

CLIP is a very powerful information management program that handles scheduling, routing, billing and job costing with ease. *CLIP* was initially programmed for the Lawn Maintenance Industry but has been continually enhanced since 1988 to cover more and more industries and applications that have a need for a comprehensive scheduling and billing program.

The general flow of information for a Chemical Applicator using *CLIP* is to enter the customer base into the program and then add the jobs for each customer. After the jobs are added, route sheet invoices can be printed either with or without dates allowing you to pass them on to the technicians for completion. The Invoices will be printed in Geographical Routing order with two (or more) copies for each job. The technician will fill in the pertinent information and leave one copy with the customer and bring one back to the office. The office will record the job as completed and wait for payment. When payment is received, the payment is applied against the account and *CLIP* will keep track of any overdue amounts. Statements can be printed at the end of the month only for the customers that have not paid off of their invoices.

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Step 1 - Setting up the Pattern Customer

CLIP makes extensive use of “Patterns” to set up your customers and their jobs. By using patterns you will maintain consistency, save yourself typing time and avoid common mistakes.

A pattern customer is a customer record that can be used to fill in some of the fields that need to be filled in when a customer is added to the system. The first pattern customer should also have all the jobs or services that are provided to your clients. By using the pattern customer and jobs, you will save yourself typing and maintain a higher level of consistency in your data base. This will make the retrieval of information much easier in the long run.

The first customer is already set up as a Pattern customer and it is named Pattern. To access this record, open **CLIP**, pull down the Files Menu and press the File Maintenance option. You should see the following screen:

CLIP Pro -
Files Edit Daily Routines Reports System Billing Projects Special Invoices Other Modules Help

CLIP File Maintenance - Multi-User Unlimited

Customer Number 1 Notes Letters Contacts **Account Number**

Property Name PATTERN
Address
City Your City
State/Zip MI 4810 Tax Id MI City Code

Billing Name
Greeting DEAR
C/O
Address
City/St/Zip Your City, US 4810

Work (313) Fax () -
Home (313) Pager () -

Credit Limit 1500.00 R/C Code R Type More #s
Custom Alpha M Contract Customer? N
Custom Num 0.00 Finance Charge? Y
Word P. Code Billing Type: Balance Forward

Customer Vendor Estimate

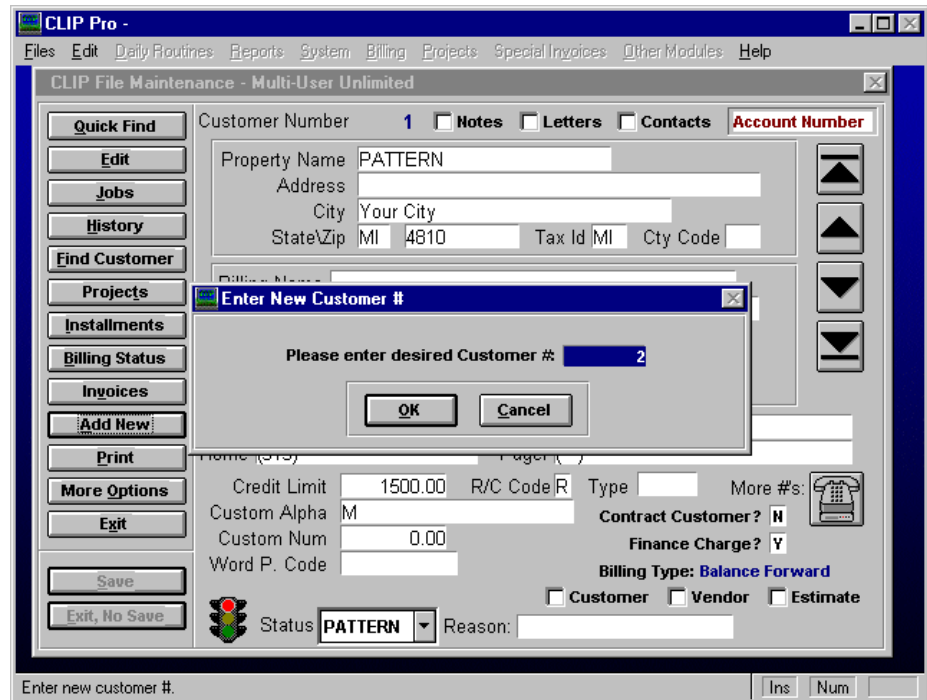
Status PATTERN Reason:

Select action to perform. Press PgUp to return to Quick Search. Ins Num

Notice that only some of the fields are filled in. The fields that are filled in will be our “defaults” for all new customers. You can set up various patterns, one for residential, one for commercial, one for each town you work in...etc. You should edit this customer or create a new one that will have your information in it. Let’s create a new pattern.

Creating a new pattern customer.

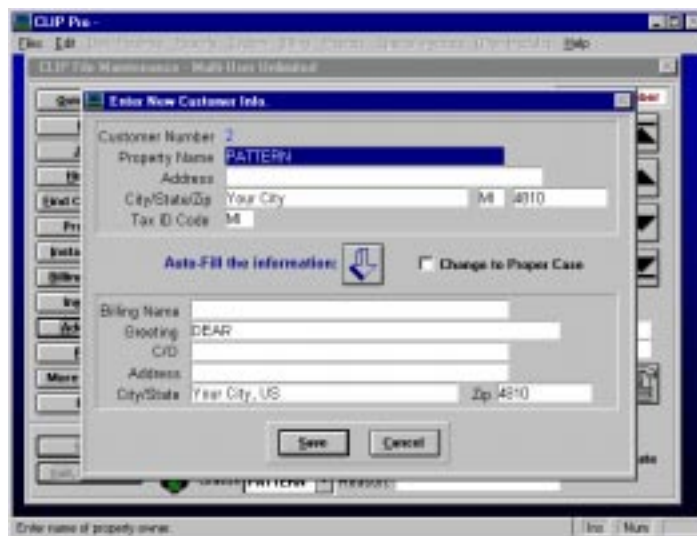
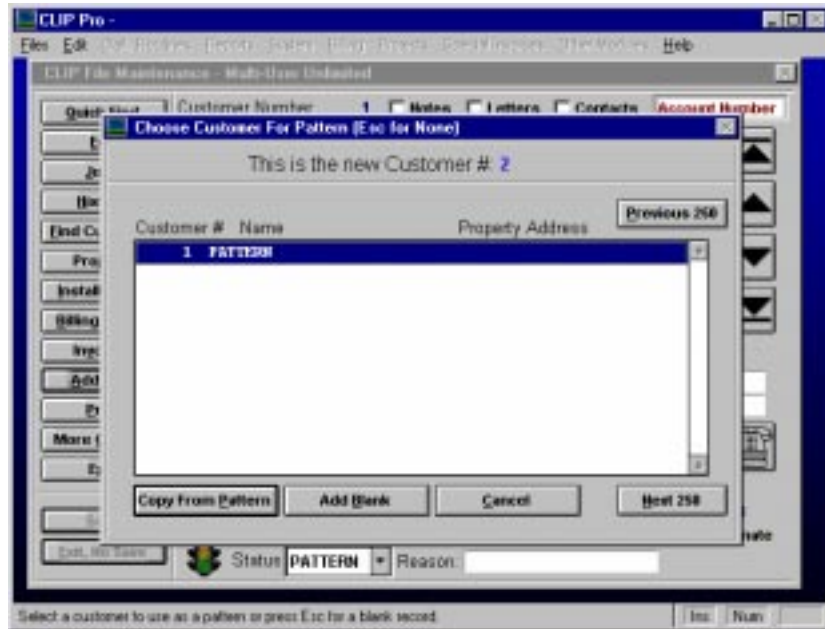
Press the Add New button to begin the process.



