

# 2011 CLIPxe Pro Enhancements v.7.0.4055

We have added a lot of great new features to CLIPxe and thought that they could really help you create more efficient systems in your company.

This manual will give you information about what has changed and how to use the new features. If you have questions please let us know, the email address is: [Support@clip.com](mailto:Support@clip.com)

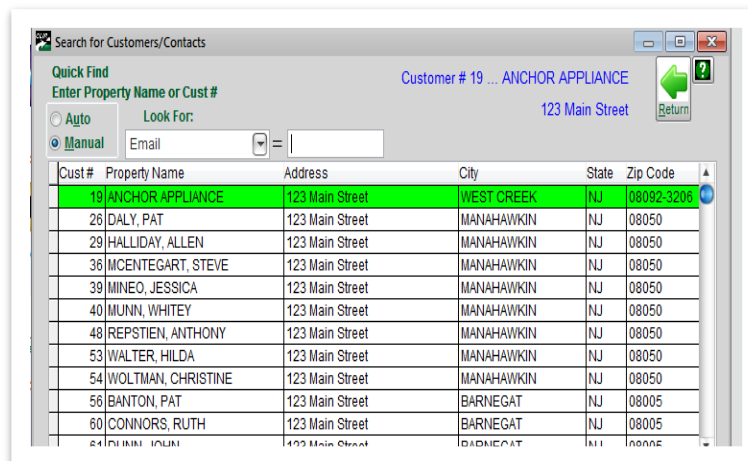
## Table of Contents

File Maintenance .....	2
Programs and Rounds .....	3
Adding Rounds to the work bank from the Customer Screen .....	3
Default Chemicals.....	4
Added Summary Sheet for Programs and Rounds.....	5
Added work projections report for Programs and Rounds .....	5
Marketing Messages.....	6
Suspend Printing for overdue Rounds .....	7
Customer Fuel Surcharges .....	8
CMS .....	10
Credit Cards .....	12
Record Work options.....	14
Added ability to use multiple lawn conditions.....	15
Materials in Jobs .....	16
Other Features .....	19

## File Maintenance

### Ability to search for customer by email

1. To search for a customer by email go to Customer list,
2. Then Choose the manual option,
3. Then select the email option from the list. Type in the Email and click the enter key on your keyboard.



## Programs and Rounds

### Adding Rounds to the work bank from the Customer Screen

We added this feature to allow you to quickly add a round to the work bank without printing out the invoice for that round. This is useful when you have a customer that asked you to do the round while the guys were out and after you had printed your drivers reports and invoices.

To do this go to:

1. Customer list,
2. Click on a customer,
3. Click on the programs tab,
4. Click on a round,
5. Then click on the “Add round to Work Bank.”
  - Now you will be able to find the round in the record work screen.

The screenshot shows a software interface with a tabbed menu at the top: Details, Billing, Notes, Materials, LinkCodes, and Add-Ons. The main content area displays the details for a round named "Soil Test (Only)".

Fields and values shown:

- Name: Soil Test (Only)
- Number: 6003
- Do?: A01 Active
- Last: 04/07/11
- Cat.:
- SubCat.:
- Type: RD2
- Crew: 1
- Area: 1,235
- Route #: 1
- Map Loc.: 1
- Estimate Code: [dropdown menu]
- One Time only:
- Hold Till:
- Include in Estimate:

A button labeled "Add Round to Work Bank" is visible on the right side of the form.

