



Method Scheduling & Invoicing

For QuickBooks Online

Quick Start Guide 1.0

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Method Scheduling & Invoicing Overview

Method Scheduling & Invoicing is an app built on the Method Integration platform for the field-services industry. 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. It is used primarily by field service companies, including Lawn Care, Landscaping, Pest Control, Irrigation, HVAC, Plumbing, Electrical, Pool Maintenance and Cleaning – however, it can be used and customized by anyone who schedules services to be performed by their staff or subcontractors.

What is Method?

The Method Integration platform uses its bi-direction syncing engine to sync lists and transactions in both QuickBooks and QuickBooks Online to our web server. This enables Method to sport a live web-based version of your QuickBooks data, along with full CRM capabilities. You can then install other “apps” (like Method Scheduling & Invoicing) to add additional functionality. What makes Method unique, however, is that 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 boxed software are over. Method Scheduling & Invoicing brings in a new era of *company-specific* freedom.

How do I get Method Scheduling & Invoicing?

If you are not already a user on the Method Integration platform, [click here to sign up for Method CRM Pro for QuickBooks Online](#).

Once you are a Method CRM user, simply sign into Method, click on the **Customize** tab, click on the **My Account** tab link, and add the Method Scheduling & Invoicing app to your account.

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

Method Scheduling & Invoicing 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, Method Scheduling & Invoicing sets out to solve the core 90% of your needs and leaves it up to you to customize the last 10% - and you can do this *now*, to your *own* specifications, without having to wait.

Important Recommendations

Use Google Chrome or FireFox. Microsoft Internet Explorer is slower than other browsers. The speed difference is remarkable – you'll be surprised.

Community. Method is heavily community-based, so make use of it. You may 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. Visit the Method community at: <http://www.methodintegration.com/cs/>

Customization Services. The fact that each Method Scheduling & Invoicing 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**. In addition, there are over 150 certified Method Solution Providers that are also available – maybe there is one just down the road from your office: <http://www.methodintegration.com/Consultants.aspx>

“A to B” tutorial

Before getting into the nuts and bolts of how to setup Method Scheduling & Invoicing, there is no better way to get familiar than to do a quick A to B tutorial.

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

Step 1: Scheduling your first Work Order

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

1. Click the **Scheduling & Invoicing** 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 *Tasks and Materials* 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.

Step 2: 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 3: Create an Invoice and post to QuickBooks Online

In this step we'll turn the work order into a QuickBooks Online 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 Online 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 **Invoice** tab link, and be viewing the invoice you just created.
6. Now, sign into **QuickBooks Online** 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 4: Stop and Smell the Roses

If you didn't realize the significance of what happened, *stop and smell the roses!* With virtually zero setup, you were able to put an existing QuickBooks Online customer into a calendar, print a work order, and turn that work order into an invoice in QuickBooks Online. There was no double-entry, no mistakes, no wasted time by your bookkeeper typing out the same information that was already typed out by your scheduling manger. 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.

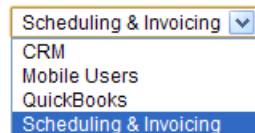
Scheduling & Invoicing tab

The Scheduling & Invoicing tab serves as a one-stop location for scheduling, job costing and turning work orders into invoices.

Permissions: Setting up Tab Groups, Roles & Users

Assigning Tab Groups

Since Method Scheduling & Invoicing gives you not just scheduling operations but also your QuickBooks data and CRM activities, you should be very careful to consider *who* needs to access *what*. In the top-right corner of your screen you will see the following tab groups by default:



When users choose a tab group, they will see all the tabs that belong to that tab group. For example, most of the users of Method Scheduling & Invoicing at your company will only need access to customers, work orders and sales activities. Therefore, when they sign in, you may choose to only give them access to the Scheduling & Invoicing tab group and remove access to the other tab groups. This will give them access to the *Scheduling & Invoicing* tab, and optionally the QuickBooks and Synchronize tab (read how to limit access further by assigning Roles).

To assign users to Tab Groups:

1. Go to **Customize > Tab Groups**.
2. Click **Edit...** beside one of the tab groups.
3. In Step 1 of the *Edit Settings* wizard, place a checkbox beside only the users that should have access to this tab group.
4. Click **Finish**.
5. Repeat for each tab group.

