

Method Professional Services

Quick Start Guide 2.0

www.methodintegration.com

Contents

Method Professional Services Overview	4
What is “Method”?	4
How do I get Method Professional Services?	4
How do I add more advanced functionality, specific to my company?.....	5
Important Recommendations	5
What’s coming on the horizon?.....	5
Prerequisites	5
Permissions and App Settings	5
Linking my Method user to a QuickBooks Employee or Vendor	6
Setting Professional Service User Permissions	6
Setting Job Cost and Billing Rate details for Employees.....	7
Setting Job Cost and Billing Rate details for Vendors.....	7
“A to B” tutorial.....	7
Tutorial: Creating the contract and posting an invoice to QuickBooks.....	8
Step 1: Synchronizing with QuickBooks.....	8
Step 2: Creating your first Budget/Contact	8
Step 3: Schedule a Project Activity	8
Step 4: Complete Activity and Enter Time.....	9
Step 5: Enter Straight Time.....	9
Step 6: Enter Expenses	9
Step 7: Approve and Send Expenses to QB	10
Step 8: Invoicing.....	10
Professional Services	10
Budgets/Contracts.....	10
Create a new project	11
Bill To / Ship To Address	12
View Activities.....	12
View Time Entries	12
View Expense Entries.....	12

View Project Summary	13
Editing a budget/contract.....	13
Closing budgets/contracts	13
Invoicing a project	13
Activities	13
Add activity	13
Edit project activity	14
Delete project activity	15
Time Entries.....	15
Add time entry.....	15
Submit time entries	16
Approve time entries	16
Reassign time entries.....	16
Edit time entries	17
Delete time entries	17
Expense Entry	17
Entering expense entries	17
Submit expense entries	18
Approve expense entries.....	18
Reassign expense entries.....	18
Edit expense entries	19
Delete expense entries	19
Creating Invoices	19
Getting assistance & customization	19

Method Professional Services Overview

Method Professional Services is an app built on the Method Integration platform for the professional-service industry.

Method Professional Services is an app that fulfills the budget/contract requirements that many QuickBooks users will face during their day-to-day use. QuickBooks users who enter time and expense against budget/contracts often require more rules, budget features and billing requirements. Regardless of the job being considered, Method Professional Services will allow you to track time and expense from something as simple as a fixed or hourly contract to those that take into consideration budgeted time and expenses.

Method Professional Services seeks to be the bridge between current industry features in QuickBooks and those do not currently exist.

- Companies that track time and expense against budget/contracts that need to enforce automatic preferences, monitoring and rules.
- Time and expense entries have no approval process in QuickBooks.
- Manual adjustments of Billable/Non-Billable time and expense entries in QuickBooks are not sufficient. Automatic monitoring and adjustments are required.
- Companies that provide services by appointment require a system to maintain scheduled services for future time and expense entry.

Examples of Professional Services include: accountants, architects, attorneys and law firms, consultants, engineers, physicians, public relations professionals, recruiters, and web designers to name a few.

What is “Method”?

The Method Integration platform uses its own patent-pending, bi-direction syncing engine that synchronizes every QuickBooks list and transaction in real-time between a desktop app and a web server. This enables Method to sport a live web-based version of your desktop QuickBooks, along with a Sales Center and Call Center for CRM capabilities. You can then install other “apps” (like Method Professional Services) to add industry-specific functionality. Finally, everything you see is built using the same tools you have access to, enabling you to create your own fields, tables, screens, actions, customer portals, and more. Your days of limited one-size-fits-all, industry-specific, boxed software are over. Method Professional Services brings in a new era of company-specific freedom.

How do I get Method Professional Services?

If you are not already a user on the Method Integration platform, visit the following website and go through the signup process:

<https://www.methodintegration.com/>

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

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

Method Professional Services is built to meet 90% of your needs and leaves it up to you to customize the last 10% to your specific requirements. Customization can be done by yourself at your own pace or by contacting your consultant to get some assisted services.

