign and Opportunity fields are not visible by default in the Add / Edit Work Order screen, the values still get copied to the work order so that they will eventually get copied over to the invoice. If you like, you can customize the Add / Edit Work Order screen and drag and drop these fields on.

What about a monthly billing installment (contract)?

If you charge a customer a fixed price per month for your services regardless of how many services you perform, simply setup a recurring work order to handle the billing installment as well as set up a separate recurring work order to handle each service that must be performed:

- Schedule a recurring work order for your billing installment, with the Invoice Type of "To be invoiced", and the recurring basis of "Monthly". *Tip: it might be helpful to setup a separate user who all billing installments are assigned to so that they don't get printed on route lists and work orders.*
- Schedule the services that are included in the contract price as recurring work orders, with the Invoice Type of "Do not Invoice".
- Print or email your daily route lists and work orders, as you normally would.
- At the end of the month, invoice all work orders as you normally would. In this case your billing installment prices will be included since they have the Invoice Type of "To be invoiced". The services, on the other hand, will not get invoiced since they have the Invoice Type of "Do not Invoice".

Tip: alternatively, if you do want to show your services along with the billing installment on the invoice, set your work orders to the Invoice Type of "To be invoiced" as well - just make sure the Amount is $0 so that you don't double-charge.

What about Zone-Based services?

Zone-Based services (services that are scheduled by geographical area instead of by date) in QXpress Online are handled by the Waiting status. Since both one-time work orders and recurring work orders can appear in the Waiting List you can simply do the following:

1. Schedule recurring work orders with a recurring basis of "Yearly", and status containing "Waiting".
2. In the Waiting List, filter the list by the Job Name and by the Zip Code.
3. One by one, select where in the calendar you would like to send the services, and then click **Send To Calendar**.

Tip: Alternatively, you can customize the Work Order List screen, add a Zip Code column to the grid, and update a batch of services at once to change their status to "Not Started" using the Update Selected Work Orders tab.

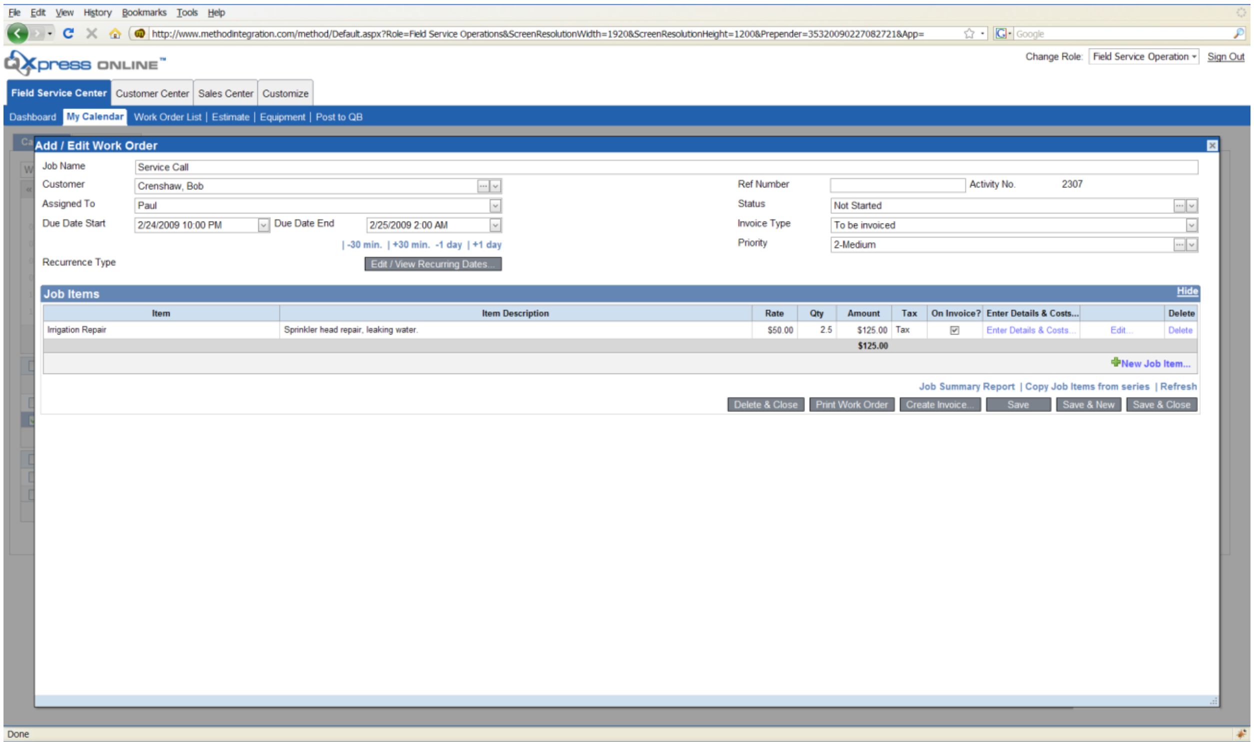
What about multi-day projects?

A project is a construction / installation job that can span many days, with multiple users and multiple tasks. With QXpress Online, you have two choices. You can schedule a one-time job that simply has the start date scheduled for the day the project begins, and an end date of when the project ends. Alternatively, you can schedule a recurring job, with a "Project" basis, and insert all the dates and users you want to assign the project to. The recurring job offers more complexity, so choose the option that works best for you.

Tip: If you schedule your project as a recurring job, it is best to treat your project as the "Series" and project visits as "Occurrences". Set the project's Invoice Type to "Do Not Invoice" on the series until all project visits are completed, at which point *edit the series, change the Invoice Type to "To Be Invoiced" and then click **Create Invoices**.*

Editing a Work Order

The *Add / Edit Work Order* screen is broken up into two sections: *Add / Edit Work Order* and *Job Items*.



Add / Edit Work Order Section

- The **Job Name** field is a short text description of the job. This will not appear on an invoice.
- The **Customer** field lists all your QuickBooks customers. Click the "…" to create a new customer or lead. *Note: by default, early versions of QXpress Online also show Employees and Vendors in this dropdown. This will be resolved in later versions once the ability to apply filters to dropdown list objects is added.*
- The **Assigned To** is the user (employee or subcontractor) this work order will be performed by.
- In the case of a *one time* job, the **Due Date Start** and **Due Date End** are the beginning and ending date of the job. The start and end time can cross over midnight, in fact it can span for many consecutive days.
- In the case of a recurring *series*, the date portions of the **Due Date Start** and **Due Date End** are the full date range of the recurring series, while the time portions are the time the job will be scheduled for each occurrence.
- In the case of a recurring *occurrence*, the **Due Date Start** and **Due Date End** are the beginning and ending date of each occurrence.

- The **Ref Number** field is useful for companies that need to make sure a "work order #" will be the same as its eventual "invoice #". If you don't require this feature, you can leave the Ref Number blank, or customize the *Add / Edit Work Order* screen and remove the field from the screen.