The screenshot displays the CLIP Pro software interface. The main window is titled "CLIP File Maintenance - Multi-User Unlimited". On the left side, there is a vertical menu with buttons for "Quick Find", "Edit", "Jobs", "History", "Find Customer", "Projects", "Installments", "Billing Status", "Invoices", "Add New", "Print", "More Options", "Exit", "Save", and "Exit, No Save". The "Add New" button is highlighted. The main area contains a form for entering customer information. The "Customer Number" field is set to "1". The "Property Name" is "PATTERN". The "City" is "Your City". The "State/Zip" is "MI 4810". The "Tax Id MI" and "City Code" fields are empty. A dialog box titled "Enter New Customer #" is open in the foreground, prompting the user to "Please enter desired Customer #" with the number "2" entered in the input field. The dialog box has "OK" and "Cancel" buttons. Below the dialog box, the form continues with fields for "Credit Limit" (1500.00), "R/C Code/R" (Type), "Contract Customer?" (N), "Finance Charge?" (Y), "Billing Type: Balance Forward", and "Status" (PATTERN). The "Status" field has a dropdown menu and a "Reason:" field next to it. The bottom of the window has a status bar with "Enter new customer #." and "Ins Num" buttons.

You will be asked for the desired customer number. Just press the OK button to proceed.

Next, **CLIP** asks if you want to copy from pattern. Press the Copy from Pattern button to get all the information from customer # 1 into your new customer.

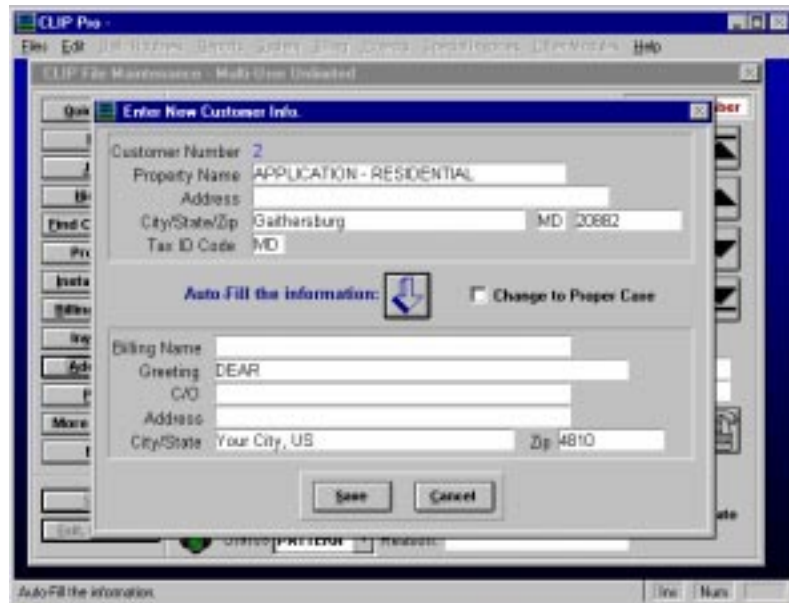


Now change the name to "APPLICATION - RESIDENTIAL"

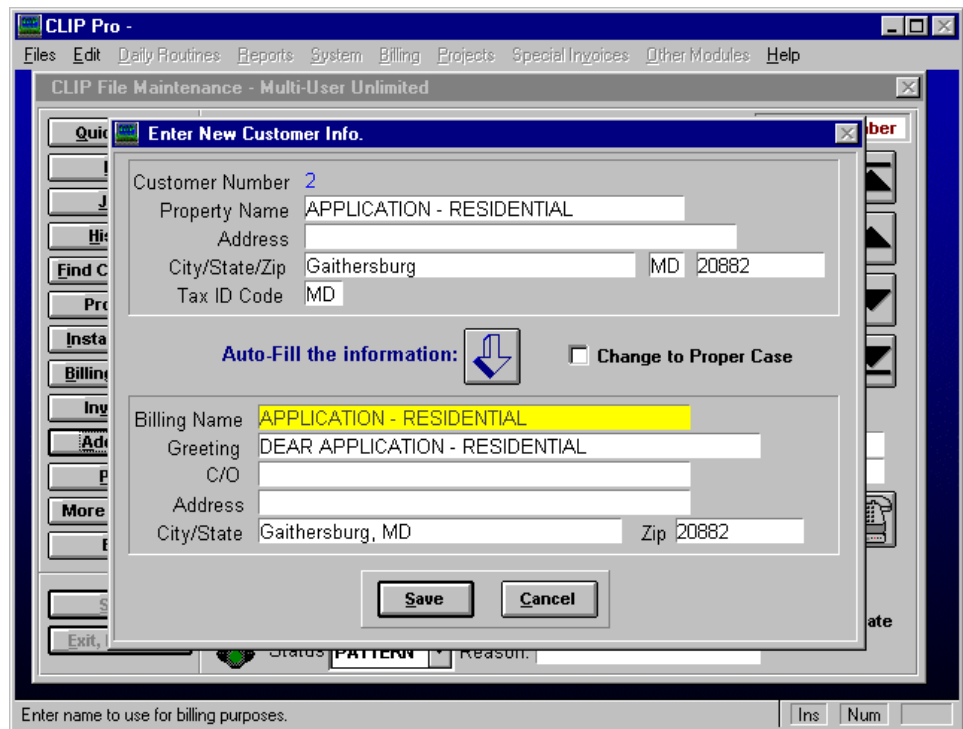
This will be our pattern for a residential Chemical application.

Put your City/State/Zip code information that will be most common for the majority of your clients.

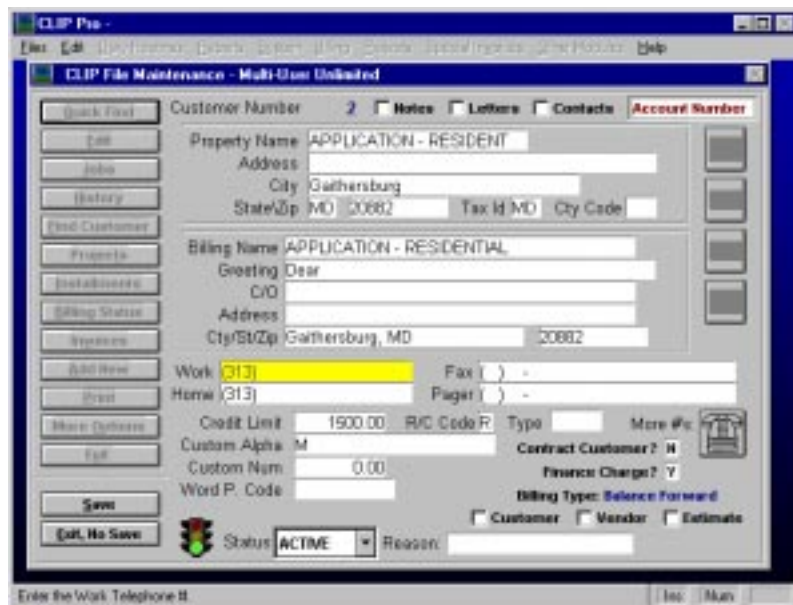
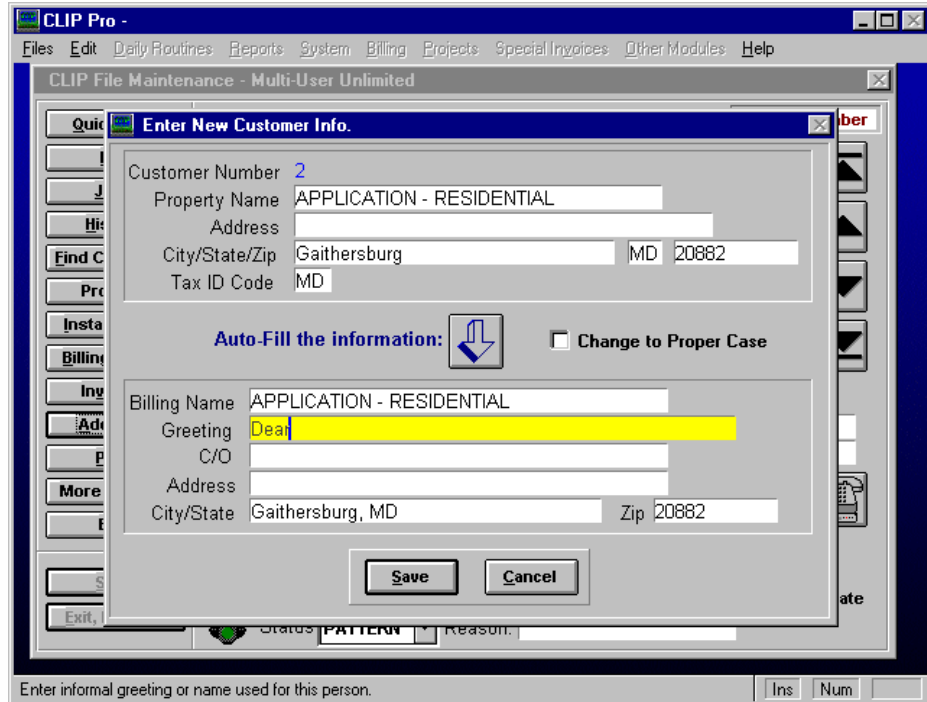
Press the AutoFill button to get **CLIP** to fill in your Billing name and address with the Property name and address.



