



Method Xora Connector

User Guide

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Method Xora Connector Documentation

Prerequisites

1. As the Method-Xora connector allows users to export service times directly into QuickBooks, it is important to have active employees setup in the QuickBooks Employee Center. Payroll Items will need to be setup as well. Click **Edit > Preferences > Payroll**, then select the Company Preferences tab and make sure Payroll is turned on. To create a Payroll Item, edit an employee in QuickBooks and select the Payroll tab or dropdown. Then click in the Item Name column under Earnings and the dropdown < Add New > will appear.
2. *Internet Explorer Users:* Ensure that the security permissions in IE are adjusted for the Connector to execute. Click **Tools > Internet Options**. Select the *Security* tab and click the **Custom Level** button. Scroll down to the *Downloads* subheading, and make sure that *Automatic prompting for file downloads* is set to *Enable*.
3. *Firefox Users:* Ensure that Mozilla Firefox is installed. This can be downloaded from: <http://www.mozilla.com/firefox>. Click the Free Download link and follow the setup instructions. Next, download and install the Firefox add-on FFClickOnce 0.8. This can be located here: <https://addons.mozilla.org/en-US/firefox/addon/1608>. Click the Download Now link, and follow the instructions to save and run the add-on.
4. You will also need to download the .NET 3.5 Framework. This is a manual update and can be located here: <http://www.microsoft.com/downloads/details.aspx?FamilyId=333325FD-AE52-4E35-B531-508D977D32A6&displaylang=en>. Make sure you are up to date with all automatic updates first, including optional updates such as the .NET framework 1.1 and 2. See the Appendix if you are unsure of how to update your framework.

Registering

1. To register a new Method-Xora account, bring up the website here: https://www.methodintegration.com/web/SignUpApp.aspx?app=Xora_Connector.
2. Fill out the required fields and click **Login**.
3. An e-mail will immediately be sent to the registered e-mail account. Make sure to refresh the inbox, as well as check any Trash or Junk Mail folders to ensure it has arrived.
4. You will now be able to login to the new Method Account here: <https://www.methodintegration.com/method/Login.aspx>.

Initial Setup

1. After logging into your Method Account. It is important to setup a relationship with QuickBooks.
2. Click on the **QuickBooks** tab at the top, and follow the instructions under the section *Connect QuickBooks to your Method Account*.
3. Once Method has been synchronized with QuickBooks, you should see all of your QuickBooks Customers, Items and Employees in Method.

Method Xora Connector Preferences

1. The Method Xora Connector Preferences are essential to importing times into Method and then into QuickBooks. To setup these preferences, click on the **Xora Connector > Xora Setup** tab.
2. Click on **Launch Preferences** under the Method Xora Connector Preferences section.
3. First, you must fill out your Account Information for both Xora and Method. Enter your Xora Account ID, Xora User ID and Xora Password. This is the same Admin login information you would use when logging into your Xora account here: <https://apps.xora.com/xoraapps/jsp/AppLogin.jsp>.
4. Enter your Method Account number, Method UserID and Method Password. This can be found in your *Welcome To Method* email that was sent upon registration.
5. Next choose your **Default Items**. A default Shift or Job item is used when no mapping data is found when pulling times from Xora into Method. For example: You have mapped the customer Bob Crenshaw to Job Number 145, and to a QuickBooks Class 'pro' using the Job/Customer Mapping screen. However, you have not mapped customer John Smith. When Method imports times from Xora, the default Shift or Job Class will be assigned to the service time for John Smith whereas the service time for Bob Crenshaw will use the Class 'pro'.
6. If no matching Job number is found in the Job/Customer Mapping screen, a default Shift Time or default Job Time Class, Service and Payroll Item will be assigned. If there are no items available in the dropdown list, they will need to be created in QuickBooks. If you do not want a default item assigned, simply leave it blank.
7. The Default Billable status will flag a job time as billable or not in QuickBooks. I.e. The job time will be able to append an invoice with its amount.
8. **Overtime** calculation preferences are set here, but done in the Step2 Send to QuickBooks screen. Set the Max Hours per Day (Before Overtime) in order to determine how many hours in a day should be considered regular hours before going into overtime.
9. Set the Max Hours per View (Before Overtime) in order to determine how many hours in your *Send to QuickBooks* screen view should be considered regular hours before going into overtime. As you are not limited to choosing a specific view (i.e. week, month, user), make sure you always have the proper number entered here before attempting to Allocate Overtime by View.
10. The Default Overtime Payroll Item is used when allocating Overtime in the Send to QuickBooks screen.
11. **Time Preferences** are used to indicate which times are to be used from Xora and how.
12. The Time Zone preference is used for sending jobs to Xora, through the Job/Customer Mapping screen. Make sure the proper Time Zone is set before attempting to send jobs to Xora.
13. Use Shift Times enabled by itself, will exclude job times found in Xora. For example: If a user logs into Xora on their mobile phone and begins a Shift, performs and logs 3 jobs, then ends the shift. Only the Shift Start and Stop time will be brought over for a one time entry.
14. Use Job Times enabled by itself, will exclude Shift Times found in Xora. For example: If a user logs into Xora on their mobile phone and begins a Shift, performs and logs 3 jobs, then ends the shift. Only the Job Start and Stop times for the 3 jobs will be brought over for 3 time entries.
15. Use Custom Job Times is available for Xora Gold/Premier/Wireless Workforce Manager users. You will be able to bring in Custom Job Statuses and their timestamps from Xora into Method. This by itself will also exclude Shift Times found