- The **Status** field indicates whether the job is planned, in progress, cancelled or completed. By default the following statuses come with QXpress Online: "Cancelled", "Completed", "Deferred", "In Progress", "Not Started" and "Waiting on someone else". You can add your own statuses by clicking the "…" on the status dropdown list, **but be careful, it is highly recommended that you do not rename or remove existing statuses**.

- The **Invoice Type** field indicates whether you want to invoice this job or not. By default, QXpress Online comes with "Do not Invoice", "To be Invoiced" and "Invoiced".

- The **Priority** field indicates the importance and urgency of the job. By default all jobs are assigned "2-Medium".

- The **Add / Edit Recurring Date** button allows you to specify whether a job is a one time job with only one start and end date, or a recurring job with many individual occurrences. Occurrences can be automatically scheduled on a pattern basis of "Daily", "Weekly", "Monthly", "Yearly", "Variable" and "Project". *Scheduling a bi-weekly job would be "Weekly" every two weeks, and a quarterly job would be "Monthly" every 3 months.*

Job Items Section

The *Job Items* section lists all the QuickBooks items that you want to invoice or perform job costing on. Typically, what you'll list here are all the future invoice line items for when this job is turned into an invoice.

Once you add and save your first job item, you can click the **Enter Details & Costs…** link where you can add additional information about that Job Item such as the Customer Equipment that will be serviced, the QuickBooks Class, Estimated Man hours, Cost Per Unit (for materials) or Cost Per Hour (for labor). The *Enter Details & Costs* screen is also where you'll return to later for entering job costing information when the job is completed.

Printing / Emailing Route Lists and Work Orders

Once your work is scheduled, it is time to print or email the work and give it to your users. Alternatively, they can log into QXpress Online themselves and see their own work from their laptop or PDA, or print their own route lists and work orders.

How do I print Work Orders from My Calendar?

1. Click the **Field Service Center** tab.
2. Click the **My Calendar** tab link.
3. Click the **Calendar** tab on the *My Calendar* screen.
4. Show the date range for the work orders you want to print.
5. Use the "Filter by Assigned To" filter to show multiple users in the calendar, if necessary.

6. Right-click on the work order you want to print, and click **Print Work Order(s)…**.

7. If you want to print multiple work orders at one time, left-click on each work order you want to print while holding down the SHIFT key on your keyboard, and while still holding SHIFT, right-click on one of the work orders and click **Print Work Order(s)…**.

Note: steps on how to customize the work order template are included later in this chapter.

How do I print or email Work Orders or Route Lists from the Work Order List?

1. Click the **Field Service Center** tab.

2. Click the **Work Order List** tab link.

3. Click the **Existing Work Orders** tab on the *Work Order List* screen.

4. Change the *From Date*, *To Date*, *Filter by View* to show the services you want to print.

5. If you want to only print certain work orders, put checkboxes for those work orders in the first column of the list.

6. Click the **Print / Email** tab on the *Work Order List* screen.

7. For **Which work orders?** select "All" if you want to print all work orders listed in the *Existing Work Orders* tab, or "Selected Only" if you want to print the work orders with checkboxes beside them.

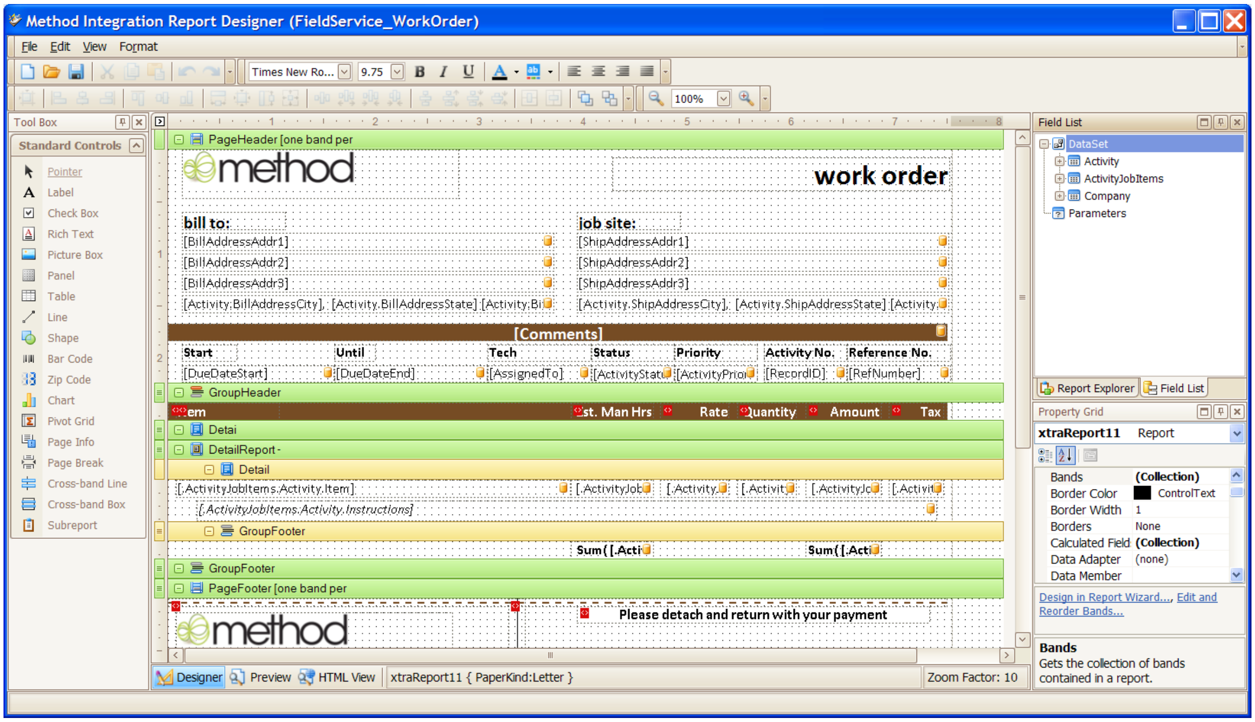
8. Click either **Print Route List**, **Print Work Orders**, or **Email Work Orders**.

9. The work orders will be converted into Adobe Acrobat PDF format. In the case of printing work orders or route lists they will be displayed on your screen for a print preview. In the case of emailing, they will be sent as an attachment.

*Note: if you use the **Email Work Order** option, the emails will be sent to the user the work order is assigned to. To make sure your users have the correct email addresses, go to Customize > Users. Also, to make sure you have setup your mail server options, click Customize > My Account.*

How do I customize route list and work order templates?

The Method Platform, which QXpress Online is built on, includes a powerful report designer. This allows you to create your own route lists, work orders, invoices and reports, as well as modify existing ones.



1. Click the **Field Service Center** tab.

2. Click the **Work Order List** tab link.

3. Click the **Print / Email** tab on the *Work Order List* screen.

4. Click **Customize Templates**. *Alternatively, if you have already used the Method Report Designer on this computer, in Windows click Start > All Programs > Method > Method Report Designer*.

5. If you are using Internet Explorer, click **Launch App**. If you are using FireFox, click **Save File**, and then double-click on the MethodReportDesigner icon.