Important Recommendations

Community. Method is heavily community-based, so make use of it. You'll find that there are some power users out there who have already customized screens similar to how you want them customized, and would be more than happy to share their work with you. Visit the Method community at: <http://www.methodintegration.com/cs/>

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

What's coming on the horizon?

Creating Budget/Contract Estimates. For some companies their budget/contract process starts at the Estimate level. In the near future you'll see the option to create an estimate and quickly flip it to a budget/contract for use.

Method Reports. The Method platform includes a powerful report designer, and shortly after beta we will be working to design and include even more powerful reporting for the Professional Services App.

Prerequisites

Method Professional Services allows time entries to be tracked for employees/vendors who charge various billing rates and therefore requires an edition of QuickBooks that supports billing rates.

The following editions of QuickBooks Pro, Premier or Enterprise 2007 or higher are compatible with Method Professional Services:

- Contractor Edition
- Professional Services Edition
- Accountants Edition`

Permissions and App Settings

A Method user is someone who signs in to and uses Method, they can be an employee, subcontractor or other person. Setting someone up as a Method user will grant them access to Method Professional Services so that they can sign in, create projects, enter time and expense entries and invoice.

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 as being Inactive so that they can still be assigned work, but cannot sign in.

Linking my Method user to a QuickBooks Employee or Vendor

Try to link as many Method users to QuickBooks employees or vendors as possible. This will automate some of the time entries within the app and avoid having to select a Method user and remember the QuickBooks equivalent.

To edit Method user settings, follow the steps below:

1. Click the **Customize** tab.
2. Click the **Users** tab link.
3. In the *Edit an existing User* section, click **Edit** beside the user.
4. For *Link to Employee / Vendor / OtherName (optional)*, choose a QuickBooks employee or vendor to link this user to.

Setting Professional Service User Permissions

By default the Method admin will always have access to the Professional Service Setup and Permissions screen. From here he or she can empower additional users by granting them additional privileges.

To edit user permissions, follow the steps below:

1. Go to **Professional Services > Dashboard**.
2. Click the **'Setup & Permissions...'** link.
3. Click the **View / Edit Permissions** section tab.
4. Using the grid apply the desired permissions.
5. Click **Update**.

ProService Permissions:

If checked, the Method user will have access to the permissions screen and the ability to modify permissions for other Method users.

Approve Time:

If checked, the Method user has rights to approve & delete time entries.

Approve Expense:

If checked, the Method user has rights to approve & delete expense entries.

Setting Job Cost and Billing Rate details for Employees

In order to do proper job costing, you will be required to enter a default job cost rate for employees. This will be used to determine the cost of services performed on the contract.

Note: Billing rates can only be created and modified in QuickBooks and a full sync is required to send that information immediately to Method, otherwise it will be sent over on the scheduled changes only sync.

To edit user permissions, follow the steps below:

1. Go to **Professional Services > Dashboard**.
2. Click the '**Permissions...**' link.
3. Click the **Employee Billing Rates** section tab.
4. Using the grid, select the *Billing Rate* for each employee.
5. Using the grid enter the value for *Job Cost Rate* column for each employee.
6. Click **Update**.

Setting Job Cost and Billing Rate details for Vendors

In order to do proper job costing, you will be required to enter a default job cost rate for vendors. This will be used to determine the cost of a particular service item performed on the project.

Note: Billing rates can only be created and modified in QuickBooks and a full sync is required to send that information immediately to Method, otherwise it will be sent over on the scheduled changes only sync.

To edit user permissions, follow the steps below:

1. Go to **Professional Services > Dashboard**.
2. Click the '**Permissions...**' link.
3. Click the **Vendor Billing Rates** section tab.
4. Using the grid, select the *Billing Rate* for each vendor.
5. Using the grid enter the value for *Job Cost Rate* column for each vendor.
6. Click **Update**.