- in Xora. For example: If a user logs into Xora on their mobile phone and begins a Shift, performs and logs 3 jobs, then ends the shift. Only the custom job statuses of the 3 jobs will be brought over for job time entries.
16. Enabling or disabling both options, will result in bringing over both Shift and Job Times as separate time entries. An adjustment will appear next to the shift to compensate for the total job time spent. For example: If a user logs into Xora on their mobile phone and begins a Shift, performs and logs 2 jobs, then ends the shift. The Shift Start Time and Stop time will come for one time entry, and the Job Start and Stop Times for the 2 jobs will be brought over, creating another 2 entries.
 17. Note that you can only use Custom Job Times or Job Times. Not both.
 18. Lunch and Travel Times settings are used to indicate if you would like to adjust your times (placed in the adjustment column of the Send to QuickBooks screen)
 19. Enabling *Add Travel Time to Job Time* will apply the travel to the Shift or Job Time. Disabling it will cause an adjustment to appear.
 20. Enabling *Add Lunch Time to Shift Time* will apply the lunch to the Shift or Job Time. Disabling it will cause an adjustment to appear.
 21. Travel Time as Separate Entry, will place travel time associated with a Shift or Job as a separate time entry.
 22. The Default Travel Service Item is the default Service Item applied for the previous option, when a new time entry of type travel is added.

FlexField Mapping

Xora allows the tracking of custom data entry through fields called FlexFields. They can be applied to Shifts, Jobs or both in Xora. Xora users who wish to track information regarding the start or stoppage of shifts/jobs track this information. This information can be brought into Method to help flag certain Shift or Job times.

1. To open FlexField Mapping, click on the **Xora Connector > Xora Setup** tab.
2. Next click the **Launch Mapping** button, under the FlexField Mapping section.
3. This screen will allow you to map up to 10 custom fields, as well as a Notes field. It is important to type in the exact name of the Shift FlexField or Job FlexField.
4. When a matching FlexField is found during a Get Xora Time action, the resulting value of that FlexField is placed in the appropriate Method field. This is useful for flagging times as needing attention. The Mapped Notes field (to whichever FlexField of your choice) is the only field that will actually be sent to QuickBooks, the Custom fields will remain in Method.
5. If you would like to map the Xora *Comment* field to Method, simply type in the word **Comment** in any Custom1-10 field, or the Notes field. Please note that this name is reserved and should not be used as a FlexField name in Xora.
6. If you are using Custom Job Statuses in Xora, you can map the Job Status Name to a Custom1-10 field or the Notes field. Simply type in the name **JobStatusName** (no spaces). Please note that this name is also reserved and should not be used as a FlexField name in Xora.

FlexField Value Mapping

FlexField Value mapping gives you the opportunity to assign different QuickBooks items to Service Times, such as ServiceItem, BillableStatus, PayrollItem and Class. This is useful if you have codes setup for your Xora Users to enter into their FlexFields, depending on which

work was performed. For instance, if your Xora User performed a Grass Cut for a customer, they would enter the code GRASS into their FlexField for the current job they are performing. When the Method Xora Connector brings in the completed job, it will look at the FlexField Value Mapping table, and assign a QuickBooks Service Item "Lawn Mowing" to the service time.