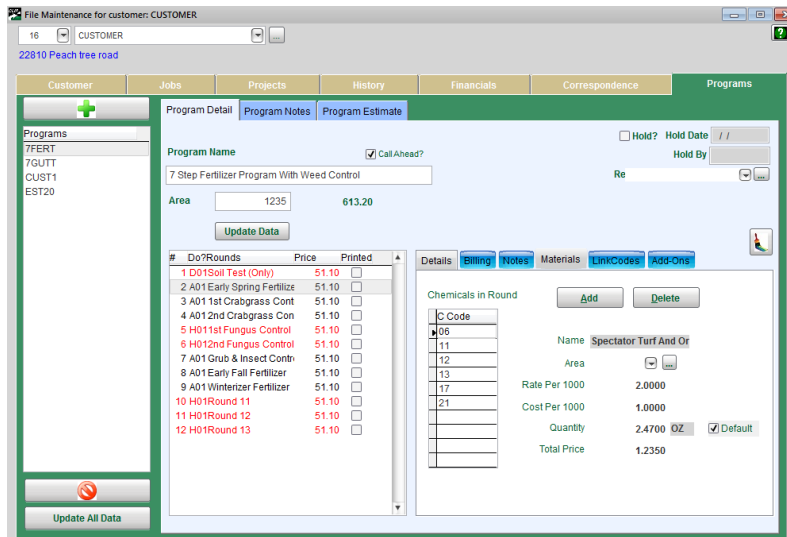
## Default Chemicals

Added the ability to keep track of a “default” chemical

This will give you the ability to select a set of customers and know the total quantity of the default chemical (primary chemical) for the round.

To use default chemicals you can go to:

1. A Customers account,
2. Click on the Programs tab
3. Choose a round and click on the Materials tab
4. Select the default checkbox for the chemical that you would like to use as the “Default” (some people would call this the primary) chemical.



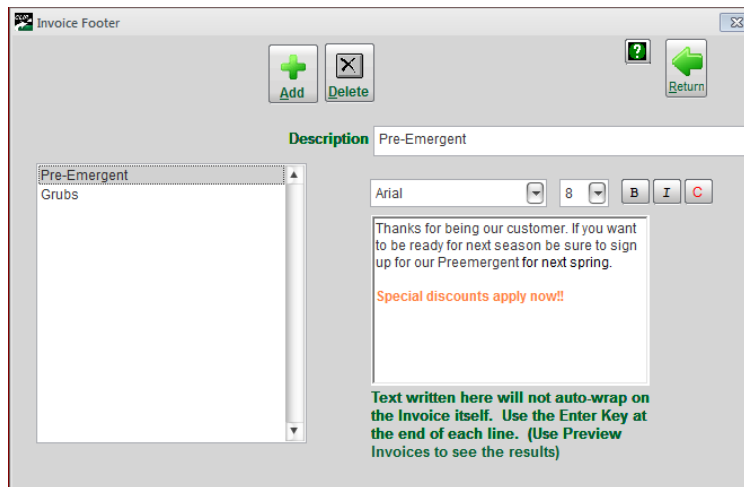
You can find the quantity for the default chemical for the rounds (see screenshot below) when you pull them up from Programs and Rounds invoices.



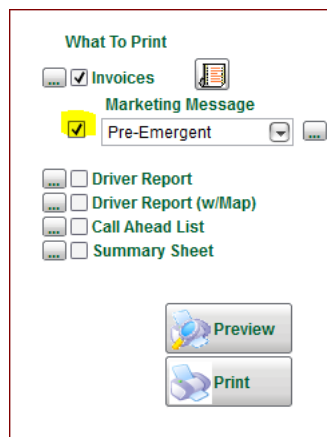
## Marketing Messages

### Added Marketing message to Rounds Invoices

1. Go to programs/rounds invoices
2. Choose customer and round etc.
3. Under print options tab click on the 3 dots next to marketing message.