“A to B” tutorial

One of the best ways to get acquainted with Method Professional Services is to run through simple A to B tutorial.

Tutorial: Creating the contract and posting an invoice to QuickBooks

Step 1: Synchronizing with QuickBooks

First things first, if you have not already synchronized your Method with QuickBooks, you must do so before continuing with this tutorial. If you have not done so already, go to the QuickBooks Tab, and click on the Synchronize Tab Link and follow the installation steps to install the Method Integration Engine and complete a full synchronization with QuickBooks. Make sure that you close and reopen QuickBooks after the initial synchronization is complete so that the real-time syncing is activated. Also be sure you meet the [QuickBooks prerequisites](#).

Step 2: Creating your first Budget/Contract

We'll start by creating a new budget/contract from the Professional Services tab.

1. Go to **Professional Services > Budgets/Contracts**.
2. From the dropdown list specific a Customer:Job.
3. Optional: enter other Budget/Contract details such as a memo.
4. Click **Save**.
5. Click the 'Add Line Item...' link. Notice you will get the Add/Edit Budget Details pop up screen.
6. From the Item dropdown select an **Item** that you will add to the budget / contract.
7. Select the Charge Type for this item.
8. Optional: Select the Billing Rate to be applied for the item.
9. Finalize any changes to the selected Item, such as the *Description*, *Class*, *Budgeted Qty*, *Budgeted Amount*, *Rate*, *Charge Qty*, *Class* and etc.
10. Click **Save & Close**.
11. Optional: repeat the steps above to add additional items to the budget/contract.

Step 3: Schedule a Project Activity

In this step we'll schedule a date/time to perform one of the services you choose from the Items you added to the Budget/Contract. Note, to skip the scheduling aspect proceed to the next section to track straight time.

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Activities section click '**New Activity...**'.
4. Select the Activity Type.
5. From the Item dropdown, select the Item found on the budget / contract.
6. Set the *Due Date Start* for the Project Activity.
7. Set the *Due Date End* for the Project Activity.

8. Optional: change the *priority* of the project activity.
9. Click **Save & Close**.

Step 4: Complete Activity and Enter Time

In this step we will go back to the details of the scheduled activity and enter actual time.

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Activities section click the 'Go to...' link beside the desired activity.
4. Click **'Complete & Enter Time as Scheduled...'**
5. Confirm and finalize any changes to the time entry, such as the Billable Status, Payroll Item, Notes and etc.
6. Assuming you have permission to approve time, click **'Activities...'** and then **Approve**.
Note: If you do not have permission someone who does will have to come back and approve time before it can be invoiced.

Step 5: Enter Straight Time

If scheduling activities is not important, you can consider entering direct time entries instead.

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Time Tracking section click **'Enter Time...'**
4. From the Item dropdown, select the **Item** found on the budget/contract.
5. Manually enter a duration or start the timer.
6. Confirm and finalize any changes to the time entry, such as the Billable Status, Payroll Item, Notes and etc.
7. Assuming you have permission to approve time, click **'Activities...'** and then **Approve**.
Note: If you do not have permission someone who does will have to come back and approve time before it can be invoiced.

Step 6: Enter Expenses

If your budget/contract has an item with the charge type containing 'Expense' the next step we'll enter the expense details. Note Method Professional Services only allows expenses as items.

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Expenses section click **'Enter Expense...'**
4. From the Item dropdown, select the **Item** found on the budget/contract.
5. Confirm and finalize any changes to the time entry, such as the Quantity, Cost, Amount, Billable Status, Class and etc.
6. Click **'Activities...'** and then **Submit**.

7. Click **Save & Close**.

Step 7: Approve and Send Expenses to QB

Expense entries can be entered and tracked in Method Professional Services and then sent to QuickBooks as Bills or Checks. In order for expenses to be eligible to be sent to QuickBooks, they must first be in a submitted status.