1. To open the FlexField Value Mapping screen, click on the **Xora Connector > Xora Setup** tab.
2. Next, click **Launch Mapping** button, under the FlexField Value Mapping section.
3. To enter in a new mapping, enter a Name and Value and click **Save**. The name should be identical to the FlexField being used in Xora.
4. To edit an existing mapping, click **Select**, make your changes and click **Save**.
5. To delete an existing mapping, click **Select** and then click **Delete**.
6. To clear the screen for a new entry, click **Clear**.

Xora Custom Job Statuses

The Xora Custom Job Statuses window allows you to specify which Xora Job Statuses are used for Time Tracking. This screen is used directly with Custom Job Statuses and will require that you are a Xora Gold/Premier/Wireless Workforce Manager user, and that you have Use Custom Job Times enabled under **Xora Connector > Xora Setup > Launch Preferences**.

1. To open the Xora Custom Job Statuses window, click on **Xora Connector > Xora Setup > Launch Statuses**.
2. To create a new JobStatus, click Clear/New. Enter in the Job Status Name as it appears in Xora. This can be found at <https://apps.xora.com> under Setup > View Profiles. Then, select your profile and expand the Job Tracking section.
3. Check whether the Job Status should be trackable and then click **Save**.
4. To edit an existing Job Status, click **Select** beside it, then make the necessary changes below and clicking **Save**.
5. To delete an existing Job Status, click **Select** beside it, and then click **Delete**.
6. If you would like to setup default QuickBooks items for one or more Job Statuses, simply choose a Service Item, Class, Payroll Item and/or billable status before saving an entry. Leaving these fields blank will cause no mapping of QuickBooks items to the times in this instance.

Send/Map Xora Jobs

The Send/Map Xora Jobs window allows you to match QuickBooks Customers with Xora Jobs. A user can either enter the Job in Xora, then create a matching entry in the Send/Map Xora Jobs screen *or* they can create the job in the Send/Map Xora Jobs screen and later send it to Xora.

1. When a new time entry is fetched from Xora, Method will fill in the Class, Payroll, Service, Customer and BillableStatus for the time entry with a matching Job Number.
2. To open the Send/Map Xora Jobs screen, click on **Xora Connector > Send/Map Xora Jobs**.

3. The *Existing Mapped List* section is used to display a list of your existing Customer/Job mappings in a filterable grid. You can select an existing one by clicking **Select**.
4. The *Edit or Create Xora Job Mapping* section is used for editing the details of a new or existing Customer/Job Mapping.
5. To add in a new Customer-Job relationship, click **Clear/New** and fill out the *text boxes* and click **Save**.
6. When new times are fetched in from Xora, the Job number is compared to this list. If a matching Xora number is found then the Class, Payroll, Service, Customer and BillableStatus items will be used instead of your default preferences.
7. See *Editing and Sending Times to QuickBooks* for a quick mapping option.

Sending Jobs to Xora

Once you have successfully mapped Job/Customers in Method, you have the option to send these jobs to Xora. This will allow the mobile phone users to download the jobs and complete them. Coming full circle, you will bring in the completed Job/Shift Times from Xora, and Method will map the specific Items (i.e. Class, Service, etc) for the times that were associated with the Job/Customer Mapping. Before attempting to send jobs, make sure to setup Xora Users. This can be done by enabling *Xora User* and *Xora Employee Number* in the **Employee > Additional Info** tab, or the **Vendors/Subcontractors > Additional Info** tab.