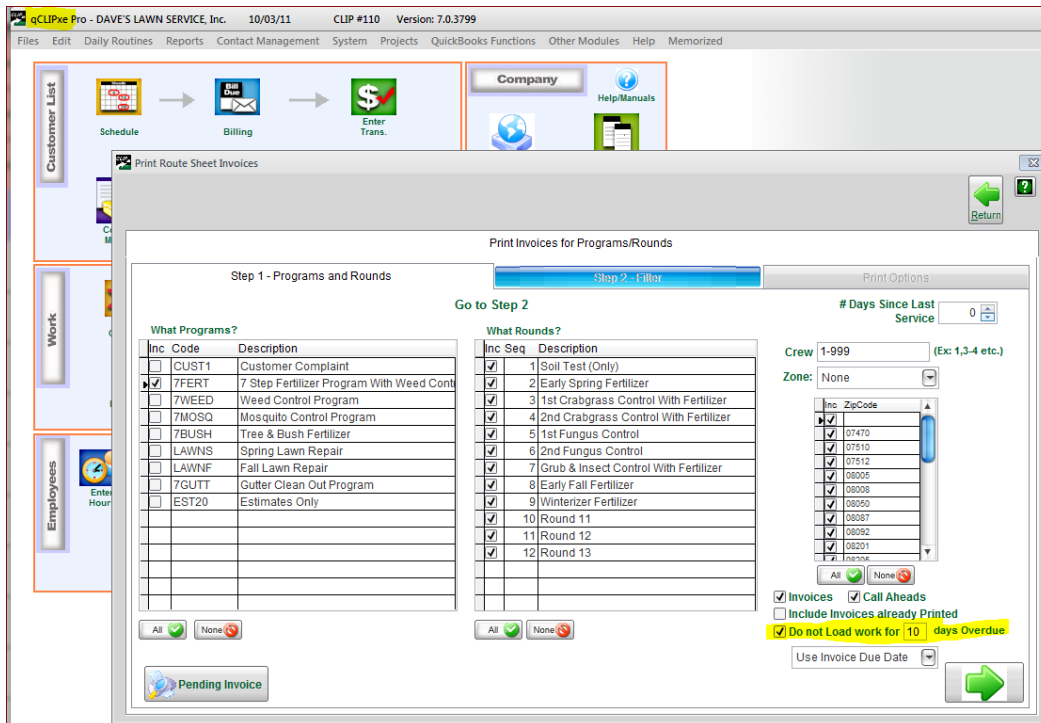


4. Enter in the message.
5. Check the box to have it print on the invoice.



## Suspend Printing for overdue Rounds

Added the ability in QuickBooks versions (qCLIPxe) to not load rounds that are x number of days overdue, based on the invoice date or customer terms in QuickBooks.



1. To use the feature go to Rounds invoices, then Check the box “Do not load work for \_\_ Days overdue.”
2. If you want to use the invoice due date from QuickBooks use the “use invoice due date” option.
3. Otherwise if you want QuickBooks to use the settings that you have setup for your customers in QuickBooks use the “Use Cust. Terms to Calculate” option.

**Make sure that you have QuickBooks open first!!**

## Customer Fuel Surcharges

Added functions to bill specific customers surcharges based on percentages, dollar amounts, contract amounts, contract, or non-contract jobs for a specific time period.

1. To get to the Billing surcharge screen go to the system menu,
2. Click on Financials
3. Click on the Fuel Surcharge option.

The screenshot shows a software window titled "Setup Fuel Surcharge". The main section is titled "Setup Fuel Surcharge" and contains the following fields: "Post Date" (09/15/11), "Fee" (2.00), "Surcharge Description" (Fuel surcharge for this billing period), "Item" (Design), and "Class" (Design). To the right of this section is a "Return" button and a help icon. Below the main section are two sub-sections: "Jobs" and "Installments". The "Jobs" section has "For Jobs Billed" dates (08/16/11 to 09/15/11), an "Apply to contract jobs" checkbox, and a "Generate SurCharges For Jobs" button. The "Installments" section has a "Month to Bill for" dropdown (Jan) and a "Last Processed Date" (04/06/2011), with a "Generate SurCharges For Installments" button. There are also two paragraphs of instructional text at the bottom of the window.

1. The surcharges will only be charged to customers that have the "Surcharge?" option set to yes.
2. To charge a surcharge for a customer put a Y in that box for Yes (to get to this screen click on the customer list and then choose a customer).
3. This option can also be replaced using the global replacement function in CLIPxe to change all customers at one time.

File Maintenance for customer: CUSTOMER

17 CUSTOMER

123 Main Street

Customer Jobs Projects History Financials Correspondence Programs

Customer More Contacts More Phone #s Property Info Notes Custom Fields

Customer Number 17  Customer  Vendor  Estimate  Employee

Property Name CUSTOMER ID:

Address 123 Main Street

City Ijamsville,

State/Zip MD 08050 Tax Id NV  City Code

QB\_ID SCHWING, MAT

Billing Name CUSTOMER  Master Customer

Greeting DEAR CUSTOMER Work (555) 555-5555

C/O Home (555) 555-5555

Address 123 Main Street Fax (555) 555-5555

City/St/Zip Ijamsville, md 08050 Cell (555) 555-5555

E-Mail Address support@clip.com   Email Invoice  Do Not Print Invoice

Balance   R/C Code R

Credit Limit 250.00 Customer Type

GATE 0 Surcharge? Y

cust num  Invoice or Statement Charges? I

Last Active Year 2003 Customer Category Ocean Acres  How They Heard About Us 2007