Change the Greeting back to just "Dear".



Now press the “Save” button to save your work.

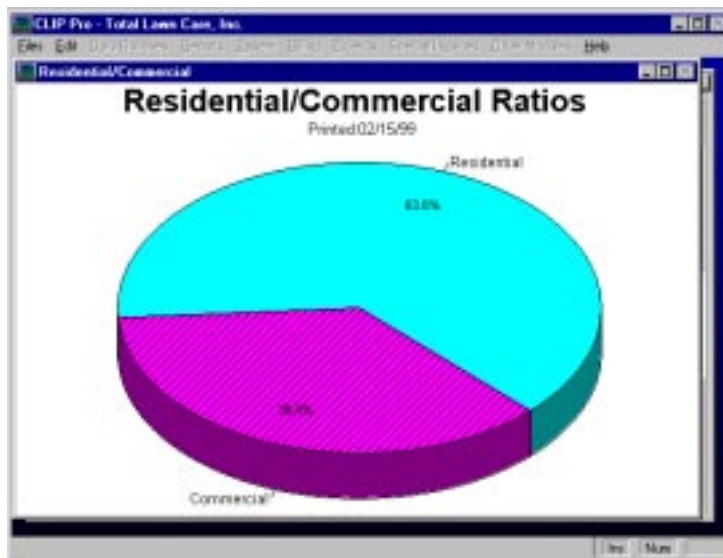


Enter the area code that you do most of your work in.

Enter the Credit Limit that will be most common to your customers. The credit limit tells **CLIP** when to advise you that a customer will owe you more than his credit limit if you were to perform the scheduled job for the customer. Some customers like to use this to advise them immediately if the first application has

not been paid for. If the application price is \$25.00, by placing a 25 in the credit limit, **CLIP** will let you know before you do the second application that the first has not been paid yet. There are other ways to get this knowledge as well, but this is one way that people use.

The R/C code is used mainly to differentiate between Residential and Commercial clients. If you only service either residential or commercial clients, you can use it to differentiate between any two designations you wish. A pet sitting company uses it to determine whether the customer has only cats (C) or dogs as well (R = Ruff!). A maintenance company uses it to designate whether the customer has a fence (Confined) or not (Range). You can see ratios of your R/C codes on Company Status and other reports.



The Type field is a place you can enter a code that tells you what type of customer this is. This field is not used by **CLIP** directly and is just there to allow you to print out marketing letters and material of get reports or transfer to Excel and get charts out. Some examples of Customer Types could be

FULL Full Service

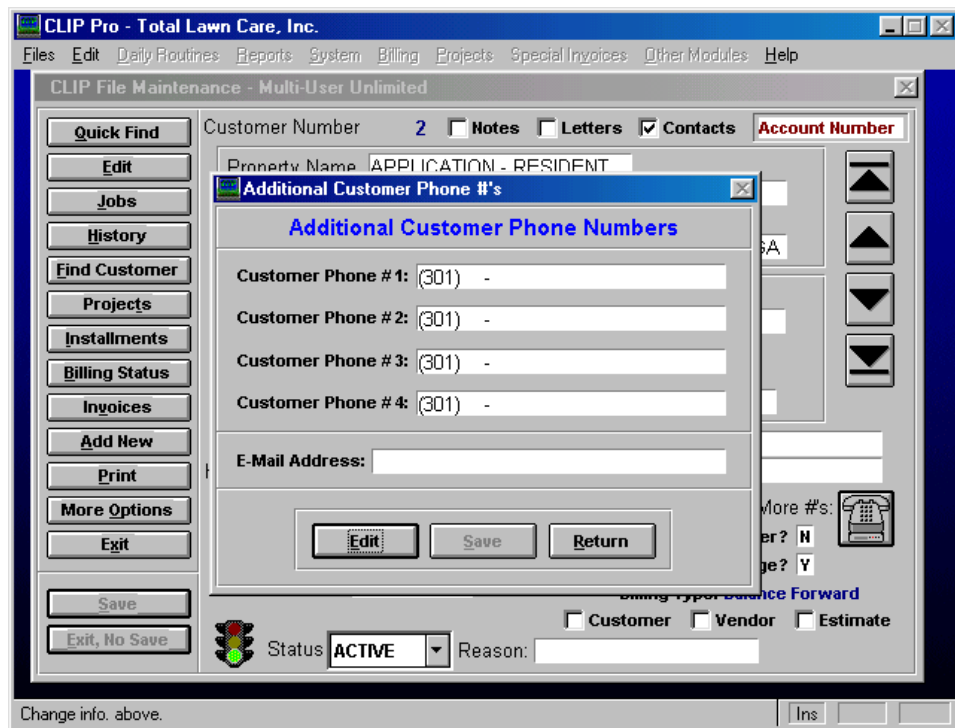
DEL Deluxe Plan

BUD Budget Plan

Start thinking about how you will divide your customers up into these categories that will be of use to you later on.

Custom Alpha, Custom Numbers and Word Processing Code. We have provided you with three fields for you to use for your convenience. **CLIP** does not use these fields for anything in particular, we want you do use them to enhance your coding and division of your customer data base. You can leave them blank for now and address them later if you like.

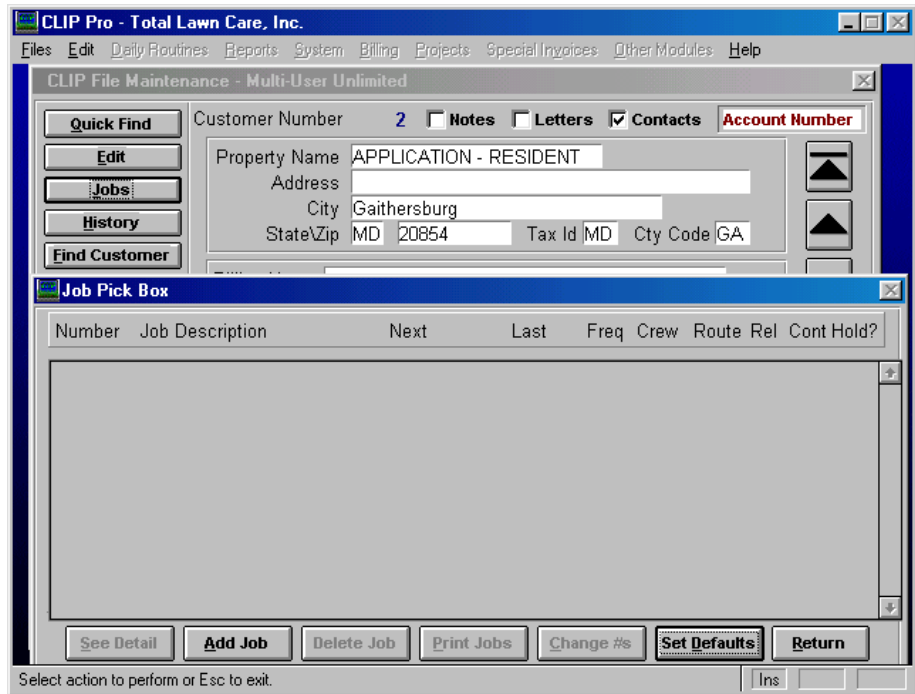
By pressing the More Phone Numbers button you will be able to fill in more phone numbers. Remember that since we are just setting up the pattern customer, all we want to do now is enter the area codes so that data entry will be easier later on.