1. To open the Send to Xora screen, click **Xora Connector > Send/Map Xora Jobs**.
2. Click **Select** beside a Job/Customer Mapping and click the **Send to Xora** button. If there are no mappings you will need to create one.
3. The Send to Xora screen will now appear.
4. Select at least one Xora User from the dropdown.
5. If there are no Xora Users to select from the dropdown list, you will need to set some of your Employees or Subcontractors as Xora Users. To do so, select the *Employees* tab, select an existing employee and click *Additional Info*. Alternatively, this can be done with a subcontractor by clicking *Vendors / Subcontractors > Additional Info*. The employee or subcontractor will need to be enabled as a Xora User, and a matching Xora Employee Number will need to be entered. This should be the same Employee Number as found in Xora, under *Setup > Users* here: <https://apps.xora.com/xoraapps/jsp/AppLogin.jsp>.
6. Finally, set a date range using the *Available from*, *Available to* and *Scheduled Start Time* date pickers then click **Send to Xora**. The results of sending the job will be returned by Xora and displayed in the *Xora Schedule Status* text area.
7. To send the job to Xora as unassigned, click the **Send to Xora as Unassigned** button.
8. If you would like to send the location of the job, make sure to enter the longitude and latitude of the Customer in Method. This can be found under **Xora Connector > Customers**. You will need to select a customer and enter their longitude and latitude under the *Address Info* tab and click **Save**. This information is not saved in QuickBooks.

Get Xora Time

With everything mapped and your preferences set, it is time to begin tracking times in Xora and then importing it into Method. The process would be as follows: You either create and dispatch several jobs in Method and send to Xora or do so from within Xora. The Xora user then downloads the jobs to their phone and begins tracking all associated times for their Shift and/or Jobs. Once they are finished, you can import those times to Method.

1. In order to retrieve new time entries from Xora, click the **Xora Connector > Connect with Xora** tab.
2. Next click the **Step 1: Get Xora Time** tab.
3. Choose a Date range by choosing a date for *Jobs/Shifts that start on or after*, and for *Jobs/Shifts that end on or before*.
4. Select one or more Xora Users that you would like to retrieve times for.
5. If there are no Xora Users to select from the dropdown list, you will need to set some of your Employees or Subcontractors as Xora Users. To do so, Select the *Employees* tab, select an existing employee and click *Additional Info*. Alternatively, this can be done with a subcontractor by clicking *Subcontractors > Additional Info*. The employee or subcontractor will need to be enabled as a Xora User, and a matching Xora Employee Number will need to be entered. This should be the same Employee Number as found in Xora, under Setup > Users here: <https://apps.xora.com/xoraapps/jsp/AppLogin.jsp>.
6. Click the **Get Xora Time** button.
7. If prompted, click **Run ClickOnce Application**.
8. The Method Xora Connector window will appear, and will display its progress at the bottom of the Window.
9. The results of fetching times from Xora will be displayed in the scrollable textbox. If a time is retrieved, it will display "*Retrieved new (Shift/Job/Travel) Time for user...*". If no times were located it will display "*No (Shift/Job) Times were located for the matched Xora Users*". If all times found already exist in the Step 2: Send to QuickBooks screen, it will display "*All available times are already in Method. No new times located.*".
10. If you would like to see the data that was returned by Xora, you can click the **Show Xora Data** button.
11. To view the time entries that were added, select the **Send to QuickBooks** tab. If no new entries appear, click the **Refresh** button.

Note: Only completed Shifts and Jobs will be returned. Additionally, Xora has throttling restrictions on some of its users which is why an error message from Xora might appear. Throttling is done to limit how often a call is made to the Xora server and how much data is returned. For a list of throttling rules which may affect retrieving Xora Times, please see the appendix.

Allocating Overtime

Most QuickBooks users assign different payroll items to their employees or subcontractors, depending on the work that was performed. The most commonly used is an Overtime Payroll Item, when a worker goes beyond the regular hours assigned to them. The Connect with Xora screen will allow you to allocate Overtime for service times that have been brought into Method.