Customer Since 06/18/02  Source

Last Activity Date 05/13/11  Reason

Status ACTIVE

Account Number





## Credit Cards

Integration with Blue pay for credit card processing

Operator: GLENNZ **Find Customer**

Customer # 50  
Property Name: ZIOR, GLENN  
Property Address: 808 Festival Ave Mount Airy  
Billing Address: 808 Festival Ave Mount Airy, MD

**Enter Transaction Information**

#	Name	Code

Date: 06/16/10 Credit: 1200 Debit: 1100  
Code: C=Cash/Credit Charge Card? N  
Amount: 1.00  
Descr:

Accounts Receivable  
Damascus Community Bank

Get Transaction Amount From: Last Billing, History

For better transaction rates,

**Process the Charge**

Credit Card Number: 0000000000004642  
Expiration Date: 10/12  
Name on Card: GLENN  
Card Description: MY CREDIT CARDSVLV/ALKVKMVMV#  
CID:

Voice Authorization  
Code:  Date: / /

Continue

Enter in new credit cards directly from CLIP and have them synchronize with Blue Pay.

The image shows a web browser window titled "BluePay Customer Details". The page has a grey background and a blue title bar. At the top right, there is a green arrow icon pointing left with the word "Return" below it, and a small question mark icon. The form fields are as follows:

- Customer #:** 50
- Customer Name:** ZIOR, GLENN
- Address:** 808 Festival Ave
- City:** Mount Airy
- State:** MD
- Zip:** 217545
- Card Type:** VISA (dropdown menu)
- Name on Card:** [Empty text box]
- Credit Card #:** - - - [Empty text box]
- CVV2:** [Empty text box]
- Card Expiration Date:** [Empty text box] (MMYY)
- Description:** [Empty text box]

At the bottom center of the form is a button labeled "Process".

You can access reports directly from Blue Pay's website.

## Record Work options

To see the new options click the record button on your main screen, then click on the options button.

Record Work Subtotals - Record Options

**Record Work Options**

Record Times For All Jobs

Record Travel Time

Auto Travel Time

Re-Calc Travel Time

Enter Employee Info

Use Last crew config recorded

Show Lawn and weather conditions

Add notes below to Invoice Note when marked as Y

**Report Options**

Detailed Work Done Report

Print by Clock Time

Print Each Crew on a Separate Page

**Materials Recording Options**

Calculate Material/Chemical Cost by :

Unit Cost

Unit Price

Add materials price to Charge for Time & Material Jobs

Return

1. Added new options to add a note on all jobs as they are recorded (“Add notes below to invoice notes when marked as Y”)
2. Added ability to calculate materials costs by price instead of Cost.
3. Added ability to add materials price to the Charge for Time and Materials jobs.

## Added ability to use multiple lawn conditions

When recording jobs you can add multiple lawn conditions

1. Go to Record
2. Click on “mark work as done”
3. Click on the lawn condition button
4. Add/delete the lawn conditions that applied when doing the job.

Specific Info. on Job

Customer: MIGLIACCIO, DIANE Job # 1021-6009  
123 Main Street Part of contract.

Quick Record  
Description: Grub & Insect Control With Fertilizer Job Change

Data Entry

Lawn Condition	Quantity
Needs Water	0.00
Broken Sprinkler head	0.00
Heavy Thatch	N

Add Remove

Lawn Condition	Quantity
Needs Water	0.00
Broken Sprinkler head	24.48
Heavy Thatch	4.22
Cutting too short	0.00
Dog waste	0.00