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Expenses section click the 'Go to...' link beside the desired expense(s).
4. Click **'Send to Accounting...'**
5. Select to send the expense(s) as bills or checks.
6. Finalize the Bill or Check details.
7. Click Create Bill/Check.

Step 8: Invoicing

In this step we'll invoice the budget/contract.

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. Optional: Finalize changes to the budget/contract such as changing the status to completed and Click **Save**.
4. Click **'Create Invoice...'**.
5. Place a checkbox beside all items you want converted into an invoice.
6. If applicable choose to apply any retainer amount to the invoice.
7. Click Next.
8. Optional: make final edits on the quantity for each line item. Hint this is where you can do progress billing.
9. Click **Save & Close**.

Professional Services

The Professional Services tab serves as a central hub for budget/contract information, activity scheduling, time and expense entry and creating invoices.



Change Role: Professional Services

Professional Services
Dashboard | Customer List | Budgets / Contracts | Invoices | Reports

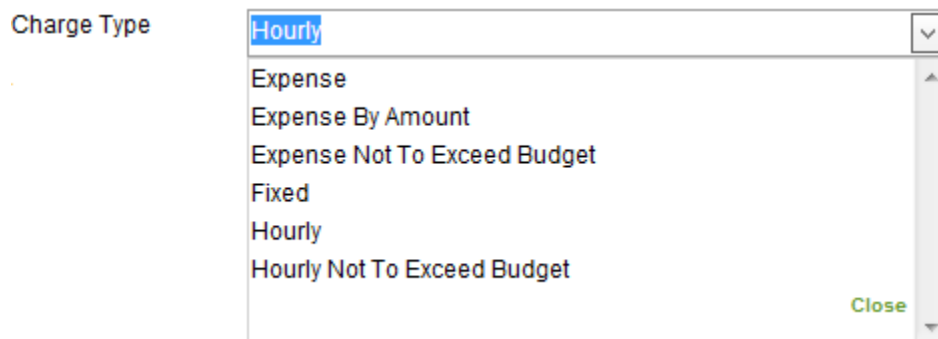
Budgets/Contracts

Think of budgets and contracts like customer jobs or projects with a little more structure and rules behind them. Budgets and contracts are generally the result of an agreement or contract between the company and the client for service to be performed.

Create a new project

To create a new project, follow these steps:

1. Go to **Professional Services > Budgets/Contracts**.
2. From the dropdown list specific a Customer:Job.
3. Optional: enter other Budget/Contract details such as a memo.
4. Click **Save**.
5. Click the 'Add Line Item...' link. Notice you will get the Add/Edit Budget Details pop up screen.
6. From the Item dropdown select an **Item** that you will add to the budget / contract.
7. Select the Charge Type for this item.



Fixed -agreed upon fixed price

Services based on an agreed upon fixed price or a contract amount. The quantity serves as a maximum or cap value the time entries are automatically compared against so they do not push the total over this amount. Time entries that push over the maximum value are automatically adjusted so the fixed amount is not exceeded.

Hourly –billed by the hour

Hourly services have a default quantity of zero because when first declared there is no time against them. As time is entered and approved, these hourly services will be automatically updated with the accumulated quantity.

Hourly Not To Exceed Budget - billed by the hour to a budgeted quantity

Similar to Hourly services, Hourly Not To Exceed Budget services are automatically updated as time is entered and approved. However, these services have an agreed upon maximum that services as the ceiling amount to be invoiced. Time entries that push over the maximum value are automatically adjusted so the maximum is not exceeded.

Expense -agreed upon fixed price

Expenses based on an agreed upon fixed price or a contract amount. The quantity serves as a maximum or cap value the time entries are automatically compared against so they do not push the total over this amount. Expense entries that push over the maximum value are automatically adjusted so the fixed amount is not exceeded.

Expense By Amount –expenses are invoiced as entered and approved.