1. Before attempting to allocate overtime, make sure you have a Default Overtime Payroll Item set in the **Xora Setup > Preferences** window. You should also have the Max Hours per Day and Max Hours per View entered as well.
2. In order to allocate overtime, click **Xora Connector > Connect with Xora**.
3. Select the **Step 2: Send to QuickBooks** tab.
4. A list of time entries will appear here, that have been brought in from Xora. If you currently do not see any time entries, try changing the Date Range and/or Filter by View and click **Refresh**.
5. Select the time entries that you would like Method to look for Overtime for by checking the boxes on the left. It is important to select all time entries related to that Day or View and not a single time entry.
6. Click **Allocate Overtime per Day** if you are tracking overtime on a daily basis. Each user's total time per day will be compared to the Maximum Hours per Day found from your preferences. If any day is found to go into overtime on a day, a new overtime service time will be added for the amount of minutes that went into overtime. In addition, service times will be retroactively removed and/or altered in order to compensate for the new overtime time entry. This is done so that each user's total time before this operation took place, matches their total time after allocating for overtime. This process will work with any viewable service times on one day or on multiple days.
7. Click **Allocate Overtime per View** if you are tracking overtime on any other basis. This can include weekly, biweekly, monthly or on a user by user basis. Each user's total time for the current view will be compared to the Maximum Hours per View found from your preferences. If the total time for any user is found to go into overtime, a new overtime service time will be created. This will make retroactive adjustments the same as the *Allocate Overtime per Day* operation.

Editing and Sending Xora Times to QuickBooks:

Once job and shift times have been fetched from Xora, it is now time to send them to QuickBooks. This is an intermediary step that gives you the ability to first alter / massage the times before sending to QuickBooks, if you choose to do so. Note also, that since the Xora Connector is built on the "Method Integration" platform, all screens are fully customizable, giving you the ability to add your own functionality, which can be especially useful in the massaging process.

1. In order to view or edit Time Entries before sending them to QuickBooks, click **Xora Connector > Connect with Xora**.
2. Select the **Step 2: Send to QuickBooks** tab.
3. A list of all time entries that were brought in from Xora will appear here. By default All times will appear. You can use the *Filter by View* dropdown at the top left to view either those Ready to Send, Already Sent or All. If you do not see any times appearing, set a date range for *View From* and *View To* and click **Refresh**.
4. By default, the fields appearing will be Employee, Customer, Start Time, End Time, Duration, Adjustment and Already Sent.
5. To view or edit a Time Entry, click the **Go To** link on the left.
6. Here adjustments can be made to each field and saved. Any changes will not affect Time Entries that have already been sent to QuickBooks.
7. When you are ready to post the time(s) to QuickBooks, use the checkboxes on the left and click **Send Selected to QuickBooks TimeTracking**, or click **Send All to**

- QuickBooks.** The time will be sent over only if it has not already been sent, which is indicated by the Already Sent column. If there are any problems with sending any of the time entries, none will be posted to QuickBooks.
8. During the sending process an employee, date, service item and payroll item and note will be sent. The actual duration in minutes that is sent to QuickBooks, will be the Duration (min) after Adjustment (min) is subtracted from it.
 9. You can click on the tab **Xora Connector > Time Tracking** to view which times are considered sent to QuickBooks. Make sure to click the **Refresh** button to refresh the grid.

In order to perform a quick mapping, click on the Customer/Xora Job Number that is appearing in the Customer column. This will bring up the Job/Customer Mapping window and will automatically fill in the Xora Job Number for you. Choose a Customer from the dropdown list, enter a Job Description and click **Save** then **Close**. You will notice after the grid refreshes, that all Xora Job Numbers have been mapped and changed to the corresponding QuickBooks Customer. A quick mapping will only update the Customer name, and not associated items in the Send/Map Xora Jobs window.

Appendix

QuickBooks Employee Troubleshooting

If the times do not appear in QuickBooks after sending them through the Xora Connector, it is possible that there is an issue with a QuickBooks employee. This is a known QuickBooks issue, but easy to rectify.

1. Click on **QuickBooks > Resolve Conflicts** tab.
2. Note the employee whose time is not transferring to QuickBooks.
3. Open QuickBooks.
4. Open the Employee Center.
5. Double click on the employee with the same name.
6. Select the Payroll Info tab.
7. Place a check inside the "Use time date to create paychecks" checkbox.
8. Click **OK**.
9. Double click on the same employee again.
10. Select the Payroll Info tab again.
11. Remove the check from "Use time date to create paychecks" checkbox. (Or it may remain checked if this is how you are using it)
12. Open the Method Integration Engine from the system tray. This is a brown and yellow 'm' icon next to your clock on your windows task bar. If you are unable to see it, try expanding the system tray.
13. Click on **Synchronize > Changes Only Synchronization**.
14. Once the process is completed, the times should be sent over.