OR

1. Go to **Customize > Users**.
2. Click **Edit...** beside one of the users.
3. Advance to Step 4 "Access to Tab Groups".
4. Place a checkbox beside only the tab groups this user should have access to.
5. Click **Finish**.

6. Repeat for each user.

Setting up Roles

In addition to restricting which tab groups a user has access to, you can also restrict which tabs that user can see within a tab group. This is especially useful, for example, if you have given a user access to the Scheduling & Invoicing tab group, but you don't want them to have access to the *QuickBooks* or *Customize* tab.

To specify which roles are assigned to a tab:

1. Go to **Customize > Tabs**.
2. Click the *Edit* icon to the left of the tab.
3. Place a check beside only the roles that can view that tab.
4. Click **Finished Editing Tab**.

To specify which roles are assigned to a user:

1. Go to **Customize > Users**.
2. Click **Edit...** beside one of the users.
3. Advance to Step 5 "Access to Roles".
4. Place a checkbox beside only the roles this user has been granted.
5. Click **Finish**.

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 Method Scheduling & Invoicing 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 the price your monthly subscription, you may choose to setup users in such a way that they can still be assigned work, but cannot sign in, and therefore do not increase your monthly subscription.

Creating a new User

1. Go to **Customize > Users**.
2. Enter a new **User Name**.
3. Click **Continue**.
4. 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.

5. In step 10, specify whether this user should be able to sign into Method. If they can sign in, it will increase your monthly subscription.
6. Click either **Add User & email invitation** or **Add User**.
7. The *Edit Settings* screen will appear.
8. For *Link to Employee / Vendor / OtherName (optional)*, choose a QuickBooks employee or vendor to link this user to. This will be used for posting start and stop times to QuickBooks.
9. Go through each step of the wizard and carefully set privileges for this user.

Editing settings for an existing User

1. Go to **Customize > Users**.
2. In the **Edit an existing User** section, click **Edit** beside the user.
3. For *Link to Employee / Vendor / OtherName (optional)*, choose a QuickBooks employee or vendor to link this user to. This will be used for posting start and stop times to QuickBooks.
4. 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 Scheduling & Invoicing tab. 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.

Adding a Work Order to My Calendar

Using the New Work Order button

1. Click the **Scheduling & Invoicing** 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 **Scheduling & Invoicing** 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 **Scheduling & Invoicing** 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 change color 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 **Scheduling & Invoicing** 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 Method'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 **Scheduling & Invoicing** 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 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, but it is not necessary to do so.

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 Method Scheduling & Invoicing 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 Method Scheduling & Invoicing, 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.
- 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 Method Scheduling & Invoicing: "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, Method Scheduling & Invoicing 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.*

Tasks & Materials Section

The *Tasks & Materials* 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 Method Scheduling & Invoicing 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 **Scheduling & Invoicing** 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.