In many cases you will want to expense what is approved as billable. This is when you would use Expense By Amount.

Expense Not To Exceed Budget - billed by the hour to a budgeted quantity

Similar to Expense By Amount, the Expense Not To Exceed Budget use the budgeted amount as a cap value that is not to be exceeded when invoicing. Accumulated amounts are automatically updated as expenses are entered and approved. Expense entries that push over the maximum value are automatically adjusted so the maximum is not exceeded.

8. Optional: Select the Billing Rate to be applied for the item.
9. Finalize any changes to the selected Item, such as the *Description*, *Class*, *Budgeted Qty*, *Budgeted Amount*, *Rate*, *Charge Qty*, *Class* and etc.
10. Click **Save & Close**.
11. Optional: repeat the steps above to add additional items to the budget/contract.

Bill To / Ship To Address

The billing and shipping address info is automatically copied from the the customer:job of the budget/contract.

View Activities

1. Go to **Professional Services > Budgets/Contracts**.
2. Click the **Activities** section.
3. In the *Existing Activities* grid, click 'Go to...' next to the desired activity you wish to view.

View Time Entries

1. Go to **Professional Services > Budgets/Contracts**.
2. Click the **Time Tracking** section.
3. In the *Existing Time Tracking* grid, click 'Go to...' next to the desired time tracking you wish to view.

View Expense Entries

1. Go to **Professional Services > Budgets/Contracts**.

2. Click the **Expenses** section.
3. In the *Existing Expenses* grid, click 'Go to...' next to the desired expense you wish to view.

View Project Summary

1. Go to **Professional Services > Budgets/Contracts**.
2. Click the **Summary** section.

Editing a budget/contract

1. Go to **Professional Services > Budgets/Contracts**.
2. In the *Existing budget/contracts* grid, click **Select** next to the appropriate budget/contract you wish to edit.
3. Edit the information as applicable.
4. Click **Save**.

Closing budgets/contracts

To close a project, follow these steps:

1. Go to **Professional Services > Budgets/Contracts**.
2. In the *Existing budget/contracts* grid, click **Select** next to the appropriate budget/contract you wish to edit.
3. Click the **Details** section.
4. Change the *status* to **Completed**.
5. Finalize any other changes.
6. Click **Save**.

Invoicing a project

To create invoice from budget/contracts follow these steps:

1. Go to **Professional Services > Budgets/Contracts**.
2. In the *Existing budget/contracts* grid, click **Select** next to the appropriate budget/contract you wish to edit.
3. Click '**Create Invoice...**'.

Activities

Having Activities is what allows us to plan and schedule, reassign our time and have it appear on a calendar. These activities can then be converted to record actual time entries which are recorded against the contract/budget.

Add activity

To add an activity, follow these steps:

Using the budgets/contracts screen

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Activities section click '**New Activity...**'.
4. Select the Activity Type.
5. From the Item dropdown, select the Item found on the budget / contract.
6. Set the *Due Date Start* for the Project Activity.
7. Set the *Due Date End* for the Project Activity.
8. Optional: change the *priority* of the project activity.
9. Click **Save & Close**.

Using the Calendar

1. Go to **Professional Services > Dashboard**.
1. Click inside the calendar and while holding down your mouse drag down the duration you want to schedule for.
2. Right-click with your mouse on the selected area and choose **New**.
3. Select the Activity Type.
4. From the dropdown select the Customer.
5. From the dropdown select the Budget ID.
6. From the Item dropdown, select the Item found on the budget / contract.
7. Optional: change the *priority* of the project activity.
8. Finalize other changes to the activity.
9. Click **Save & Close**.

Edit project activity

Note restrictions may apply based on Method user and approval status.

Using the budgets/contracts screen

1. Go to **Professional Services > Budgets/Contracts**.
2. Click the **Activities** section.
3. In the *Existing Activities* grid, click 'Go to...' next to the desired activity you wish to view.
4. Finalize any changes.
5. Click **Save & Close**.