Xora Throttling Errors

If you find that you are unable to retrieve times from Xora through the Method Connector, pay close attention to the error message that appears in the Method Xora Connector window. If the error message appears with the word "Xora Error", this points to an error

coming from Xora. It is possible that the information your account is being throttled for attempting to get too much data from Xora or too often. In this case, you can request Xora to remove the throttling from your account, which they may do in certain situations.

Date Range Super Set Rule

If consecutive Xora API calls have date ranges that are supersets (or same) of the previous call, then an error status will be sent to the client e.g.

1. From Date: 10:00, To Date: 11:00 Status: OK From Date: 10:00 To Date: 12:00 Status: OK, From Date: 10:00, To Date: 13:00 Status: NOT OK
2. From Date: 10:00, To Date: 11:00 Status: OK From Date: 10:00 To Date: 11:00 Status: OK, From Date: 10:00, To Date: 11:00 Status: NOT OK
3. From Date: 10:00, To Date: 11:00 Status: OK From Date: 11:00 To Date: 12:00 Status: OK, From Date: 12:00 To Date: 13:00 Status: OK
4. From Date: 10:00, To Date: 11:00 Status: OK From Date: 10:05 To Date: 11:05 Status: OK, From Date: 10:10, To Date: 11:10 Status: OK

Date Range Sum Rule

The sum of date ranges for a given day should not be more than 48 hours.

Date Range Limit Rule

If the time window is higher than or equal to 24 hours, the calls can be made between certain times on the server. e.g.: from date 00:00 and to date 24:00, this call is allowed only between 8PM PST and 1AM PST.

Frequency Rule

The calls can be made within a certain specified frequency. Any calls below that frequency would potentially not be serviced. e.g.: get location entries call can be made every 15 minutes. A call happening more than once within that time would not be serviced.

Job Error Count Rule

The sum of the jobs having errors should not exceed certain limit.

Item Limit Rule

The number of items allowed in the request should not exceed the limit.

Troubleshooting and Support FAQ

1. I'm Unable to Login to Method

If you are unable to login to Method, find the Welcome email you received when you first signed up for the Method-Xora Connector. This email was sent to the email account used for the sign up process. The subject of the email is "Welcome to Method's Xora Connector". Once this is located, perform the following:

1. Bring up the Login screen if it is not open already, here:
<https://www.methodintegration.com/method/Login.aspx>
2. Erase what is currently typed into Company Account, User Name and Password.
3. Enter the Company Account as it appears in the Welcome email.
4. Enter the User Name as it appears in the Welcome email.
5. Enter the Password as it appears in the Welcome email. This is case sensitive.
6. Click **Login**.
7. If you have forgotten your password, but know your Company Account and User Name, click **Retrieve Password** in the Method Login Screen.
8. If you are still unable to login, make sure you are using either Internet Explorer 7/8, or Firefox.
9. Another suggestion is to ensure JavaScript is enabled. For example, this can be found in Internet Explorer under **Tools > Internet Options** and then click **Security > Custom Level**. Under Scripting, Active scripting should be enabled.
10. If all else fails, call your Method Consultant toll free at 1-888-925-6238.

2. Method screens are not loading properly


Once logged in to Method, it might be apparent that a screen fails to refresh or does not load properly. If this is the case, you will want to perform the following:

1. Ensure you are using either Internet Explorer 7+ or Firefox.
2. Right Click in the background and choose **Reload Page**. If this option is not available, try right-clicking in a different section of the screen.
3. If the issue persists, Sign out of Method by clicking **Sign Out** in the top right corner.
4. Close and reopen the browser.
5. Re-open the browser and login to Method here:
<https://www.methodintegration.com/method/Login.aspx>
6. Ensure that you have JavaScript enabled in your browser.
7. Ensure that your screen resolution is at least 1024x768 pixels. You can find this by right-clicking on your Windows desktop, choosing **Properties**, and clicking on the **Settings** tab.

3. My QuickBooks data does not show up in Method

If upon initially synchronizing Method and QuickBooks, it might be possible that the QuickBooks information does not show up in Method. Alternatively, you might find that the synchronizing was working, but has now stopped. In either case, you will want to perform the following:

1. In Method, click the **QuickBooks** tab.
2. Click the **Resolve Conflicts** sub tab.
3. Click the **Refresh** button.
4. Ensure that there are no outstanding conflicts. You may choose to either accept or reject the change. A conflict occurs when a record is edited in both QuickBooks and Method at once.
5. Open QuickBooks, and the Method Integration Engine should open as well.