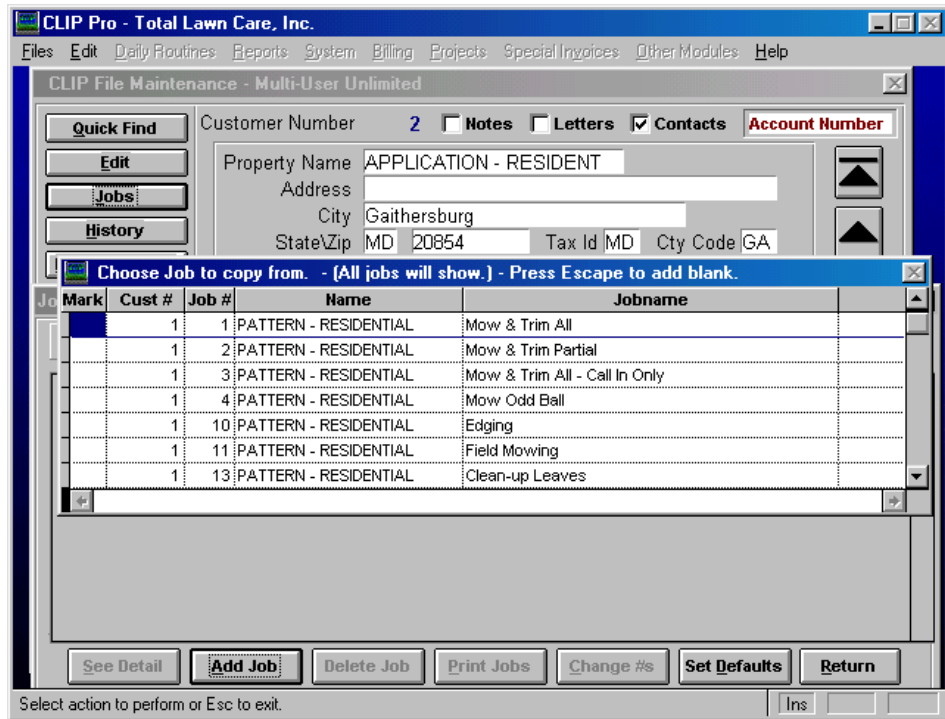
After you edit this, press the save button to save your changes.

Step 2 - Set up the Jobs for your Pattern Customer

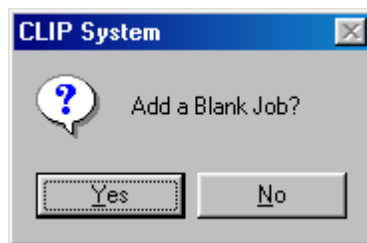
Enter the jobs that will be the basis of your services. To enter the jobs for the services that your company performs, press the jobs button, the job pick box will be blank.



Press the Add Job button to start entering pattern jobs for your company.



At this point **CLIP** is asking us if we want to copy from a pattern job that already exists in our data base. Since we want to set up our company as different from what comes shipped with **CLIP Pro**, we will hit the escape key to create our own set of services.



When **CLIP** asks you if you want to add a blank job, press the Yes.

The screenshot displays the 'CLIP Pro - Total Lawn Care, Inc.' software window. The 'Job Details' tab is active, showing a form for entering job information. The 'Job Number' is set to 1, and the 'Job Description' is 'New Job'. There are checkboxes for 'Invoice Notes' and 'Internal Job Notes'. The 'Custom Fields' section includes 'Job Type', 'Custom Letters', and 'Custom Numbers' (set to 0.00). The 'Routing Information' section includes 'Crew Number' (1), 'Routing Sequence' (10), and 'Map Location'. On the right, there are several numerical fields: 'Min. Jobs per Year' (0), 'Max' (999), 'Done to Date' (0), 'Charge per Job' (0.00), 'Man Hour Rating' (0.00), 'Charge Over Max' (0.00), 'Charge per Hour' (0.00), 'Job Area' (0), 'Tax Type (D,M,L)' (D), and 'Average Time' (0.00). Below these fields, there are 'Credit: 41014' and 'Debit: 11380' labels, along with 'Sales Maintenance' and 'Accounts Receivable' links. At the bottom, there is a 'Route Sheet Notes' field and a row of buttons: 'Edit', 'Print', 'History', 'Save', 'Notes', 'Chemicals', and 'Return'. The status bar at the bottom indicates 'Select action to perform or Esc to exit.'

We are now presented with a blank job ready for us to start modifying to make it the way we want it.

Press the Edit key to allow you to change the information in the fields.

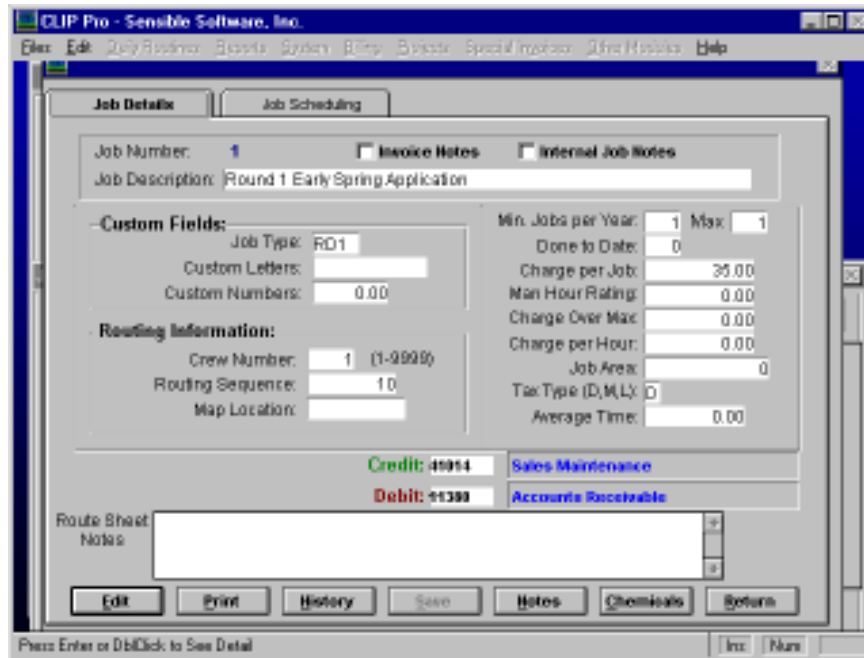
The Job description should be something descriptive to you, your employees and your customers. Entering "Round 1 Early Spring Application" is an example for the description for our first job.

The Job Type should have a specific, unique identifier for this job. All Round Ones will have this in the Job type. By doing this we will be able to work with these jobs as a group, changing the dates or other fields that we need to change in mass.

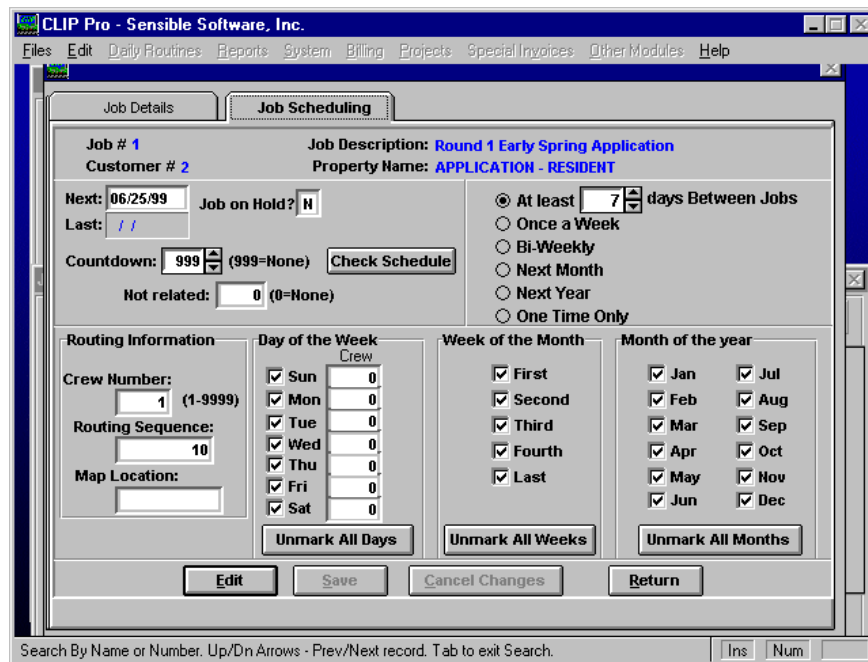
For now, leave custom letters and custom numbers blank. Eventually you will find a use for it, but it is just an extra field allowing you to store information that we have not provided you with a place. Most people leave these fields blank until they find a particular need.