6. In the *Method Report Designer*, click **File > Open**.

7. Enter your *Method Account* name, *User name*, *Password* and click **Connect**.

8. Choose the template you want to customize and click **Open**.

9. It is advisable that you first make a backup of the original template. To do this, click **File > Save As**, give the original template a new Report name, like "FieldService_RouteList_bkJan10-2009". Then click **Create New Report**. Now go back to the original template by going to **File > Open** again and choosing the original template.

10. Modify the template by dragging over fields from the *Field List* on the right or dragging over objects from the *Standard Controls* on the left. *The designer is fairly intuitive, but the advanced features are outside the scope of this Quick Start Guide. Keep an eye on the Method website at http://www.methodintegration.com/web/self-service-documentation.aspx for additional documentation on how to best use the Method Report Designer.*

11. Click **File > Save**.

Note: If you renamed the template, or want to use a different template when printing or emailing, you must do the following:

1. Go to **Customize > Screens**.
2. Click the **Edit** link beside the screen. *Tip: all Field Service screens have a name beginning with "FieldService_"*.
3. Edit the button or calendar event that you use to create the PDF.
4. Edit the "Generate Report" action to use the new report template name.

Tip: You can also install the report designer directly by going to:
http://www.methodintegration.com/MethodReportDesigner/setup.exe
If you already have it installed, you can go to:
http://www.methodintegration.com/methodreportdesigner/methodreportdesigner.application

Completing work

When work has been completed in the field it is up to either the user to update their own work orders, or it is up to office staff to do it for them. Completing work entails changing the status of work orders to "Completed", entering in any additional job items that need to be charged, altering any quantities of existing job items, entering in start and stop times for the user and their team, and finally creating an invoice.

How do I reschedule work orders I couldn't get to?

If you couldn't get to all the scheduled work, simply move the jobs to the date you plan on doing them. You can do this from either the *My Calendar* screen or *Work Order List* screen.

Rescheduling from My Calendar

1. Click the **Field Service Center** tab.
2. Click the **My Calendar** tab link.
3. Click the **Calendar** tab on the *My Calendar* screen.
4. Click on the work order you want to reschedule and drag it to the new date. *If the new date is not visible, either expand the date range, or double-click on the work order to edit it, and change the date in the Add / Edit Work Order screen.*

Rescheduling from the Work Order List

1. Click the **Field Service Center** tab.
2. Click the **Work Order List** tab link.
3. Click the **Existing Work Orders** tab on the *Work Order List* screen.
4. Put a checkbox beside each work order you want to reschedule.
5. Click the **Update Selected Work Orders** tab on the *Work Order List* screen.
6. Uncheck the *Change Status to* checkbox.

7. Check the *Move to date* checkbox.
8. Change the date to desired new scheduled date for this work orders.
9. Click **Update Selected Work Orders…**.

How do I skip/cancel services I'm not going to do?

If you will not be performing the intended work order, or are going to "skip" this occurrence until next time it is scheduled, can you simply change the status of the work orders to "Cancelled".

Cancelling from My Calendar

1. Click the **Field Service Center** tab.
2. Click the **My Calendar** tab link.
3. Click the **Calendar** tab on the *My Calendar* screen.
4. Right-click on the service you want to cancel, and choose **Change Status > Cancelled**.
5. If you want to cancel multiple work orders at one time, left-click on each work order you want to cancel while holding down the SHIFT key on your keyboard, and while still holding SHIFT, right-click on one of the work orders and click **Change Status > Cancelled**.

Cancelling from the Work Order List

1. Click the **Field Service Center** tab.
2. Click the **Work Order List** tab link.
3. Click the **Existing Work Orders** tab on the *Work Order List* screen.
4. Put a checkbox beside each work order you want to cancel.
5. Click the **Update Selected Work Orders** tab on the *Work Order List* screen.
6. Make sure that the *Change Status to* checkbox is checked.
7. Change the status to "Cancelled" in the *Change Status to* dropdown.
8. Click **Update Selected Work Orders…**.

How do I set completed work to "Completed"?

Once work orders have been completed, you'll want to update the work order's *Status* field to "Completed".

Completing from My Calendar

1. Click the **Field Service Center** tab.
2. Click the **My Calendar** tab link.
3. Click the **Calendar** tab on the *My Calendar* screen.

4. Right-click on the service you want to complete, and choose **Change Status > Completed**.

5. If you want to complete multiple work orders at one time, left-click on each work order you want to complete while holding down the SHIFT key on your keyboard, and while still holding SHIFT, right-click on one of the work orders and click **Change Status > Completed**.

Completing from the Work Order List

1. Click the **Field Service Center** tab.

2. Click the **Work Order List** tab link.

3. Click the **Existing Work Orders** tab on the *Work Order List* screen.

4. Put a checkbox beside each work order you want to complete.

5. Click the **Update Selected Work Orders** tab on the *Work Order List* screen.

6. Make sure that the *Change Status to* checkbox is checked.

7. Change the status to "Completed" in the *Change Status to* dropdown.

8. Click **Update Selected Work Orders…**.

Completing by editing the individual work orders

If you are entering job cost information, the best way to complete a work order is in the *Add / Edit Work Order* screen since you'll need to come here anyway to enter start and stop times, and actual inventory usage.

1. Edit the work order from either the *Work Order list*, or *My Calendar* screen.

2. Change the *Status* field to "Completed".

3. Finish making any other changes to the work order.

4. Click **Save & Close**.

How do I enter start and stop times?

Recording the actual time users arrived at a property, and the actual time they left helps for two purposes: (1) the start and stop times can be used for job costing, so you know the profitability of your services; and (2) the duration of the times can be sent to QuickBooks as a TimeTracking transaction, useful for payroll.

The Enter Actual Hours / Time Tracking tab

All start and stop times related to a work order should be entered into the *Enter Actual Hours / Time Tracking* Tab of the *Add / Edit Work Order* screen. To get to this area:

1. Edit the work order from either the *Work Order list*, or *My Calendar* screen.

2. In the *Job Items* grid locate a service item you want to record time for, and click **Enter Details & Costs**.

3. Click the **Enter Actual Hours / Time Tracking** tab on the *Enter Details & Costs* screen.

Entering times for multiple services at once

Users of desktop versions of QXpress may be used to the “Job Cost TimeSheet”. There is no Job Cost Timesheet in QXpress Online. Instead, there is the ‘Job Cost Selected’ option.

1. In the *Work Order list*, select the services you want to enter start and stop times for.
2. Click **Job Cost Selected**…
3. In the *Enter Actual Times / Time Tracking* tab, choose the employee(s) to enter the start and stop time for, and click **Enter Time**.
4. Click **Save & Next** to move onto the next job item.

Entering Default Time Track Settings

In the *Enter Actual Hours / Time Tracking* tab on the *Enter Details & Costs* screen, click **Default Time Track Settings**.