6. Open the Method Integration Engine (Usually found in the system tray with the following icon: ) If the program is not running, launch it from the Start menu.
7. Ensure that you are currently connected. You will need to verify that you have an internet connection, and that you have typed in the Company Account, User Name and Password exactly as they appear in the Welcome to Method's Xora Connector email.
8. Click **Synchronize > Full Synchronization**.
9. If there are any errors in the activity log during synchronization, make sure QuickBooks is up to date. You can check for updates in QuickBooks by clicking **Help > Update QuickBooks**. If there is still an error in the log, read the error message carefully, you might need to stop synchronization with a QuickBooks transaction type. This can be done in Method by clicking the **QuickBooks > Synchronize**, then click **Show Options per transaction type (click here)**. If you set the corresponding table to None, Method will not synchronize this table with QuickBooks.
10. If there are no errors in the log during synchronization, remove Method from the QuickBooks integrated applications screen and resynchronize. This can be done in QuickBooks by clicking **Edit > Preferences > Integrated Applications > Company Preferences**. Here you will need to delete Method from the list. Once this is done, reopen the Method Integration Engine and click **Synchronize > Full Synchronization**. You will be prompted with an application certificate, make sure to select Yes Always, continue (with admin selected) and done.

4. My employees aren't being listed in Method

If you find that employees are missing in Method under the Step1: Get Xora Time screen or under the Send to Xora screen, make sure you perform the following in Method:

1. Check the **Xora Connector > Employees** tab. If the employee does not appear here there is an issue with synchronization between Method and Xora. In which case check for conflicts under **QuickBooks > Resolve Conflicts** or resynchronize from the integration engine by clicking **Synchronize > Full Synchronization**.
2. Make sure that the employee is setup as a Xora user. This can be done by the clicking **Xora Connector > Employees** tab in Method. Next click the **Additional Info** tab. The user should be checked as a Xora User, and Xora Employee Number should not be blank. It is very important the Xora Employee Number match what is in Xora. This can be found in the Xora account at <https://apps.xora.com> under **Setup > Users > View/Edit Users**.
3. If you are on the Step1: send to QuickBooks tab/ Sent to Xora screen and no employees are appearing, and you have verified they are setup properly. Right click in the background and choose **Reload Page**.

5. Sending Jobs to Xora failed

When sending a job to Xora, there is a chance that it can fail, and an error message will be displayed to at the bottom, beside Xora Schedule Status. The error message will usually explain why the job failed to go over to Xora. In order to send a job from Method into Xora, it must meet the following requirements:

15. The job you are sending must have a Xora Job Number and a Job Description. This can be verified from the **Send/Map Xora Jobs** tab.
16. If you are not sending the job as unassigned, you must select one or more employees.
17. The *scheduled Start Time* must be between the *Available From* and *Available To* time.
18. The *Available To* Time must be greater than the current time.
19. The job must not already be scheduled in Xora and uncompleted. This can be checked by logging into Xora here: <https://apps.xora.com> and then by clicking **Dispatch > View Scheduled Times**. Be aware that the Job might exist somewhere in the past, present or future, and for the same or different Xora User.

6. Retrieving Times from Xora failed

If you find that you are unable to retrieve times from Xora through the Method Connector, pay close attention to the error message that appears in the Method Xora Connector window. If the error message appears with the word "Xora Error", this points to an error coming from Xora. Also, make sure you meet the following criteria:

1. The throttling has been relaxed on the Xora Account.
2. You must have the Microsoft 3.5 .Net Framework installed. This can be downloaded here: <http://www.microsoft.com/downloads/details.aspx?FamilyId=333325FD-AE52-4E35-B531-508D977D32A6&displaylang=en> If the Xora Connector is failing to run, make sure you have setup your browser as discussed in the Prerequisites section. Additionally, you will want to make sure all of the .Net framework updates have been installed.
 - Open Internet Explorer and click **Tools > Windows Update**.
 - Click the **Custom** button and a search will commence.
 - Once the search completes, click the **Software Optional** link and download any updates pertaining to the .Net framework.