We can leave our crew number, Routing Sequence and Map Location alone for now because we are just setting up a pattern or template

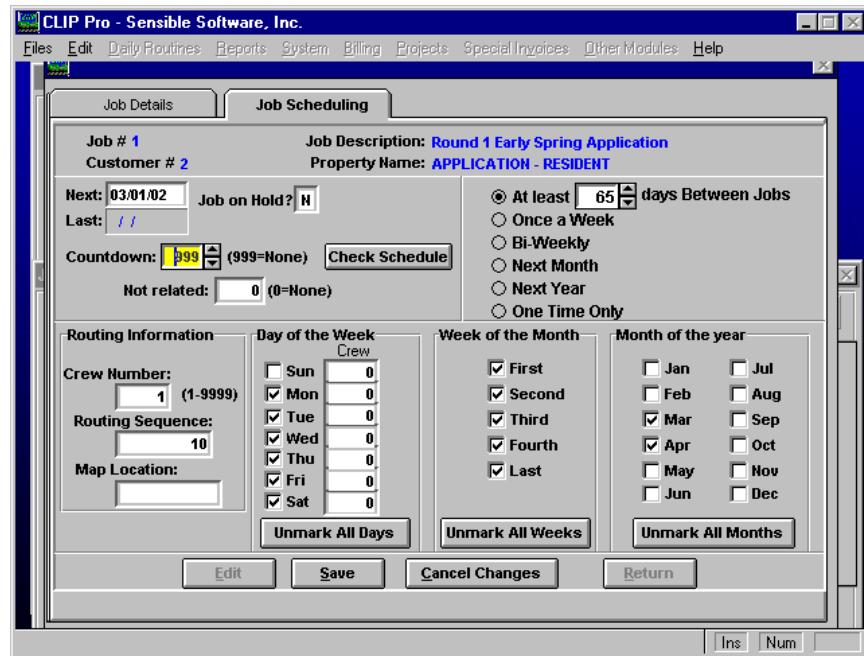
Your Job Details Screen should look like this:



Now press the "Job Scheduling" tab to set up the schedule



Let change the “Next Scheduled Visit” to early March.



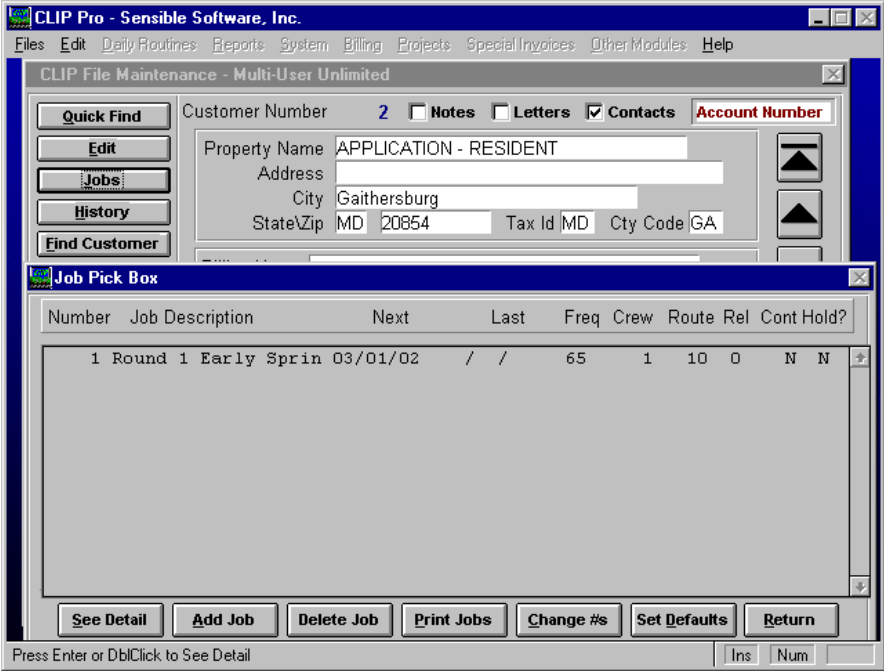
Notice the changes that we have made and the reasons for each:

1. The Next is set for March 1, which will be when all my Round 1 jobs become due.
2. The “Days between jobs” is set to 65 which will push it far enough forward to let the monthly scheduling take over.
3. I have un-checked Sunday as a possible day to work because my company does not work on Sundays.
4. I have left all the weeks of the month as available
5. I have only checked March and April since by the end of April, this job will be very late.

The way this scheduling will work is if the job is done on March 15th, **CLIP** will count 65 days forward which will place in sometime in May, it then checks to see if May is an available month and since it is not, it moves forward to the next available month, ending on March of the next year. Notice that I could also have checked off the “Next Year” option and accomplished the same thing.

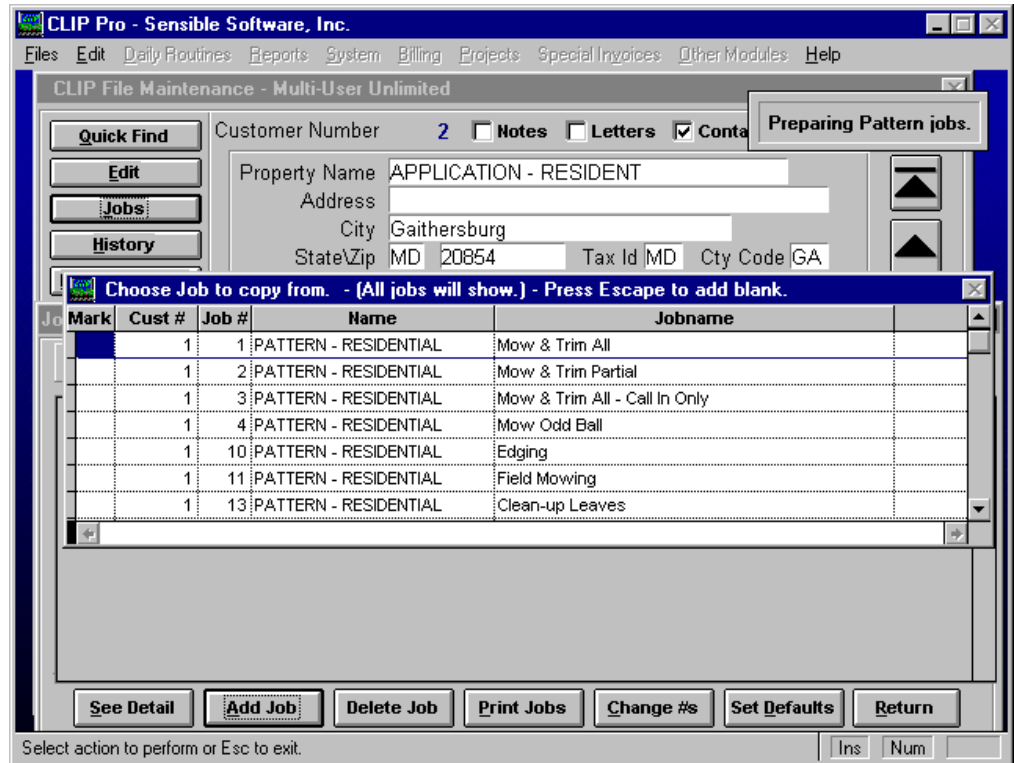
You will find that there are usually a few different ways to accomplish the same thing in **CLIP**. This is due to the fact that there are so many different types of businesses using **CLIP** that we have to maintain a lot of flexibility in our program.

