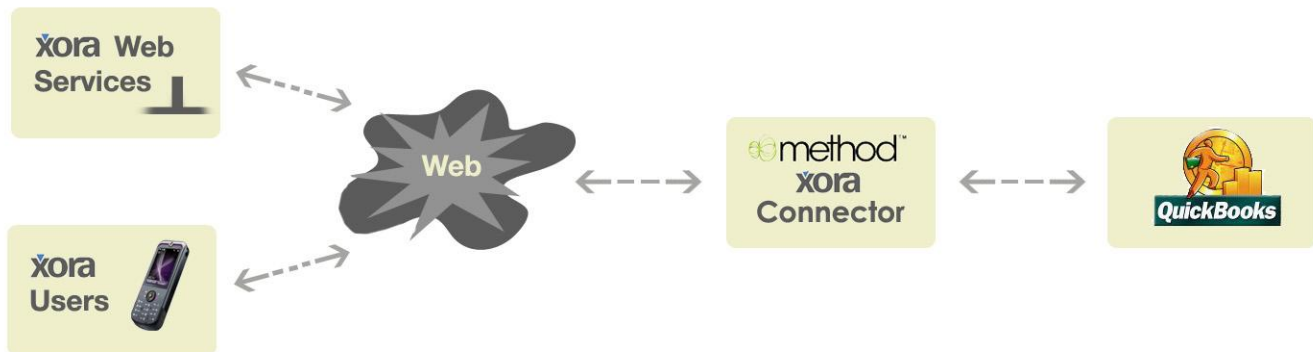


## Summary

The **Method Xora Connector** is a bridge that connects QuickBooks with Xora for the purpose of sending start & stop times from Xora to the QuickBooks Timesheet. With this Xora Connector bridge, Xora Jobs and Users are paired with QuickBooks Customer:Jobs and Employees / Subcontractors. All job and shift times entered into Xora are then pulled into the Xora Connector, which in turn posts them to QuickBooks for payroll and/or billable time.



## Pricing

The Method Xora Connector subscription is \$20/mo with an initial \$75 setup fee that includes a 30 to 45 minute installation and training session. *Technical support* is free and covers technical issues such as error messages, installation problems, sign-in issues or any other malfunctions. *Other services*, such as additional training, customization and general 'how do I?' questions are available through a Method Consultant, for an additional fee.

## Core Features

- Bring Xora Shift Times into Method; Bring Xora Job Times into Method.
- Manage Times to be set as Billable or Nonbillable. The "Billable" status indicates whether or not the time is available to pull onto into a QuickBooks invoice.
- Choose whether or not to track Lunch time and/or Travel Time.
- Setup default preferences to link QuickBooks classes, payroll items and service items.
- Send Times to QuickBooks Weekly Timesheet with the click of a button.

## Additional Features

- Overtime adjustments: adjust Times in Method for Overtime for Days, Weeks, Months or any custom view as a separate time and payroll item.
- Send jobs from Method to Xora for one or multiple Employees.
- Map Xora Jobs to QuickBooks Customer: Jobs, in order to save time on data entry.
- Bring in FlexField data to flag Times for adjustment, or to send directly to the QuickBooks Timesheet.
- Use FlexField Data to map specific QuickBooks Service Items to Job/Shift Times.



# Method Xora Connector Summary

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## Not Included

- Reporting, Invoice generation, Material tracking.
- Integration with any QuickBooks transactions other than Time Tracking / TimeSheet.
- Features found in the Method Full Blown edition.

## Optional Upgrade to Method Full Blown edition

Upgrading to the Method Full Blown edition will give you the capabilities to add your own features, or have a Method Consultant create them for you.

### Method Full Blown Edition

- Includes the Method Xora Connector.
- Your desktop QuickBooks on the web! A full Customer Center, Vendor Center, Employee Center to view, edit and create QuickBooks transactions with real time integration with QuickBooks.
- CRM - Create marketing campaigns, track sales opportunities, track call center cases, track customer phone calls, emails and follow up reminders, send mass emails, integrate with Microsoft Outlook and more.
- All screens are fully customizable. Modify and create your own screens, tables, fields and customer portals.
- Install industry-specific apps from the Method Application Library.
- Work with a Method Consultant to build a custom procedure for sending more Xora information into QuickBooks, such as creating invoices or vendor expenses.
- Subscribing for this upgrade on top of the Method Xora Connector, will total \$65 US per month.