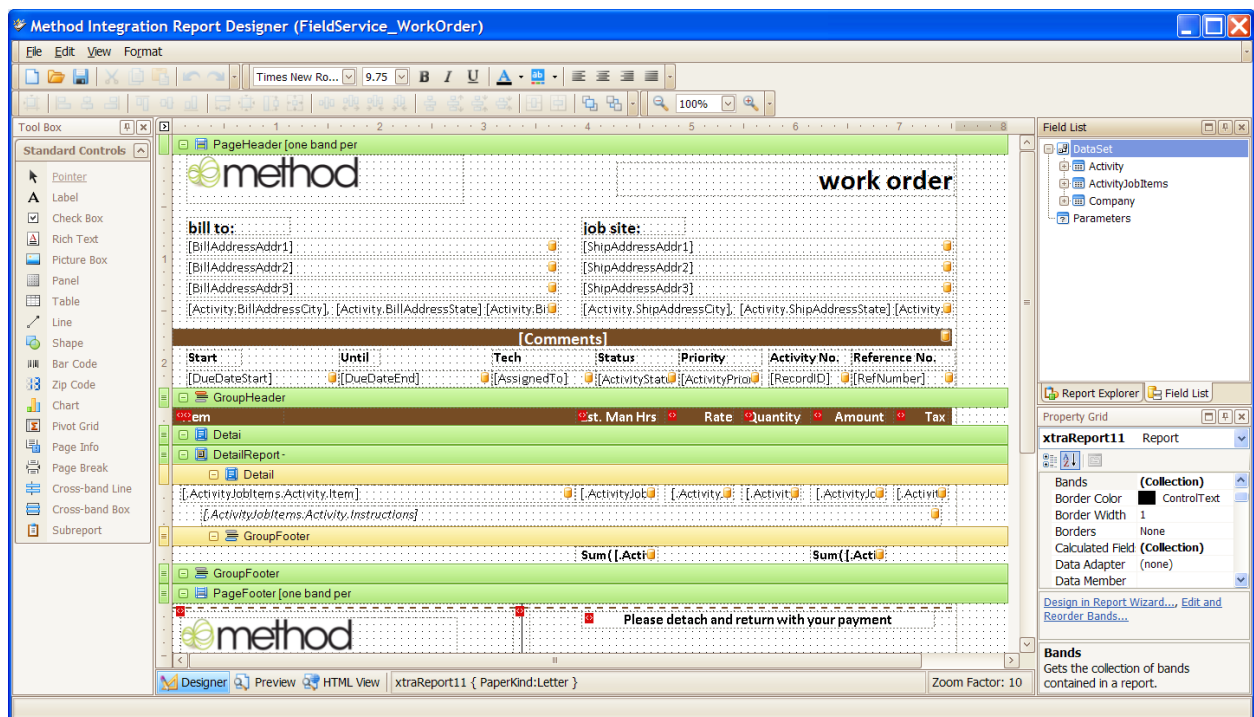
How do I print or email Work Orders or Route Lists from the Work Order List?

1. Click the **Scheduling & Invoicing** 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 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 **Scheduling & Invoicing** 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 Chrome or 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 **Scheduling & Invoicing > Dashboard**.
2. Click **Customize Templates....**
3. Choose the new template for the appropriate category, and click **Save & Close**.

Tip: You can 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>

Setting up Team Members

When completing work and entering start and stop times for all members on a crew, you must list the default team members.

1. Go to **Scheduling & Invoicing > Dashboard**.
2. Click **Team Members....**
3. Create a new team by entering a *Team Name*.
4. Choose a *Team Leader*.
5. For "Employee / Vendor 1", choose the Team Leader's QuickBooks employee name.
6. If you have more than one person on each team, for "Employee / Vendor 2" through "Employee / Vendor 5" choose the other QuickBooks employees on this crew.
7. Click **Save & New**.
8. Repeat for all your teams.

Time Tracking

When completing work and entering start and stop times for all members on a crew, you must list the default team members.

1. Go to **Scheduling & Invoicing > Dashboard**.

2. Click **Settings & Preferences....**
3. Choose a default preference for *Billable Status*, based on whether you typically charge customers a rate based on how many hours were worked. For field service companies, the vast majority of the time, this is set to "NotBillable".
4. Click **Save & Close**.

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 can staff record completed work on a mobile device?

If your crew leaders have a mobile phone or tablet, there is a specialized mobile login and mobile work order screen for staff to complete work orders in the field. The crew leaders must have work assigned to their Method user name, and they must have login access to Method.

1. On their mobile browser, go to: <http://miurl.cc/m>
2. Enter the Method company account, crew leader's user name and password.
3. Click **Login**.
4. Choose the *Work Orders* link from the dropdown at the top of the screen.
5. Click on the job the crew is going to start working on.
6. Click **Start Timer** to start the clock on this job. You will return to the work order list, and the job will now change to have a status of *In Progress*.
7. When the job is finished, click on the job in the work order list.
8. Click **Stop Timer**. This will put a stop time in for all crew members, and set the status of the job to *Completed*.

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 **Scheduling & Invoicing** 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 **Scheduling & Invoicing** 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 **Scheduling & Invoicing** 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 **Scheduling & Invoicing** 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"?