Once these changes are made, press the “Save” button to save your changes. Press the “Return” button and you should see the Job Pick box that looks like this:



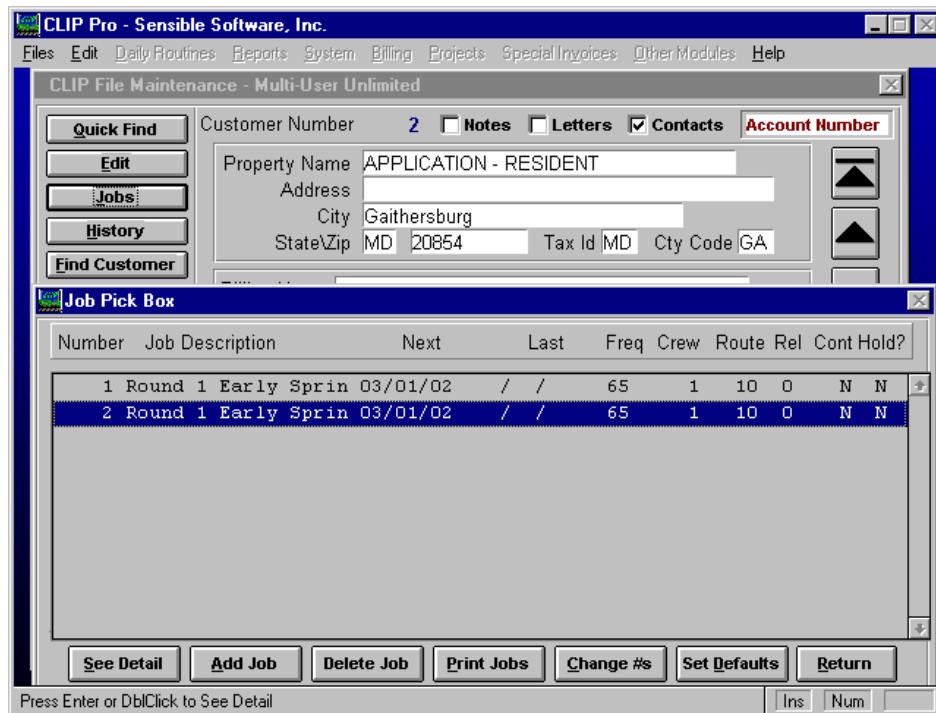
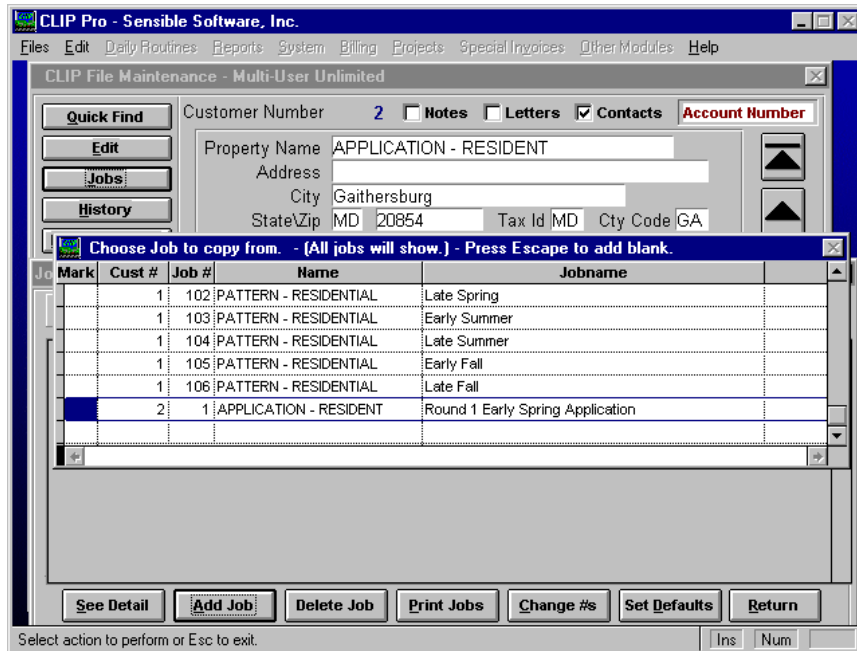
Now we need to enter the other rounds.

Press the "Add Job" button to add the next Round.



Press the down arrow to go down to Customer # 2 and the job we just entered.

Press the space bar on your keyboard to mark it for copying, then press the enter key to process it.



Now we need to change this job to a Round 2 job.

Press the “See Detail” button to get to the details for this job, then press the “Edit” button to make the changes.

CLIP Pro - Sensible Software, Inc.

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

Job Details Job Scheduling

Job Number: 2 Invoice Notes Internal Job Notes

Job Description: Round 1 Early Spring Application

Custom Fields:
Job Type: RD1
Custom Letters:
Custom Numbers: 0.00

Routing Information:
Crew Number: 1 (1-9999)
Routing Sequence: 10
Map Location:

Min. Jobs per Year: 1 Max 1
Done to Date: 0
Charge per Job: 35.00
Man Hour Rating: 0.00
Charge Over Max: 0.00
Charge per Hour: 0.00
Job Area: 0
Tax Type (D,M,L): D
Average Time: 0.00

Credit: 41014 Sales Maintenance
Debit: 11380 Accounts Receivable

Route Sheet Notes

Edit Print History Save Notes Cancel Return

This is the job description for this job. Ins Num

Change the name to “Round 2 Late Spring Application” Change the Job Type to RD2

CLIP Pro - Sensible Software, Inc.

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

Job Details Job Scheduling

Job Number: 2 Invoice Notes Internal Job Notes

Job Description: Round 2 Late Spring Application

Custom Fields:
Job Type: RD2
Custom Letters:
Custom Numbers: 0.00

Routing Information:
Crew Number: 1 (1-9999)
Routing Sequence: 10
Map Location:

Min. Jobs per Year: 1 Max 1
Done to Date: 0
Charge per Job: 35.00
Man Hour Rating: 0.00
Charge Over Max: 0.00
Charge per Hour: 0.00
Job Area: 0
Tax Type (D,M,L): D
Average Time: 0.00

Credit: 41014 Sales Maintenance
Debit: 11380 Accounts Receivable

Route Sheet Notes

Edit Print History Save Notes Cancel Return

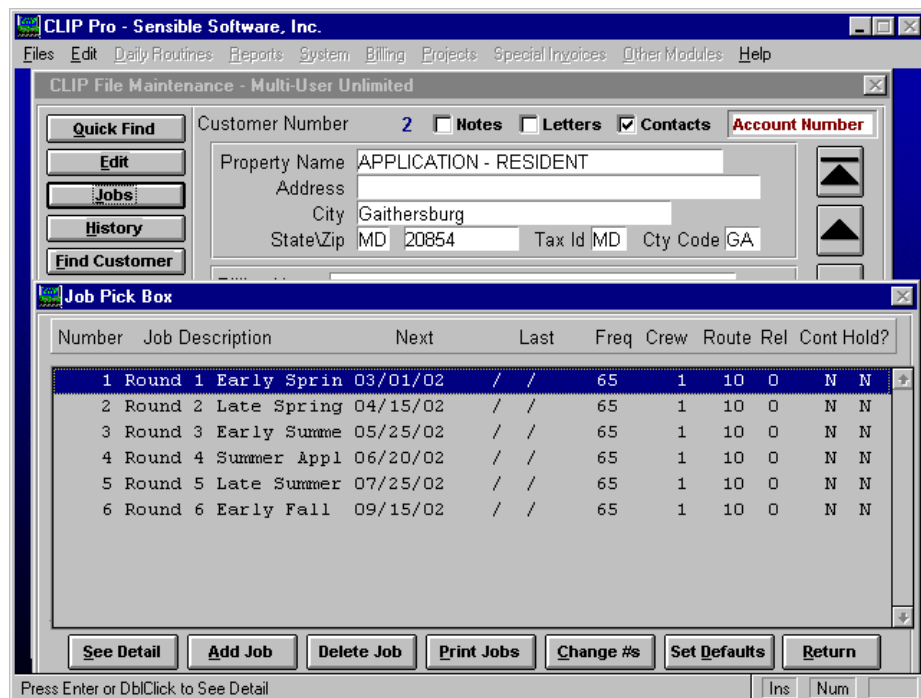
This is the job description for this job. Ins Num

CLIP Pro for Chemical Applicators - 17

Press the Job Scheduling tab and change the Next to April 15th. Change the months to April and May.



Now repeat the process for Rounds 3,4,5. When you are done, you should have the following jobs in your pattern customer # 2.