- The **Is Waiting For Sync Approval (Time Tracking)** field sets whether TimeTracking activities are defaulted to send directly to QuickBooks, or if they wait for someone to approve them first.
- The **Billable Status (Time Tracking)** field sets whether TimeTracking entries are *Billable* by default. Most field service companies should have this set to “NotBillable”.
- The **Payroll Item (Time Tracking)** field sets the default *Payroll Item* for new TimeTracking entries.
- The **Labor Cost Per Hour** field sets the default job cost labor rate for your field service staff. Typically this is an average of your staff’s labor cost per hour, plus an overhead allocation per hour.

  Note: When you are finished setting your defaults, you won’t see your changes take place until next time you close and re-open the Edit Details & Costs screen.

Entering Default Team Members

Often, in the field service industry, staff don’t work alone – they work in teams or crews. QXpress Online is not designed, by default, to schedule work for crews, rather it is setup to schedule work for the foremen / crew leaders.

When you are recording TimeTracking for your staff, you can specify multiple staff members at once to save from unnecessary data entry. In addition, you can setup “Default Team Members” who will automatically appear for you when you are recording time for a user.

1. In the *Enter Actual Hours / Time Tracking* tab on the *Enter Details & Costs* screen, click **Edit Team Member Defaults…**.
2. In the *Team Members* screen, give your team a **Team Name**.

3. Choose the **Team Leader (User)**.

4. For **Employee / Vendor 1**, choose the QuickBooks employee or vendor represented by the Team Leader (User).

5. For **Employee / Vendor 2 through 5**, choose the other team members.

6. Click either **Save & New** if you want to setup additional teams, or **Save & Close**.

7. To see your default settings take place, close and re-open the *Edit Details & Costs* screen.

Entering a Time Tracking Entry

Once you have setup your Team Member Defaults and Default Time Track Settings, you are ready to record time.

1. Go to the **Enter Actual Hours / Time Tracking** tab on the *Enter Details & Costs* screen.

2. For **Employee / Vendor 1 through 5**, ensure the appropriate employees / vendors are selected. *These should have already been filled in for you if you had setup Team Members*.

3. For **Start Time**, enter the time the team actually arrived.

4. For **End Time**, enter the time team actually finished.

5. When you exit the End Time field the **Duration** should be automatically calculated for you. At this point, you can override the Duration if you like. *In fact, you can skip entering Start Time and End Time if you only want to type Duration in*.

6. Enter the **Date** the time entry occurred.

7. Enter the QuickBooks **Class**, **Payroll Item** and **Billable?**.

8. For **Wait for Sync Approval?** choose whether you want the TimeTracking entry sent to QuickBooks as soon as you click **Enter Time**. If you have a check in the *Wait for Sync Approval?* checkbox the time entry will not be sent to QuickBooks until you remove the check under the *Post to QB* screen.

9. You'll be taken back to the **Job Item Details** tab. You should see the Act Man Hrs has been updated for you.

10. Click **Calculate** to compute the total **Cost** for the Job Item.

11. Click **Save & Close**.

Billing the customer by the hour

If you charge your customer an hourly rate based on how many Actual Man Hours were performed on the job, simply do the following:

1. Go to the **Job Item Details** tab on the *Enter Details & Costs* screen.

2. Click **Copy to Qty**.

3. You should now see the Qty and Amount has been updated on the left hand side.

4. Click **Save & Close**.

How do I enter inventory / non-inventory costs?

Materials are considered to be any Job Item that has the QuickBooks Item Type of either "Inventory", "NonInventory" or "InventoryAssembly".

1. Edit the work order from either the *Work Order list*, or *My Calendar* screen.

2. In the *Job Items* grid locate a service item you want to record time for, and click **Enter Details & Costs**.

3. Click the **Job Item Details** tab, and click **Calculate**. This will get the default purchase cost of the item from QuickBooks and multiply the cost by the Qty of units used, to arrive at a final **Cost** field. If you like you can override the *Cost Per* and the *Cost* fields with whatever value you want to enter.

4. Click **Save & Close**.

Using the Job Summary Report

The *Job Summary Report* gives you an excellent overview of all the Job Items in a work order, as well as the estimated vs. actual hours, and profitability of each item.

1. Edit the work order from either the *Work Order list*, or *My Calendar* screen.

2. Click the **Job Summary Report** link, below the *Job Items* grid.

3. The Job Summary Report should appear in an Adobe Acrobat PDF print preview.

Using Job Costing Reports

In additional to the *Job Summary Report*, two other job costing reports come built into QXpress Online, *Est. Vs. Act. Man Hrs By Customer* and *Job Cost Profitability by Customer*. To access these reports:

1. Click the **Field Service Center** tab.

2. Click the **My Calendar** tab link.

3. Click the **Print / Email** tab on the *Work Order List* screen.

4. Click on either **Est. Vs. Act. Man Hrs By Customer** or **Job Cost Profitability by Customer**.

5. The report should appear in an Adobe Acrobat PDF print preview.

Creating Invoices

Once a work order has been created, the customer chosen and all the invoice-able job items have been listed –the information necessary to create an invoice now exists.

Creating a single invoice from the Add / Edit Work Order screen

1. Edit the work order from either the *Work Order list*, or *My Calendar* screen.

2. Make sure your **Invoice Type** is “To be invoiced”.

3. Make sure you have at least one *Job Item* that has a checkbox under **On Invoice?**.

4. Click **Create Invoice…**.

5. Set your preferences. The **Set to wait for sync approval** checkbox is important. If you put a check in here, the invoices will not go over to QuickBooks right away. They will sit waiting in the *Post to QB* screen for you to approve them. If you do not have a checkbox here, the invoices will immediately be ready to send to QuickBooks, and if QuickBooks is open and connected to QXpress Online, the invoices will sync instantly.

6. Click **Create Invoices…**.

7. A message will appear telling you how many invoices were created, and will ask if you want to be taken to the *Invoices* screen to view your invoices.

Creating a batch of invoices from My Calendar

1. Click the **Field Service Center** tab.

2. Click the **My Calendar** tab link.

3. Click the **Calendar** tab on the *My Calendar* screen.

4. Show the date range for the work orders you want to turn into invoices.

5. Use the “Filter by Assigned To” filter to show multiple users in the calendar, if necessary.

6. Right-click on the work order(s) you want to invoice, and click **Create Invoice(s)…**.

   *Note: If you want to invoice multiple invoices at one time, left-click on each work order you want to invoice while holding down the SHIFT key on your keyboard, and while still holding SHIFT, right-click on one of the work orders and click **Create Invoice(s)…**.*

   Tip: The invoicing process will automatically combine multiple work orders for the same customer onto a single invoice when they are selected and invoiced in the same batch.

Creating a batch of invoices from the Work Order List

1. Click the **Field Service Center** tab.

2. Click the **Work Order List** tab link.

3. Make sure all the work orders you want to invoice are listed in the grid.

   *Tip: One common way to do this is to change the **Filter by View** to “All Completed and To Be Invoiced”, since it is likely that the work orders you* *want to invoice have the status of "Completed". Note, however, that work orders can be invoiced regardless of their current status, and there is nothing preventing you from invoicing work orders long before they have been performed.*

4. If you want to invoice all work orders listed, even those on other pages of the grid, click **Invoice All…**.

   If you want to invoice only certain invoices, put a check in all the checkboxes beside the work orders you want to invoice, and click **Invoice Selected…**.