If you are using the mobile work order screen, your staff will have already completed jobs in the field. Otherwise, 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 **Scheduling & Invoicing** 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 **Scheduling & Invoicing** 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 *Tasks & Materials* 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

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 **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 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 *Tasks & Materials* 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 addition to the *Job Summary Report*, two other job costing reports come built into Method Scheduling & Invoicing, *Est. Vs. Act. Man Hrs By Customer* and *Job Cost Profitability by Customer*. To access these reports:

1. Click the **Scheduling & Invoicing** 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 Method Scheduling & Invoicing, 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 **Scheduling & Invoicing** 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 **Scheduling & Invoicing** 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 **Scheduling & Invoicing** 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.

CRM

Overview

Since Method Scheduling & Invoicing 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 Method Scheduling & Invoicing it should be thought of as a way get more customers and keep the ones you have.

Note: this guide only touches on CRM. To get a full guide on Method CRM, visit: <http://www.methodintegration.com/web/self-service-documentation.aspx>

Why use Method 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 Method Scheduling & Invoicing 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 Method Scheduling & Invoicing, 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.

To view the CRM features of Method, choose the CRM tab group in the top right corner of your screen.

Campaigns

Campaigns are marketing initiatives you setup and track. This could be a paid advertising campaign, such as "Door Hangers March 2012" or an in-house sales

campaign such as “Revisit lost 2011 opportunities”, or even an ongoing lead type campaign such as “Word of mouth”.

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).

Leads

Leads are simply customers that have not yet been sent to QuickBooks. You can therefore have thousands of potential customers as “leads” in Method Scheduling & Invoicing 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 Method Scheduling & Invoicing. 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.

Activities

Activities are every conversation, event, task, and follow up reminder you have with your customers. In fact, the work orders used in Method Scheduling & Invoicing 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.

Portals

Overview

Method Scheduling & Invoicing 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.

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 **Portals** link.
4. Click **Edit** beside the "Contacts Portal" in the *Edit an existing Portal* section.
5. Carefully go through the wizard as you view each step, and read about how the portals work.
6. In Step 7, 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 **Cases** tab, under the **CRM** tab group, 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 Method Scheduling & Invoicing users. This is where you may wish to seek paid customization services from your Method rep, helping you integrate it into your existing website, along with the look, feel and functionality you require.

Customization Suggestions

Overview

For some users in the field service industry, Method Scheduling & Invoicing 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 Method Scheduling & Invoicing 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, Method Scheduling & Invoicing 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 Method Scheduling & Invoicing 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 Method Scheduling & Invoicing?

- **SchedInv_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.
- **SchedInv_Calendar:** This is the "My Calendar" screen found in the *Scheduling & Invoicing* tab. This screen is based on the "Activity" table.
- **SchedInv_CopyWorkOrder:** This is the "Copy Selected..." screen you see when you copy services from the *Work Order* list.
- **SchedInv_CreateInvoices:** This is the "Create Invoices" screen you see whenever you create an invoice. This screen is based on the "PreferencesMethod" table.
- **SchedInv_CustomerEquipment:** This is the "Equipment" screen found under the *Scheduling & Invoicing* tab. This screen is based on the "CustomerEquipment" table.
- **SchedInv_Dashboard:** This is first screen you see under the "Dashboard" screen found under the *Scheduling & Invoicing* tab.
- **SchedInv_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.
- **SchedInv_Estimate:** This is the "Estimate" screen found under the *Scheduling & Invoicing* Tab. This screen is based on the "Estimate" table.
- **SchedInv_PostToQB:** This is the "Post to QB" screen found under the *Scheduling & Invoicing* Tab. This screen is based on the "Account" table.
- **SchedInv_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.
- **SchedInv_TeamMembers:** This is the "Team Members" screen you see from the "Enter Details & Costs" screen. This screen is based on the "Users" table.
- **SchedInv_WorkOrderList:** This is the "Work Order List" screen found in the *Scheduling & Invoicing* tab. This screen is based on the "Activity" table.

How do I find self-serve documentation?

- The **Method** can be found here:
<http://www.methodintegration.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 Forums** can be found here:
<http://methodintegration.com/cs/forums/>

How do I ask questions for free?

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

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

Technical support is free. Yes, free. BUT – technical support for Method 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 Method 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 Method 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.