Make sure that your "Job Type" fields are filled in correctly for each round with an "RD1", "RD2" and so on, we will use these to make sure that a property does not receive two rounds too close together.

Now we are set up to start entering real customers.

Step 3 - Enter the Customer Information

Now that your pattern customer and jobs are entered, we can start entering real customers. You can add a customer in the same way as you just created the new patter customer.

Get to the Customer File Maintenance screen and press the “Add New” button to begin the process.

CLIP Pro - Sensible Software, Inc.

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

CLIP File Maintenance - Multi-User Unlimited

Quick Find Edit Jobs History Find Customer Projects Installments Billing Status Invoices Add New Print More Options Exit Save Exit, No Save

Customer Number 2 Notes Letters Contacts Account Number

Property Name APPLICATION - RESIDENT
Address
City Gaithersburg
State/Zip MD 20854 Tax Id MD City Code GA

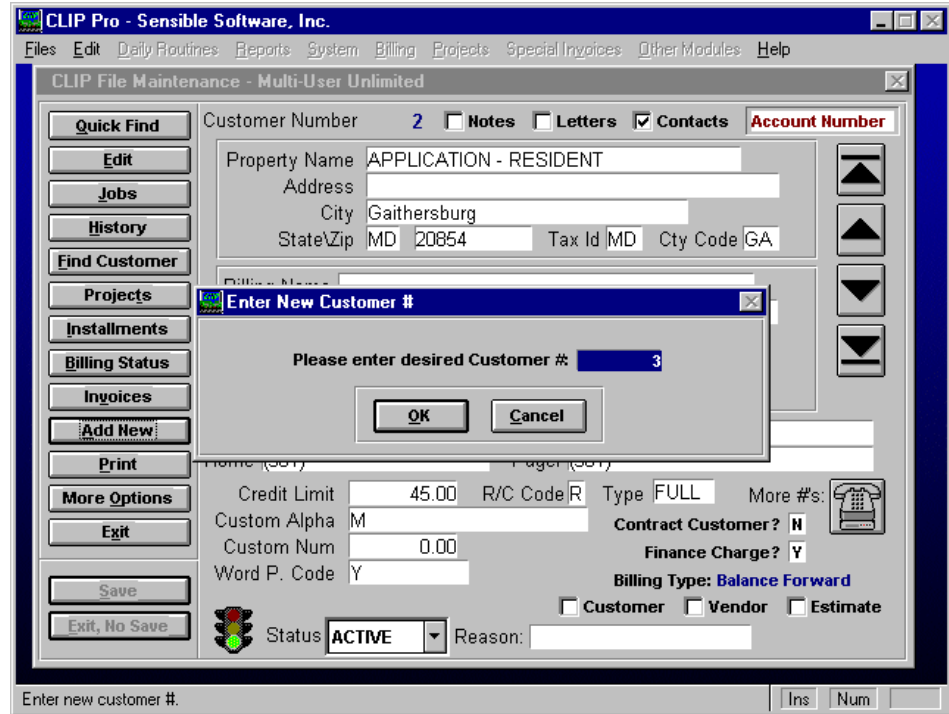
Billing Name
Greeting Dear
C/O
Address
City/St/Zip Gaithersburg, MD 20854

Work (301) Fax (301) -
Home (301) Pager (301) -

Credit Limit 45.00 R/C Code R Type FULL More #s:
Custom Alpha M Contract Customer?
Custom Num 0.00 Finance Charge?
Word P. Code Y Billing Type: Balance Forward
 Customer Vendor Estimate

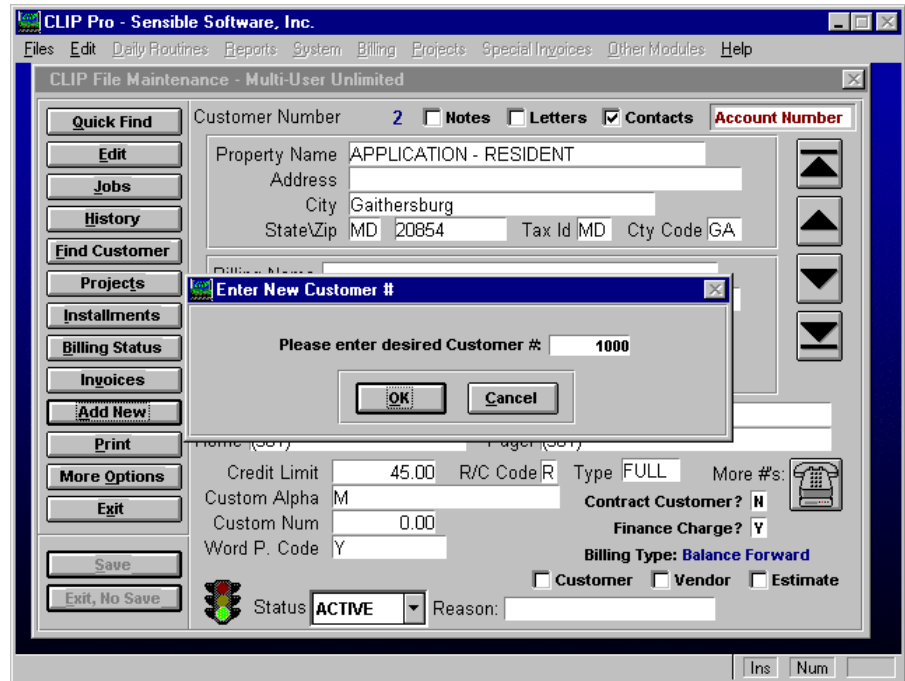
Status ACTIVE Reason:

Select action to perform. Press PgUp to return to Quick Search. Ins Num



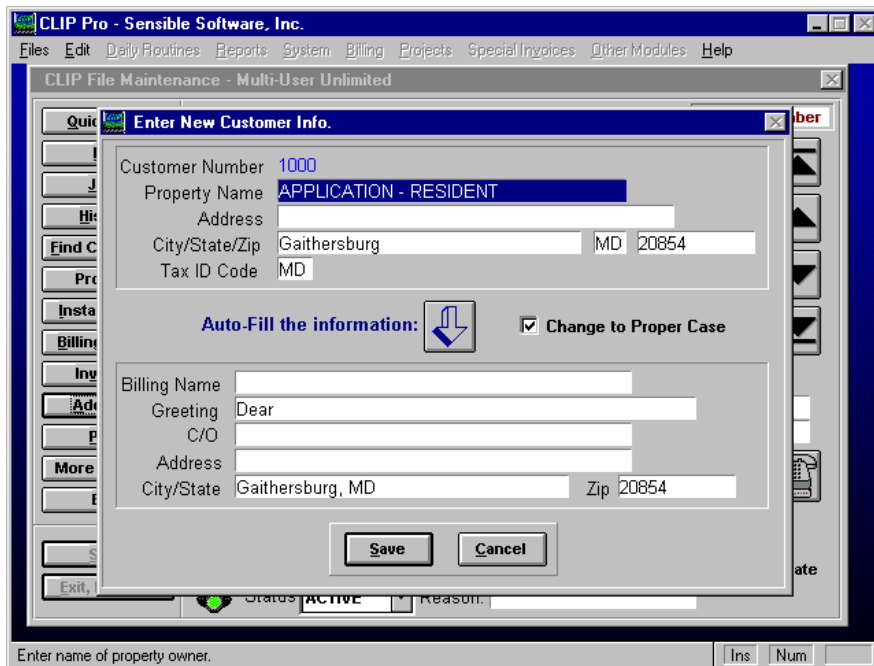
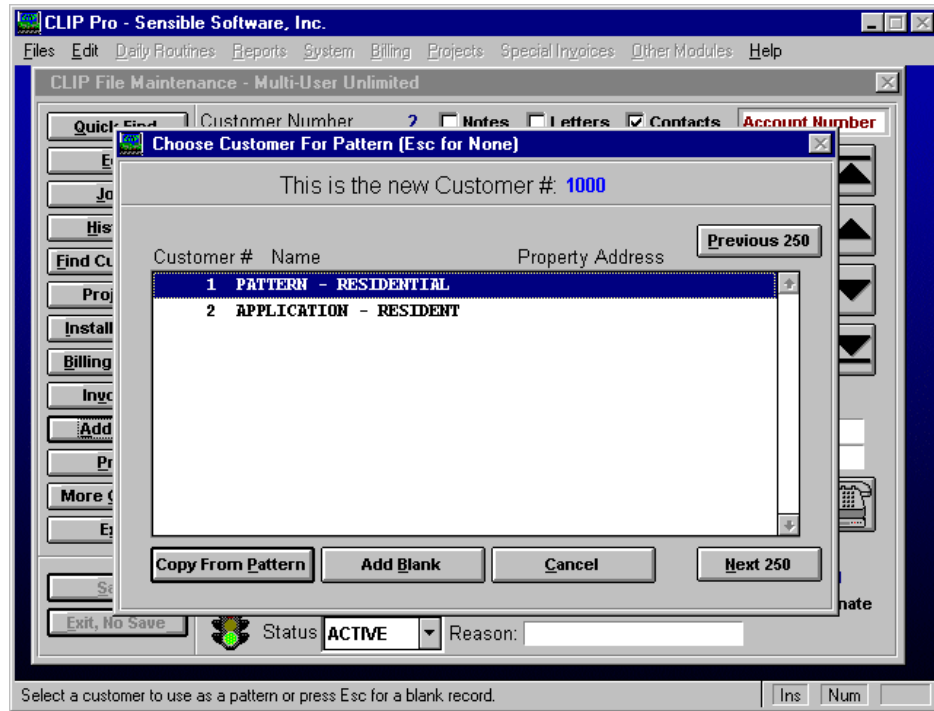
We want to leave some numbers available for more patterns if we want them, so we will start our real customers off with a higher number, (1,000) and have *CLIP* number them up from there.