   Tip: By clicking the checkbox in the grid header it will put a check in all the checkboxes on the current page. Also, as you go from page to page in the grid, it saves the checkboxes from previous pages.

Approving Invoices waiting for sync approval

When creating invoices, if you had the preference of *Set to wait for sync approval* checked, the invoices do not get sent over to QuickBooks until you approve them. Approving the invoices is an easy process when done from the *Post to QB* screen.

1. Click the **Field Service Center** tab.
2. Click the **Post to QB** tab link.
3. Place a check in the checkbox beside all the invoices you want to approve.

   *Tip: If you want to view the invoice first, click **Go to…**.*

4. Click **Approve selected invoices**. This will remove the invoices from this list and allow them synchronize with QuickBooks.

Sales Center (CRM)

Overview

Since QXpress Online is built on the Method platform, it gets to take advantage of the built-in functionality, such as the CRM features. "CRM" broadly stands for "Customer Relationship Management", but in the context of QXpress Online it should be thought of as a way get more customers and keep the ones you have.

This is the third time this guide mentions FireFox, but it is in the Sales Center that you most notice the most difference in speed between FireFox and Internet Explorer. If you still haven't started using FireFox, you get one last reminder, visit (www.GetFireFox.com) and start using it instead of Internet Explorer.

Note: this guide only touches on the Sales Center. To get a full guide on MethodCRM, visit: http://www.methodintegration.com/web/self-service-documentation.aspx

Why use QXpress Online for CRM?

You should be using some kind of software to help you track conversations with customers, follow up reminders, and how customers heard about you. This will not only make sure customer requests and sales opportunities don't fall through the cracks, but also ensure that you can assign some success rate to the marketing dollars you spend. This is just a small taste of what CRM software can do.

The problem with CRM software today for small businesses, however, is that there is little or no integration between all your pieces. You use QuickBooks for your accounting, a 3rd party program for your industry-specific operations, and usually a separate 3rd party program for your CRM. CRM apps are typically more company-specific as they tend to offer lots of flexibility in terms of custom fields and tracking requirements, since most companies feel that the tactics they use to get and retain customers are unique and are what separates them from their local competition.

All these separate programs, however, each only tell you a portion of the full story.

Because QXpress Online is built on the Method platform, all three functions become very interconnected. Since Method is a web-based mirror of your QuickBooks data, contains built-in CRM, and is the same platform used to create QXpress Online, everything either already talks to each other, or can be customized to talk to each other in a manner specific to your company's needs.

Campaigns

Campaigns are marketing initiatives you setup and track. This could be a paid advertising campaign, such as "Door Hangers March 2009" or an in-house sales campaign such as "Revisit lost 2008 opportunities", or even an ongoing lead type campaign such as "Word of mouth".

To create a new campaign:

1. Click the **Sales Center** tab.
2. Click the **Campaigns** tab link.
3. Click the **Add / Edit Campaign** tab in the *Campaigns* screen.
4. Give your Campaign a unique **Name**.
5. Optionally, set the **Type**, **Status** and **Description**.
6. Click the **Planning & Analysis** tab in the *Campaigns* screen.
7. Optionally, set the **Start Date**, **End Date**, **Expected Response Percent**, **Expected Revenue** and **Budgeted Cost**.
8. Click back on the **Add / Edit Campaign** tab in the *Campaigns* screen and click **Save & New**.

Opportunities

Sales Opportunities should be entered whenever a customer or potential customer (lead) has expressed interest in doing some business with you. By entering a Sales Opportunity, you can assign a dollar value and a likelihood that the sale will close, as well as track all conversations, emails and follow-up reminders related to making sure you close the sale.

Your Sales Opportunity Pipeline is the total value of all your un-closed opportunities multiplied by the probability percentage they will close.

For an example of an opportunity, consider that a neighbor of a customer of yours expresses interest in your services, or an existing customer asks for details about an optional service you offer. In both scenarios there will be a sales cycle that may last a few days, a few weeks or a few months. Either way, you will not want to let the opportunity fall through the cracks or go undocumented, and you will want to know whether you succeeded in closing the sale (won) or whether you did not (lost).

To create a new opportunity:

1. Click the **Sales Center** tab.
2. Click the **Opportunities** tab link.
3. Click the **Add / Edit Opportunity** tab in the *Opportunities* screen.
4. Give your opportunity a unique **Name**.
5. Choose the **Customer** the opportunity is for. If this is a new customer or lead, click the "…" button on the *Customer* dropdown list.
6. Choose the **Stage** the opportunity is currently at.
7. Choose the **Close Date**, which is the date you hope to close the deal by.
8. Choose the **Campaign** this opportunity is related to. Although this is optional, it is best practice to always have some kind of campaign to attribute an opportunity to.
9. Optionally enter a **Description**, **Type**, **Probability Percent** (the chance you think this has of becoming a sale), the **Amount** (the revenue you expect this will bring your company if sold), the **Lead Source** and the **Next Step** (the next action you plan on taking in the sales process).
10. Click **Save & New**.

Leads

Leads are simply customers that have not yet been sent to QuickBooks. You can therefore have thousands of potential customers as "leads" in QXpress Online and only have a few hundred actual customers in QuickBooks.

Customers have an "Is Lead Status Only" field. When this is checked for new customers, the syncing engine knows not to sync it to QuickBooks, and therefore it remains a "Lead" in QXpress Online. If you later manually uncheck the checkbox and save the customer, it will instantly sync to QuickBooks.

Also, if you create any transaction (such as an Invoice, Payment, Estimate, etc.) that involves this customer, the Is Lead Status Only field will automatically be unchecked for you behind the scenes and the customer will be sent to QuickBooks along with the transaction. The only exception to this is when the transaction also has *Waiting For Sync Approval* checked – meaning the customer doesn't have to be sent to QuickBooks until the transaction is approved and sent to QuickBooks.

Tip: if you want to limit the amount of customers going into QuickBooks, your best practice is to (a) Set your new customers with Is Lead Status Only checked, (b) Create your estimates in QXpress Online, but have the Waiting for Sync Approval checked, and (c) print your estimate directly from QXpress Online.

Activities

Activities are every conversation, event, task, and follow up reminder you have with your customers. In fact, the work orders used in QXpress Online are actually stored as Activities with the Activity Type of "Work Order".

Activities can relate to opportunities so that you can track each conversation you have had related to closing a sale, as well as regular customer contact, service and history tracking.

Tip: for advanced customer service tracking, use the Call Center which allows you to create a customer service "Case" for a complaint or problem, and track all activities related to that case until the problem is resolved.