## Contact

To upgrade Method, call 1-888-9-ALOCET. To sign-up for the Method Xora Connector: <https://www.methodintegration.com/web/signupapp.aspx?app=Xora%20Connector>

## FAQ

- 1. What do I need in order to use Xora and the Method Xora connector with QuickBooks?**  
You will need any version of QuickBooks Pro/Premiere/Enterprise, an internet connection and a Windows O/S with the newest .Net updates. A Xora product that includes integration.
- 2. Where can I get a copy of the Method-Xora Connector Documentation?**  
The Connector documentation can be found here: [http://www.methodintegration.com/documentation/MethodXoraConnectorv1\\_UserGuide.pdf](http://www.methodintegration.com/documentation/MethodXoraConnectorv1_UserGuide.pdf)
- 3. How should Xora be setup in order to optimize integration with Method?**  
If you are tracking travel time between jobs, we recommend you use a Job Status of Travel Start. There should also be a Lunch Stop and Start Event for tracking Lunch.



# Method Xora Connector Summary

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4. **Does the Connector work with the Xora Supervisor module?** Yes.
  5. **Does the Connector work with Custom Statuses?** Yes.
  6. **Will I be able to create invoices from Xora times?**  
Invoices will need to be created manually. Any automation will require an upgrade.
  7. **Will I be able to track materials? Job Cost?**  
Materials tracked by Xora FlexFields can be brought into Method; however no QuickBooks material tracking will occur. Job costing is currently done on a Timesheet- Associated Customer basis.

## Customization and Pricing

The main advantage of Method over other solutions is that it can be customized from head-to-toe. This customization can be done by you, by a Method Consultant or by a Solutions Provider. To have a Method Consultant produce customization services that work exactly the way you want with QuickBooks, you will first need to upgrade from the Xora Connector to Method Full Blown Edition which includes the features described previously. A Method Consultant will then build a preliminary specification of the customization job. Upon approval and payment, the consultant will then develop and test an initial draft for you to review. Revisions are made until you are satisfied with the outcome, however any revisions beyond the initial specifications may be subject to additional fees. The Method Consultant will also provide you with documentation, which explains the changes that were made and how to use them.

### Basic Screen Customization:3 \$595

- When making basic changes on up to 3, typically existing, screens.
- Includes up to 10 fields. *Each additional field \$11*
- Includes up to 10 basic objects. *Each additional object \$11*
- Includes up to 1 grid or calendar object. *Each additional grid or calendar \$55*
- Includes up to 40 actions. *Each additional action \$15*

Example: John is a current Method Xora Connector user. He would however like to streamline the process of creating Invoices in QuickBooks by auto creating the invoices and adding the payment information that was collected in the field. A consultant will work with John to create an invoice in Method/QuickBooks based on what was entered into the Xora FlexFields, when times are requested from Xora into Method. Depending on the payment type, John would like a payment transaction on the customer's account to be created and the invoice to be marked as paid. In order to create what John is looking for, he will need to upgrade to Method Full Blown Edition and have a consultant perform a Basic Screen Customization:3.

### Basic Screen Customization:10 \$1595

- When making basic changes on up to 10, typically existing, screens.
- Includes up to 35 fields. *Each additional field \$11*
- Includes up to 35 basic objects. *Each additional object \$11*
- Includes up to 3 grid or calendar objects. *Each additional grid or calendar \$55*
- Includes up to 125 actions. *Each additional action \$15*



# Method Xora Connector Summary

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Example: Doris is a potential Method Xora Connector user. She is interested in QuickBooks integration with Xora. Doris uses Sales Orders in QuickBooks for tracking jobs, and turns them into invoices upon completion. She would like a process in Method where she can create a Sales Order, and send it to Xora as a Xora job without any double entry. She would then require a process where FlexField information can be extracted to check if the job is completed, when Xora times are brought into Method. Doris would also require a customized screen where she can turn the Sales Order into an Invoice and email it to a customer. In order to create what Doris is looking for, she will need to sign up for the Method Full Blown Edition, and the Xora Connector app. A Method Consultant will then design the screens and processes for her using Basic Screen Customization:10.

## QuickBooks Tables and Transactions

QuickBooks stores all of its information (Transactions, Lists) in tables. Method has access to all of these tables in real time.

The **Method Xora Connector** currently works with the following:

- Time Tracking
- Customers List
- Employee List
- Vendor List

With Full Method Integration, the following becomes available:

- Accounts
- AR Refund Credit Card
- Bill & Bill Payment
- Check & Charge
- Credit Card Charge
- Credit Card Credit
- Credit Memo
- Deposit
- Estimate
- Inventory Adjustment
- Invoice
- Item Receipt
- Journal Entry
- Purchase Order
- Receive Payment
- Sales Order
- Sales Receipt
- Vehicle Mileage
- Vendor Credit
- Item List
- Class List
- Payroll Items