Using the calendar

1. Go to **Professional Services > Dashboard**.
2. Locate and double click the activity on the calendar.
3. Finalize any changes.

4. Click **Save & Close**.

Delete project activity

Note restrictions may apply based on Method user and approval status.

Using the budgets/contracts screen

1. Go to **Professional Services > Budgets/Contracts**.
2. Click the **Activities** section.
3. In the *Existing Activities* grid, click 'Go to...' next to the desired activity you wish to view.
4. Click **Delete**.

Using the calendar

1. Go to **Professional Services > Dashboard**.
2. Locate and double click the activity on the calendar.
3. Click **Delete**.

Time Entries

Recording time is one of the most important aspects of Method Professional Services. The ability to accurately track all time against a budgets and contracts is critical.

Add time entry

To add a time entry, follow these steps:

From a scheduled activity using the budgets/contracts screen

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Activities section click the 'Go to...' link beside the desired activity.
4. Click **'Complete & Enter Time as Scheduled...'** to enter the time as scheduled.
*Note: You can also click the **'Timer...'** from a scheduled activity.
5. Confirm and finalize any changes to the time entry, such as the Billable Status, Payroll Item, Notes and etc.
6. Click **Save & Close**.

From a scheduled activity using the calendar

1. Go to **Professional Services > Dashboard**.
2. Locate and double click the activity on the calendar.
3. Click **'Complete & Enter Time as Scheduled...'** to enter the time as scheduled.
*Note: You can also click the **'Timer...'** from a scheduled activity.

4. Confirm and finalize any changes to the time entry, such as the Billable Status, Payroll Item, Notes and etc.
5. Click **Save & Close**.

Using the timer from the budgets/contracts screen

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Time Tracking section click '**Enter Time...**'.
4. From the Item dropdown, select the **Item** found on the budget/contract.
5. Manually enter duration or start the timer.
6. Confirm and finalize any changes to the time entry, such as the Billable Status, Payroll Item, Notes and etc.
7. Click **Save & Close**.

Submit time entries

By default all time entries are entered with an approval status of 'Not Submitted' This allows the user to record the time and submit only when they are ready to do so.

To submit time entries, follow these steps:

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Time Tracking section click the '*Go to...*' link beside the desired time entry.
4. Click '**Activities...**' and then **Submit**.

Approve time entries

In order to approve time entries, a user must have permissions set do so. Please see the [permissions](#) section to view / edit permissions.

To approve time entries, follow these steps:

5. Go to **Professional Services > Budgets/Contracts**.
6. Select the budget/contract.
7. In the Time Tracking section click the '*Go to...*' link beside the desired time entry.
8. Assuming you have permission to approve time, click '**Activities...**' and then **Approve**.
Note: If you do not have permission someone who does will have to come back and approve time before it can be invoiced.

Reassign time entries

At one point or another you will want to assign or reassign time entries to the appropriate person who will handle the next step in the time entry approval process. Pending Time Entries should be Assigned To

someone who will approve them. If the time entry requires modification it can be modified by someone with approval rights or flipped back and re-assigned to the user who entered the time.

To re-assign time entries, follow these steps:

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Time Tracking section click the '*Go to...*' link beside the desired time entry.
4. Change the *Assigned To* as applicable.
5. Click **Save**.

Edit time entries

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Time Tracking section click the '*Go to...*' link beside the desired time entry.
4. Edit the information as applicable.
5. Click **Save**.

Delete time entries

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Time Tracking section click the '*Go to...*' link beside the desired time entry.
4. Click **Delete**.
5. Click **OK** to confirm or **Cancel**.

Expense Entry

In addition to time entries, Method Professional Services accommodates for expenses to be entered towards a budget/contract. These are the expenses that a business will incur on behalf of the customer or while completing work for which can be billed back to the customer. Reimbursable expenses can be entered towards a project as billable and assigned to the customer so they can eventually be transferred onto the invoice. Method Professional Services allows expenses to be sent to QuickBooks as Bills and Checks.