To create a new sales related activity:

1. Click the **Sales Center** tab.
2. Click the **Sales Center Dashboard** tab link.
3. Click the **My Opportunity Pipeline** tab in the *Sales Center Dashboard* screen.
4. Click **Go to…** beside one of the opportunities you want to record an activity for.
5. Click the **Activities** tab in the *Opportunities* screen.
6. Click **New Activity**.
7. Enter **Comments** describing the conversation or event.
8. Change any other values, as desired, in the **Add / Edit Activity** tab.
9. If you want to send an email to the customer when the activity is saved, click the **Send an Email** tab and choose or create an email template from the *Send using email template* dropdown.
10. If you want to schedule a second follow-up activity, click the **Schedule a Follow Up** tab, and fill out the necessary fields.
11. If this activity is one that will repeat with this customer at a scheduled interval, click the **Recurrence Info** tab.
12. Click back on the **Add / Edit Activity** tab and click **Save & Close**.

Tutorial: Sales Lifecycle

This tutorial will take you from A to B for a sales lifecycle. It will begin with creating a campaign, to entering a lead, to creating an estimate, to creating a work order, to creating an invoice and finally to a follow up call to the customer.

Step 1: Creating a Campaign

In this step we'll create a marketing campaign aimed at getting new customers.

1. Click the **Sales Center** tab.

2. Click the **Campaigns** tab link.
3. Click the **Add / Edit Campaign** tab in the *Campaigns* screen.
4. Give the campaign the **Name:** "Knock on doors 2009".
5. Click on the **Planning & Analysis** tab in the *Campaigns* screen.
6. Enter an **Expected Revenue** of $10,000.
7. Click **Recalculate**.

Step 2: Creating an Opportunity and Lead

Your sales staff knocks on the door of John Doe, a neighbor of one of your existing customers, and he says he might be interested in your service, and gives you his address and phone number for you to follow up with.

1. Click on the **Opportunities** tab in *Campaign* screen.
2. Click **New Opportunity**.
3. Give the opportunity the **Name**: "Sell to John Doe".
4. Click the "…" on the *Customer* dropdown.
5. Click **New Lead (Customer)…**.
6. Give your lead the **Name**: "John Doe".
7. Click **Save & Close**.
8. For **Stage**, enter: "Prospecting".
9. For **Close Date**, enter a date 1 month from now.
10. Since John sounded very eager, for **Probability Percent**, enter: 50.
11. For **Amount** enter: 1000.
12. For **Next Step**, enter: "get John to agree to receiving an estimate".
13. Click on the **Activities Tab** of the Opportunities screen, and click **New Activity** to enter a new activity.
14. Fill out the necessary fields of the new activity. For **Comments**, enter: "we met with John, he is excited, but wants a call later today to find a date his wife will be home for an estimate." For **Status**, choose "Completed". For **Assigned To**, choose yourself.
15. Under the **Schedule a Follow Up** tab, put a check in the *Create a follow-up* checkbox, and fill out the rest of the follow-up fields. For the **Follow-up Comment**, enter: "Call to see when wife is home for estimate". <u>Also make sure the **Follow-up Date** is later today, not a future date.</u>
16. Under the **Add / Edit Activity** tab, click **Save & Close**.

Let's now see how your campaign has been affected:

17. Click on the **Campaign** tab.

18. Click the **Select** link for your "Knock on doors 2009" campaign.

19. Under the **Planning & Analysis** click **Recalculate**. You'll see you now have 1 lead, and 1 total opportunity – and no opportunities that are won or lost.

20. Click on the **Opportunities** tab in the *Campaign* screen. You'll see you now have 1 opportunity listed.

21. Click the **Activities** tab in the *Campaign* screen, and you'll see 2 activities listed.

Step 3: Creating an Estimate

In this step we'll follow up with John Doe, and create and print an estimate.

1. Click the **Sales Center** tab.

2. Click on the **Sales Center Dashboard**.

3. Click the **My Activities** tab in the *Sale Center Dashboard* screen.

4. Click **Refresh**. Here we have all activities that have not yet been dealt with.

5. Click on the **Opportunity No.** link for the follow up phone call activity. This will take you into the *Opportunity* screen.

6. Click the **Activities** tab in the *Opportunities* screen.

7. Click the **Go to…** link next to your follow up Activity.

8. Change the **Status** to "Completed".

9. For the **Comment** enter "we agreed to do an estimate later tomorrow – will follow-up next week".

10. Schedule a follow-up activity for next week to check on the estimate, and hopefully close the sale.

11. Click **Save & Close**.

12. Click on the **Estimates** tab in the *Opportunities* screen.

13. Click **New Estimate**.

    *Tip: Since the Estimate screen in QXpress Online offers more than the regular estimate, you may wish to customize this screen and change the actions on the New Estimate button so that they direct you to the **Field Service Center >> Estimate**, instead of the Customer Center >> Estimate.*
    -or
    *You could go to **Customize > Tabs**, and modify the Customer Center tab so that the Estimate tab link now points to "FieldService_Estimate" instead of "Estimate".*

14. Enter some line items for your estimate.

15. Click **Save**.

16. Click **Print Preview** to generate a printable PDF of your estimate. *Of course, just like all printable templates like invoices, reports, route lists and work orders, the estimate template is customizable via the Method Report Designer.*

Step 4: Turning the Estimate into a Work Order

Before you get a chance to follow up with John, he calls you back the next day and wants you to go ahead with the estimate. What we need to do is track the conversation as an activity, update the opportunity's stage, and turn the estimate into a scheduled work order.

1. Click the **Sales Center** tab.
2. Click the **Opportunities** tab link.
3. Click the **Select** link next to the "Sell to John Doe" opportunity.
4. Click the **Activities** tab in the *Opportunities* screen.
5. Click **Go to…** next to next week's follow up call. Here you can update the **Status** to "Cancelled", and enter a comment saying that you cancelled the follow up because John called you directly, and then click **Save & Close**.
6. Click **New Activity** and create a new activity tracking today's conversation with John, as well as schedule a follow up activity with John in a week's time to see if he was happy with his service, and to see if you can meet any more of his service needs.
7. In the **Add / Edit Opportunity** tab change the **Stage** to "Closed Won".
8. Click **Save**.
9. Click the **Field Service Center** tab, and then the **Estimate** tab link.
10. Click **Select** next to John Doe's estimate.

*Tip: Alternatively, you could customize the Opportunities screen, Activities grid, and the actions of the Go to… column so that instead of going to the Customer Center >> Estimate, it takes you to **Field Service Center >> Estimate**, that way you would be taken straight to your field service estimate.*
-or
*You could go to **Customize > Tabs**, and modify the Customer Center tab so that the Estimate tab link now points to "FieldService_Estimate" instead of "Estimate".*

11. Click the **Create / Go To Work Order** link. This will copy the estimate and create a new work order to give to your crews.

Tip: Alternatively, you could customize the actions of the Create / Go To Work Order link so that when it is clicked and a work order is created it automatically sets the associated opportunity to "Closed Won".

12. Click the **Job Summary Report** link to ensure that the campaign and opportunity fields properly flowed from the opportunity to the estimate to the work order.

