

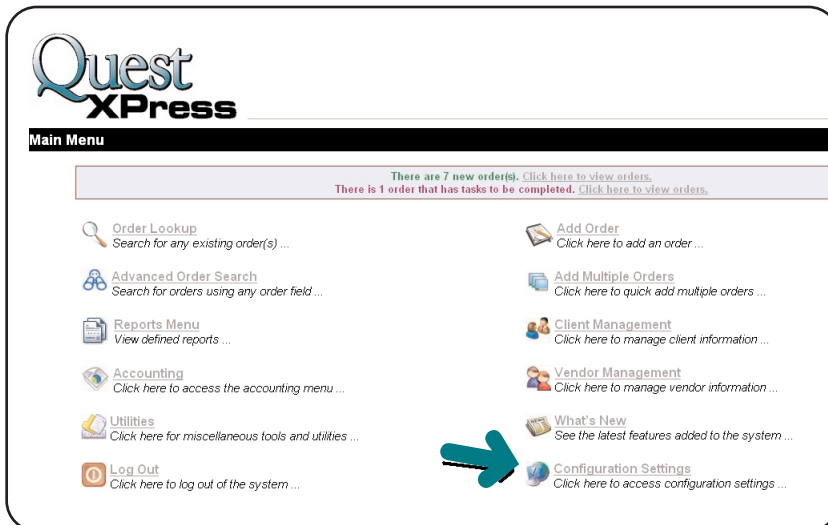


## Register for use of the System

- Go to [www.questxpress.com](http://www.questxpress.com) and click on the “Click here to Register” Link
- Fill in the appropriate information and follow system prompts
- You will receive a confirmation email once you have successfully registered

## Steps to take to set up Your Account

- Go to [www.questxpress.com](http://www.questxpress.com) and type in your **Username** and **Password** - Hit “Sign In”
- After logging in, choose the **Configuration Settings** option from the Main Menu



**Note: We can help with repetitive tasks and importing databases. Feel free to contact us, so we can help!**

Go here to learn more:

[www.questxpress.com](http://www.questxpress.com)

Or call us at:

**888.922.3669**



- You should now be on the **Configuration Menu** page, click on each of the individual headers and perform the system prompts as follows:

**Configuration Menu**

[Return to Menu](#)

<a href="#">Branch Setup</a> Configure Branch Information ...	<a href="#">Billing Types</a> Configure Billing Types ...
<a href="#">Service State Setup</a> Configure States that we service ...	<a href="#">Instrument Types</a> Configure Instrument Types ...
<a href="#">Tier Setup</a> Configure Pricing Tier Information ...	<a href="#">Copy Types</a> Configure Copy Types ...
<a href="#">County Setup</a> Configure Counties we Service...	<a href="#">General Site Configuration</a> Configure global information used in the site ...
<a href="#">Order Type Grouping</a> Configure order type grouping for reports and filters ...	<a href="#">Frequently Asked Questions</a> Configure the FAQ section of the website ...
<a href="#">Order Types</a> Configure Order Types ...	<a href="#">Custom Field Naming</a> Configure custom field naming for order fields ...
<a href="#">Billing Terms</a> Configure your billing terms for customers ...	<a href="#">Multiple Line Order Entry</a> Configure your multiple line order entry display items ...

## ■ Branch Setup

- A Default Branch is created upon setup
- If you company has multiple branches, Add them here ...

Branch Name:

Address:

**NOTE:** Throughout the system required fields are **YELLOW** - You must fill in these fields before the system will accept your entries

## ■ Service State Setup

- Enter the states that you service

**NOTE:** Throughout the system Select the **REMOVE ICON**  if you want to remove any existing entered items.



## ■ Pricing Tier Setup (*Important Concept*)

- Pricing Tiers are used for a layered pricing approach. For example: if you offer a **2 Owner Search** in 6 counties and 4 of the counties are of geographic disadvantage due to the effort required to access the information. See scenarios below:
  - Counties 1 and 2 are close so they reside in Tier 1 and have a base price of \$40
  - Counties 3 and 4 are 20 minutes away so you want to charge a little more, let's say \$60.
  - Counties 5 and 6 are 40 minutes away and require more effort to extract information. We probably want to use \$85 as the base price.
- A default tier is added on Registration
- Enter desired Tiers
- **Note:** The system was designed to handle small tier names, so try and keep the name small.

## ■ County Configuration

- Add the counties you service and assign them to a TIER (All YELLOW fields are required)
- **Copy Fees:** These are the fees that you, most likely, want to charge your customers.
- **County Copy Fees:** These are not required, but can be useful.
- First Page / Other Page pricing: Enter [first page cost] / [other page cost] to designate separate fees for copy orders. Ex: If you enter 1.50/.25 then the customer will be charged 1.50 for the first page and .25 for all other pages in the same copy order.

## ■ Order Type Grouping

- Order Type Grouping is NOT required, but it is very useful if you process differing types of orders. Ex. You could setup a group for processing Property Searches and a group for processing Criminal Searches.
- Try to think of these as departments in your organization.



## ■ Order Type Configuration

- Add the order types that you offer (*i.e.* 2 Owner Search, Criminal Background Checks)
- Enter an Order Type name and an Abbreviation for reporting purposes
- Select a Grouping, if there are any available.
- Set a Base Price for the Order Type for Each Tier you defined earlier
- If a specific order type requires recording information - Select the appropriate check box

## ■ Billing Terms (*Payment terms you give your customers*)

- Net 30, Net 60 and Due on Receipt are defaulted during registration
- Add any desired Billing Terms
- You will have to assign one of the billing terms to the clients you add

## ■ Billing Types (*How often you want to bill your customers*)

- Add your desired billing types *i.e.* Monthly, Weekly or Upon Completion
- If you want an invoice generated when the order's status is set to completed, then select the invoice upon completion check box
- You will have to assign one of the billing types to the clients

## ■ Instrument Types

- Add any desired instrument types which can be selected for recordings

## ■ Copy Types

- Add any desired copy types that can be required for an order

## ■ General Site Configuration

- Several Options and Parameters for site use
- Enter you invoice header information

## ■ FAQ (*Optional*)

- Define a list of questions and answers that can be viewed by your client and vendor

## ■ CLIENT SETUP

- Add Clients
- You have to ability to set custom pricing for each individual client



## ■ VENDOR SETUP

- Add Vendors
- If you set a Vendor as the default vendor they will automatically be assigned every order entered into the system
- Add order types they handle, counties they cover and the fees associated with each vendor. **IMPORTANT**

**THAT'S ALL!** You are now ready to start entering orders and using the system!

Go here to learn more:

[www.questxpress.com](http://www.questxpress.com)

Or call a QuestXpress Representative  
at Integrated Imaging:

**888.922.3669**