Entering expense entries

To enter an expense entry, follow these steps:

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Expenses section click '**Enter Expense...**'.
4. From the Item dropdown, select the **Item** found on the budget/contract.

5. Confirm and finalize any changes to the time entry, such as the Quantity, Cost, Amount, Billable Status, Class and etc.
6. Click **Save & Close**.

Submit expense entries

By default all expense entries are entered with an approval status of 'Not Submitted' This allows the user to record the entry and submit only when they are ready to do so.

To submit an expense entry, follow these steps:

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Expenses section click the 'Go to...' link beside the desired expense entry.
4. Click '**Activities...**' and then **Submit**.

Approve expense entries

The approval of expense entries takes place when the expense is sent to QuickBooks as a Bill or Check. In order to approve expense entries, the entry must be in Pending status and the user must have permissions set do so. Please see the [permissions](#) section to view / edit permissions.

To approve expense entries, follow these steps:

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Expenses section click the 'Go to...' link beside the desired expense(s).
4. Select all expense entries that apply.
5. Click '**Send to Accounting...**'
6. Select to send the expense(s) as bills or checks.
7. Finalize the Bill or Check details.
8. Click Create Bill/Check.

Reassign expense entries

At one point or another you will want to assign or reassign expense entries to the appropriate person who will handle the next step in the approval process. Pending Expense Entries should be Assigned To someone who will approve them. If the expense entry requires modification it can be modified by someone with approval rights or flipped back and re-assigned to the user who entered it.

To re-assign expense entries, follow these steps:

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Expenses section click the 'Go to...' link beside the desired expense entry.

4. Change the *Assigned To* as applicable.
5. Click **Save**.

Edit expense entries

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Expenses section click the 'Go to...' link beside the desired expense entry.
4. Edit the information as applicable.
5. Click **Save**.

Delete expense entries

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Expenses section click the 'Go to...' link beside the desired expense entry.
4. Click '**Activities...**' and then **Delete**.
5. Click **OK** to confirm or **Cancel**.

Creating Invoices

Once a project is complete and all items entered and time and expenses entries are approved, the information is in place to create invoices.

In this step we'll turn the budget/contract into a QuickBooks invoice.

1. Go to **Professional Services > Budgets/Contracts**.
2. Select the budget/contract.
3. In the Details section Click '**Create Invoice...**'.
4. In the pop up screen, place a checkbox beside all items you want converted into an invoice.
5. If applicable choose to apply a retainer amount to the invoice.

Note: Retainers are items on an invoice, sales order or credit memo with an account type of 'OtherCurrentLiability'. As such you can invoice your client for a retainer deposit, complete this via a sales order and also take into consideration any credit memos applied

6. Click **Next**.
7. Optional: make final edits on the quantity for each line item. Hint this is where you can do progress billing.
8. Click **Save & Close** to send the Invoice to QuickBooks..

Getting assistance & customization

Get to know your Method rep, whether they be a Method Consultant, or a 3rd party Method Solutions Provider. They are here to make the transition to Method Professional Services as easy as possible with training and customization services. Remember, almost everything in Method can be customized, whether it is adding or removing tables and fields, creating new screens, setting user permissions, or creating a “Do this!!” button that performs a repetitive data entry function.....the sky is the limit. If you don't know who your rep is, email method@methodintegration.com, or call toll free at 1-888-9-ALOCET.

Stay tuned to the blog. Get to know us, our beliefs, and take advantage of our tips & tricks. We try to write a blog entry at least once a week. <http://methodintegration.com/cs/blogs/>

Ask questions on the forum. Talk with Method staff directly, as well as other Method users. Join the community. We want to hear from you. <http://methodintegration.com/cs/forums/>