Step 5: Turning the Work Order into an Invoice

Finally, we'll pretend that we have printed the work order, done the work, and now want to turn this work order into an invoice.

1. While still in the **Add / Edit Work Order** screen, change the Status to "Completed".

2. Click **Create Invoices…**.

3. In the *Create Invoices* screen, click **Create Invoices**…

4. When the message asks if you want to be taken to the Invoice List, click **OK**.

5. You should now see your invoice. Take note that the Opportunity No and Campaign have flowed throughout.

Step 6: Checking Campaign status

In this final step, we'll check the status of our "Knock on doors 2009" campaign and see how our efforts are going so far.

1. Click the **Sales Center** tab.

2. Click on the **Select** link beside the "Knock on doors 2009" campaign.

3. Click on the **Planning & Analysis** tab.

4. Click **Recalculate**.

5. You'll see the total converted leads is now 1, total opportunities won is now 1, and the total value of opportunities won is $1000.

6. Click on the **Estimates** tab and you'll see the true value for what was actually estimated.

7. Click on the **Invoices** tab and you'll see the true value for what has actually been invoiced.

In conclusion, QXpress Online allows you to involve more than just the operations side of the business. It allows your marketing, sales, field service work and accounting activities to all connect and flow into each other. And what's better is that every stop along the way is fully customizable, so that it will expand and adjust with you as your needs change.

Customer Portals

Overview

QXpress Online is a web-based product, so wouldn't it be great if your customers were able to log in and see a "My Account"? Great news, that's what **Customer Portals** are all about. As long as you have a customer's email address entered in QuickBooks they will be able to create their own portal account, sign into their customer portal and see their recent transactions, reprint invoices, update their own address and phone number information, and ask you questions.

Tip: The portals could even be customized, with a bit of effort, to show a locked calendar with their service schedule. In fact, you could even give them a calendar *which shows vacancies in your calendar, and allows them to tentatively schedule their own work orders.*

How do I view a sample portal?

1. In the *Customer* screen, if you don't already have a "test customer" with *your* email address, create a new customer. Make sure that the email address is entered, and that it is the only customer that has this email address.

2. Click on the **Customize** tab.

3. Click on the **Third Party Portal** link.

4. Click **Edit** beside the "CRM_Customer_Portal" in the *Edit an existing Third Party Portal* section.

5. Carefully go through the wizard as you view each step, and read about how the portals work.

6. In Step 6, click the **Show Test Page** link.

7. Follow the onscreen steps to register yourself as if you were the "test customer".

8. An email will be sent to your email inbox with your temporary password, which will allow you to sign into your portal account as your "test customer" and see your invoices, update account information, and ask questions. The questions and solutions you see are part of the **Call Center** tab, which gives you an advanced way of tracking and solving customer problems.

Note: Customizing a portal is one example that will often be outside of the "technical comfort" area of many QXpress Online users. This is where you may wish to seek paid customization services from your QXpress rep, helping you integrate it into your existing website, along with the look, feel and functionality you require.

It is also a great opportunity for 3rd party developers to create portals as shareable "apps" in the Method App Library.

Customization Suggestions

Overview

For some users in the field service industry, QXpress Online will solve their needs right from the starting block. If all you are looking for is a way to schedule one-time or recurring services on a calendar, print route lists and work orders, and turn the work orders into QuickBooks invoices…….well, that's already done for you – so little customization would be needed.

Other users, however, will see QXpress Online as a starting point, and it is for this type of user that we built a development platform rather than a rigid boxed product. The type of user that has unique and complex needs would have previously only had one option to be 100% satisfied, and that would have been to create an entire business system from scratch with a custom programmer. For this type of user, QXpress Online is nirvana as it brings them 90% of the way to a custom app, for free, instantly, without any headaches – and they only have to get that last 10% customized to their specific needs.

This part of the guide gives you pointers on where to do basic customization, as well as where we think some great opportunities are for customization, and how you would go about starting.

Assistance for Customization

Where do I go to customize?

Every page in QXpress Online where you view and edit data is called a *screen*. You can customize these screens by going to the **Customize** tab and clicking on the **Screens** tab link.

All the data you see is stored in *fields* within *tables*. You can create your own tables, and your own fields, as well as add new fields to existing tables by clicking on the **Customize** tab, and clicking on the **Tables / Fields** tab link. Note, that simply adding new fields does not add them to screens. Once you add new fields, you must edit the screen where you want them to appear and drag the fields onto your screen.

When customizing a screen, it is always best to make a copy of the existing screen, and then to modify the copy, leaving the original in-tact. That way, if you make a mistake, you can always go back to the original. To copy a screen:

1. Click the **Customize** tab.
2. Click the **Screens** tab link.
3. Scroll to the very bottom.
4. Click **Copy / Import Screen**.
5. Choose **This Account**, and click **Next**.
6. Choose the screen you want to copy, and click **Next**.
7. In Step 3, choose **Replace Links to an existing screen**. This way all tab links that previously referred to the existing screen will now refer to your copied version. This prevents you from manually going through your app and finding all the areas that pointed to the old screen and changing them to point to your new screen.
8. Click **Finish**.
9. Find your new screen in the screen list and click the **Edit** link beside its name.
10. Drag fields and objects from the left-hand side of the screen over to the right-hand side of the screen.
11. For each field or object you have dragged on the screen, click **Edit** and go through the wizard to set properties.
12. When you are finished modifying your screen click **Publish**, which will make your changes live.

Tip: the easiest way to learn how to create a screen is to open up existing screens and see how those screens were made. Everything is available to you to look at and "reverse-engineer".

What are the screen names relevant to QXpress Online?

- **FieldService_AddEditWorkOrder**: This is the "Add / Edit Work Order" screen that you see when you edit a work order or create a new work order. This screen is based on the "Activity" table.
- **FieldService_Calendar**: This is the "My Calendar" screen found in the *Field Service Center* tab. This screen is based on the "Activity" table.
- **FieldService_CopyWorkOrder**: This is the "Copy Selected…" screen you see when you copy services from the *Work Order* list.
- **FieldService_CreateInvoices**: This is the "Create Invoices" screen you see whenever you create an invoice. This screen is based on the "PreferencesMethod" table.
- **FieldService_CustomerEquipment**: This is the "Equipment" screen found under the *Field Service Center* tab. This screen is based on the "CustomerEquipment" table.
- **FieldService_Dashboard**: This is first screen you see under the "Dashboard" screen found under the *Field Service Center* tab.
- **FieldService_EditJobItem**: This is the "Enter Details & Costs" screen found when you edit job items from the "Add / Edit Work Order" screen. This screen is based on the "ActivityJobItems" table.
- **FieldService_Estimate**: This is the "Estimate" screen found under the *Field Service Center* Tab. This screen is based on the "Estimate" table.
- **FieldService_PostToQB**: This is the "Post to QB" screen found under the *Field Service Center* Tab. This screen is based on the "Account" table.
- **FieldService_PreferencesTimeTrack**: This is the "Default Time Tracking Settings" screen you see from the "Enter Details & Costs" screen. This screen is based on the "PreferencesMethod" table.
- **FieldService_TeamMembers**: This is the "Team Members" screen you see from the "Enter Details & Costs" screen. This screen is based on the "Users" table.
- **FieldService_WorkOrderList**: This is the "Work Order List" screen found in the *Field Service Center* tab. This screen is based on the "Activity" table.
- **FieldService_WorkOrderRecurring**: This is the screen you see when you click "Edit / View Recurring Dates" from the "Add / Edit Work Order" screen. This screen is based on the "Activity" table.