Note: Additional updates can become available after installing new Windows Updates. The previous steps will need to be performed multiple times, until no new updates are available.
- 3.
4. The Method account information has been entered in Method, under **Xora Setup > Preferences**.
5. The Xora account information has been entered in Method, under **Xora Setup > Preferences**. (This should be the admin account)
6. The Xora user is running a version of Xora that is compatible with the Method-Xora Connector.
7. The Method Employee has been properly matched to a Xora User by the Xora Employee Number field.
8. The specified Date range is valid by Xora's specifications.
9. Ensure that you are looking for Shifts/Jobs/Custom Jobs in **Xora Setup > Preferences**.
10. Ensure the times exist in Xora. This can be done by running a Combo Job/Shift report when logged in at <http://apps.xora.com>.

11. Ensure the times do not already exist in Method. This can be done by clicking the Step2: Send to QuickBooks tab, and filtering the grid on a date range, or by an employee or job number.

7. Sending Times to QuickBooks from Method failed

When sending times from Method to QuickBooks it is possible that this process will fail. This is because if there is a problem with one or more times, the entire batch fails in sending over. Make sure of the following for the selected times:

1. They are not marked as Already Sent.
2. They do not have a number or misspelled Customer name in the Customer field/column.
3. The adjustment for a time entry must not be greater than its duration.
4. The Employee name, Payroll Item name, Billable Status name, Class name and Service Item name must be exactly as they appear in QuickBooks.

8. Where are the times located in QuickBooks?

After sending times from Method to QuickBooks, the times will be inserted into the Weekly Timesheet. To view the times in QuickBooks:

1. In QuickBooks, open the Employee Center.
2. Select an employee who had times recently sent to QuickBooks.
3. Click **Enter Time > Use Weekly Timesheet**.
4. Adjust the timesheet so that you are looking at the proper week, where the times should appear.
5. If the times do not appear here, make sure there are no synchronization issues between Method and QuickBooks. This can be done in Method by clicking **QuickBooks > Resolve Conflicts**. You can also perform a changes only synchronization, by opening the Method Integration Engine and then by clicking **Synchronize > Changes Only Synchronization**.

9. Why are times assigned a number instead of a Customer?

When times are brought from Xora into Method, the Xora Job number is initially placed in the Customer field. Method then looks in the Send/Map Xora Jobs screen for the same Job Number. If the same Job number is found, Method will alter the time to display the Customer Name instead of the Job Number. Also, if there are any assigned QuickBooks items to this pairing, they will be assigned to the time entry as well. Please keep in mind:

1. This process happens when times are being brought into Method, and not after. This means existing times will not be affected.
2. The Method Xora Connector includes a QuickMapping feature. This allows you to click on the Job Number as it appears in the Customer Column within the **Step 2: Send to QuickBooks** screen. You can then map the Job number to a Customer, enter a description and click **Save**. The window will close and all entries in the grid

will be updated to the proper Customer Name. This will not update the associated QuickBooks items.

3. If there is no Job Number appearing in the Customer column, this means that this is a Shift time and not a Job time, therefore, no job needs to be associated.

10. How do I get a time assigned to the correct QuickBooks Service Item?

If you have service items setup in QuickBooks, and would like to associate one or more to Xora times as they are brought into Method, check the following:

1. In Method, click **Xora Setup > Launch Preferences**. Here you can set a default Service Item to times as they are brought into Method. Leaving this blank will result in no default Service Item being applied.
2. In Method, click **Send/Map Xora Jobs**. In this screen you are able to create a mapping of a Xora Job to a Xora Customer. You can also specify default QuickBooks items such as Service time. When jobs are brought into Method and this mapping is found, a default service item will be inserted if it has been set.
3. In Method, click **Xora Setup > Launch Mapping** (Under Flex Field Value Mapping). If you are tracking actual values of Xora Flex Fields, you can create a pairing here. This will consist of the FlexField name and value you are looking for. You can then set a default Service Item for this pairing. When times are brought in, and a FlexField match is found, if a service item is set here it will be applied to the time.
4. In Method, click **Xora Setup > Launch Statuses**. If you are using Custom Job Times in Xora, you can set default QuickBooks items to Job Statuses. This includes Service Time. Leaving this blank will result in no default Service Item being set.