Save Revert Return

.1 = 6 minutes  
.25 = 15 minutes  
.50 = 30 minutes  
.75 = 45 minutes

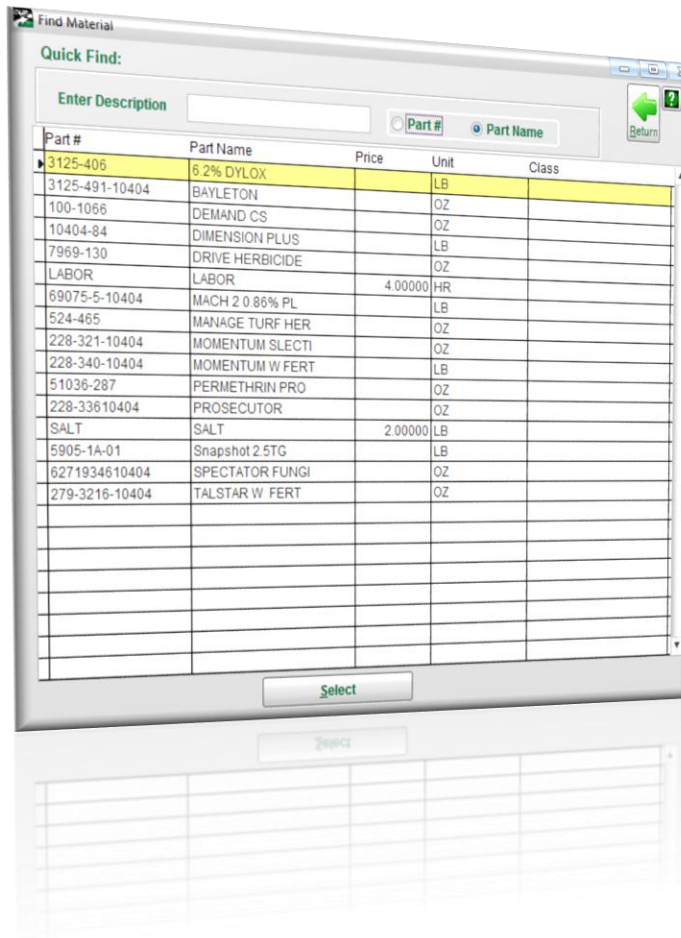
Wind Speed (MPH): 65 Weather Condition: PCloudy  
Wind Direction: W Ambient Temperature: 27  
Lawn Condition: Lawn Condition Default

Chemical Tracking

Enter 0 for quantity used if you did not use the material/chemicals that you assigned to this job.

***If this is your first time using lawn conditions don't forget to turn on Lawn conditions under the options menu for record work (click on record button, then click on options).***





Added Job Materials report (search for materials by part, crew, customers, jobs, and dates).

To get to this report go to

1. Reports menu
2. Click on Job reports
3. Click on the Job materials report.

**Job Materials Report**

Crew Range:  (Examples:1,5,3-4 etc.)

For Customers from:  to

For Job numbers:  (Examples:1,5,3-4 etc.)

Part Name:

Start Date:

Stop Date:

[Return](#) [Memo rize](#)

[Preview/Print](#)

CLIPxe Pro - DAVE'S LAWN SERVICE, Inc. 09/15/11 CLIP #110 Version: 7.0.3753

Files Edit Daily Routines Reports Contact Management System Billing Projects Special Invoices Other Modules Memorized Help

Report Preview - material\_repo.frx

100%

**Job Materials Report**

Page No. # 1

Part Number	Part Name	Quantity	Unit	Date	County Code	Name	Property Address	City	Zip C
3125-406	6.2% D'YLOX	1.0000	LB	09/13/11	MO	CUSTOMER	22810 Peach tree road	boyds	208
524-465	MANAGE TURF...	1.0000	OZ	09/13/11	MO	CUSTOMER	22810 Peach tree road	boyds	208
100-1066	DEMAND CS	1.0000	OZ	09/13/11	MO	CUSTOMER	22810 Peach tree road	boyds	208

## ***Other Features***

Added function to view number of days overdue for rounds  
Added ability to add and adjust chemicals globally  
Added Rounds Future Usage report  
Added Programs by Customer report  
Added the Rounds Square Footage Report  
Added current rounds history report for Programs and Rounds  
Added Programs and Rounds Summary Sheet  
Added ability to sort chemicals by name or number  
Added ability to push chemical area to all customers for a specific round  
Added ability to manage chemicals from the Pattern Programs screen  
Added ability to color code fields for Programs and Rounds  
Added ability to push chemical area to all customers for a specific round  
Added ability to manage chemicals from the Pattern Programs screen  
Adjusted the resolutions on the Customer history report  
Added job Materials report (search for materials by part, crew, customers, jobs, and dates).

***We also added some other Programs and Rounds reports so be sure to check out your reports section!! If you have any questions please let us know.***