How do I find self-serve documentation?

- For documentation on QXpress Online specific questions, visit: www.qxpressonline.com

- The **QXpress Blog** can be found here: http://qxpress.com/cs/blogs/

- **Method Website** – for documentation related to the Method Platform, such as how to use the Method Report Designer, Method CRM, Objects, Design guides, etc., visit: http://www.methodintegration.com/web/self-service-documentation.aspx

- The **Method Design Quick Guide** can be found here: http://www.methodintegration.com/documentation/MethodDesignScreen-QuickGuide.pdf

- The **Method Blog** can be found here: http://methodintegration.com/cs/blogs/

How do I ask questions for free?

- The **QXpress Online forum** can be found here: http://qxpress.com/cs/forums/t/19.aspx
  Our staff will answer limited questions on the forum, as will other QXpress Online users, and 3rd party consultants. Expect pointers and tips. Don't expect someone to walk you through each and every click.

- The **QXpress Users Conference**, while not free, has an entire stream dedicated to QXpress Online, mostly helping with customization. This will be an invaluable experience. To learn more and sign up visit: http://www.qxpress.com/usersconference

How is "technical support" defined, and what does it cost?

Technical support is free. Yes, free. BUT – technical support for QXpress Online is limited entirely to solving bugs and errors. This is not your typical tech support department that also answers "how do I?" questions.

"How do I" questions are asked in booked training and consulting times with your QXpress rep.

Can I pay someone to customize instead of doing it myself?

Yes, our staff, or a 3rd party consultant will be happy to help out. Contact your QXpress rep, tell them what you want to add or change, and they'll put together a quote for what it will cost you to have done.

Suggestions

Suggestion 1: Rules

QXpress Online, out of the gate, is very flexible. While this flexibility overall is a good thing, it can lead to you easily breaking your own business rules if you aren't careful.

For example, some companies need to invoice jobs *before* they do them. While for other companies, invoicing a job *must only* be done once it is completed. These types of companies may want to customize the process in the *FieldService_CreateInvoices* screen so that it only includes work orders that have an ActivityStatus of "Completed".

Suggestion 2: More Calendars

A Calendar is like any other object, like a grid or a text box. You can pretty much show anything on a calendar that has a start date, end date, and a "resource" to assign it to.

For example, instead of creating a calendar which lists work orders for the resource of "users", you could just as easily add a dropdown in the Activities table, linking to the QuickBooks table "Vehicle", and use the vehicle as your resource. That way you could not only make sure you don't overbook your users with one calendar, but you could have a second calendar, but showing the same work orders, to make sure you don't overbook your vehicles.

Suggestion 3: Add lots of custom fields

You can add as many fields as you like, and the data types can be Text, Dropdowns, Money, Integer (whole numbers), Decimal, YesNo, Picture (and other attachments) and DateTime. You can even create your own tables and link them to existing tables.

If you want to add additional fields at the customer level, edit the Customer table, and then edit the Customer List screen.

If you want to add additional fields at the work order level, edit the Activity table, and then edit the FieldService_AddEditWorkOrder screen.

If you want to add additional fields at the job item level, edit the ActivityJobItems table, and then edit the FieldService_EditJobItem screen.

Note: the only downfall of adding lots of custom fields is that they will slow down your screen's initial load time. Smaller web pages load faster the bigger ones. However, because of the way the Method platform is designed, once pages are loaded they are fast for the rest of the day until you close your browser.

Suggestion 4: Customize Templates

You will have to customize your templates, since at the very least you will have to replace the logo with your own.

Tip: You can also install the report designer directly by going to:
http://www.methodintegration.com/MethodReportDesigner/setup.exe
If you already have it installed, you can go to:
http://www.methodintegration.com/methodreportdesigner/methodreportdesigner.application

Suggestion 5: Scheduling by sort order instead of by time

By default, QXpress Online schedules by time of day. While this is desired by most field service companies, some companies schedule by day and sort order, and don't really care about time of day. This is especially true for service companies that work on the exterior of a property (lawn care, pool maintenance, power sweeping, etc.) and don't require the customer to be present.

The Activity table, which work orders are based on, comes with an existing SortOrder field for this exact purpose. So if you don't schedule by time, but rather by order, we suggest:

1. Adding *SortOrder* field to the *FieldService_AddEditWorkOrder* screen.

2. Change the DueDateStart field and DueDateEnd fields on the *FieldService_AddEditWorkOrder* screen to show a date format, instead of Date and Time format.

3. Add the *SortOrder* field to the *Activity* grid in the *FieldService_WorkOrderList* screen.

4. Remove the DueDateStart and DueDateEnd fields from the *Activity* grid in the *FieldService_WorkOrderList* screen, and then add them back again, this time in Date format instead of DateTime format.

5. Change the sorting on the *Activity* grid, on the *FieldService_WorkOrderList* screen to sort by SortOrder.

6. Modify the FieldService_RouteList template so that it sorts by SortOrder instead of DueDateStart.

7. Modify the route list so that it shows the SortOrder field and not the time.

Suggestion 6: Build a Customer Portal

The screens that make up the default customer portal are:

- CRMCustomerPortal_Home
- CRMCustomerPortal_MyProfile
- CRMCustomerPortal_Question
- CRMCustomerPortal_Transactions

Portals can be made for whatever screen you like. Use your imagination. All your QuickBooks data, CRM data, and scheduled work orders are live and ready to be made useful to your customer base – now it's up to you what you want to do with it.

Suggestion 7: Listen to your staffs' "wouldn't it be nice if…" requests

In every software product you use, you must have at some point said to yourself "wouldn't it be nice if…" regarding the features of that product.

For example, you might say to yourself, "wouldn't it be nice if I had a 'Complete and Save' button that relieved me from having to manually choose the Completed status and then manually click Save….since Complete and Save could do it all?".

Or you might say "Wouldn't it be nice if whenever I clicked 'Complete and Save' and the Job Name was 'Service Call' that it automatically inserted a follow up Activity for our customer service staff to follow up and ensure the customer was happy with our service?".

We are all so used to just letting our "wouldn't it be nice if…" dreams die minutes later, since all the software products we use can't be easily modified, or can't be modified at all. It's not as if you can open up QuickBooks, open the Invoice screen, and change what happens when you click "Save & Close", or add a new button that automatically performs additional transactions when the invoice saves.

But now, with QXpress Online, your "wouldn't it be nice if…" dreams can become a reality, and you should be encouraging your staff to let you know what would make their jobs easier, faster, and more effective, so that your company can become the pinnacle of efficiency.