Enter a 1000 here for the new customer number.



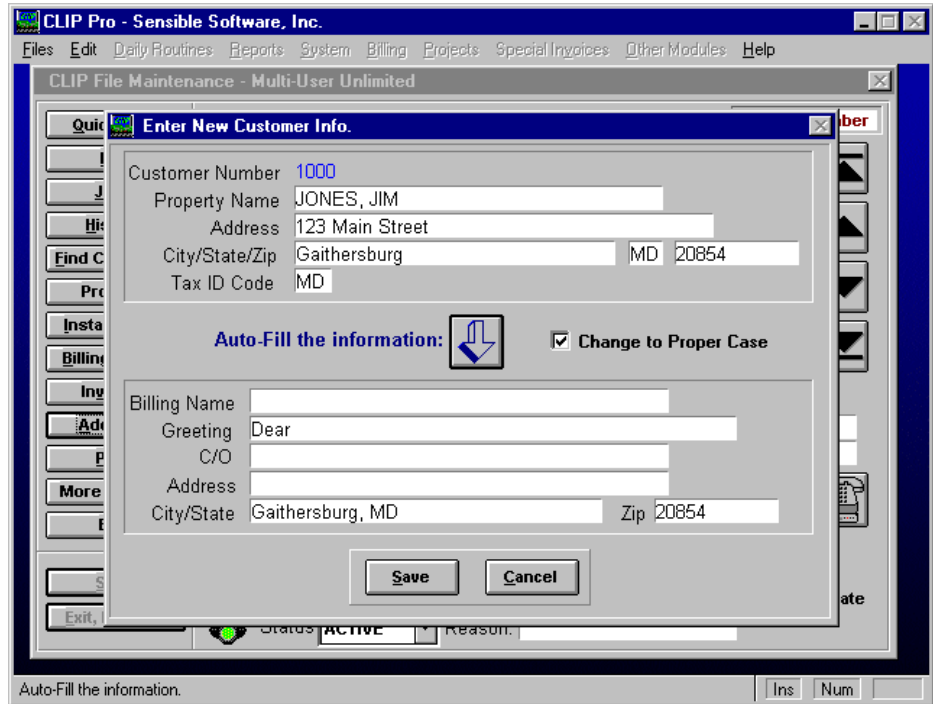
Press the “OK” button to go on.

Choose the Application Resident as your pattern to copy from. Click on it and then press the “Copy from Pattern” button.

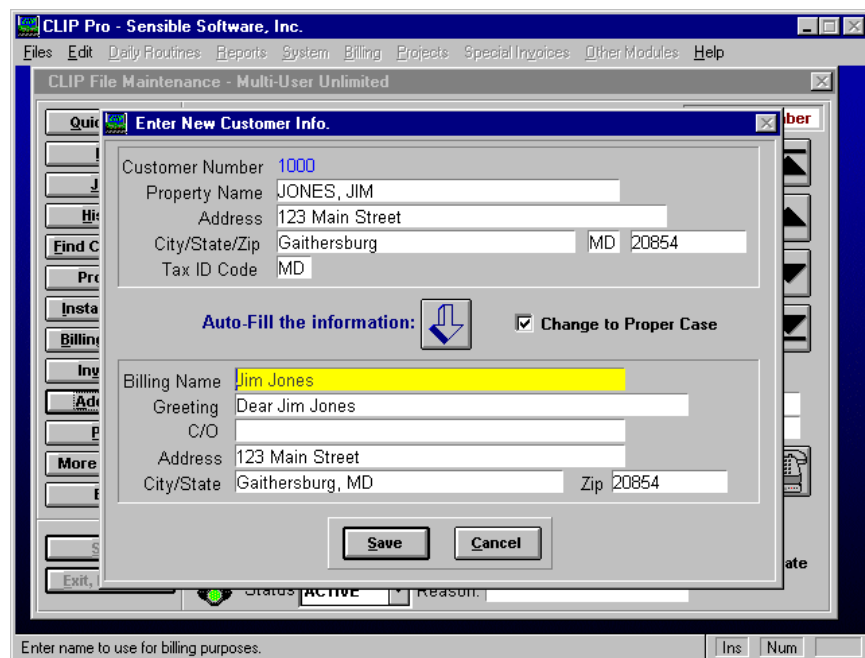


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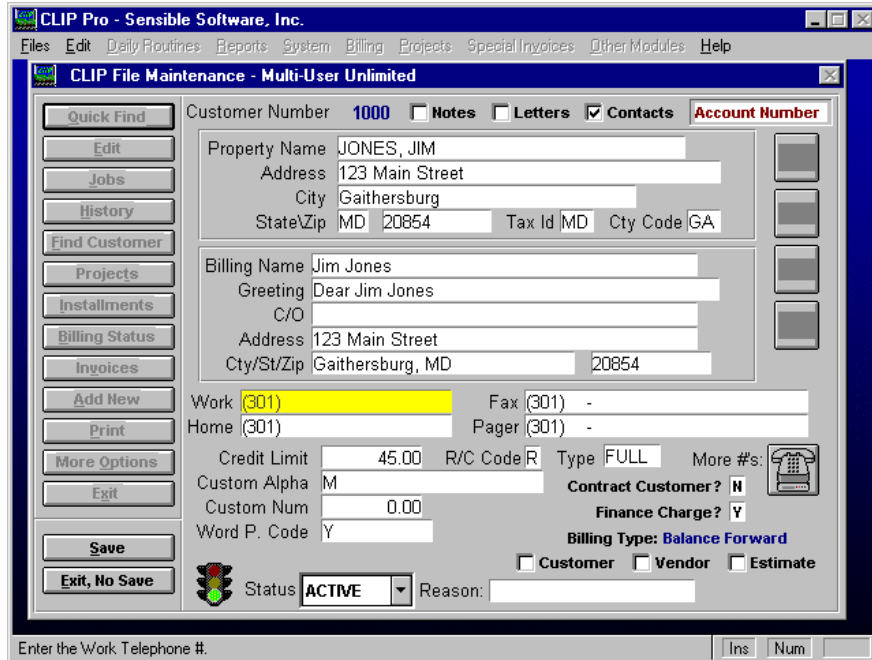
Change the property name to the new customer “Jones, Jim” and enter the address of the property and the city, state, and zip. The Tax Id should be the same as the state unless you have special taxing needs. See the reference manual for more information on Tax Id.



Press the Auto-Fill button to carry the information down to the Billing name and address. If the “Change to proper case” is checked, **CLIP** will take a name that has a comma in it and change reverse the order and take out the comma. It will also change the property name to upper and lower case.

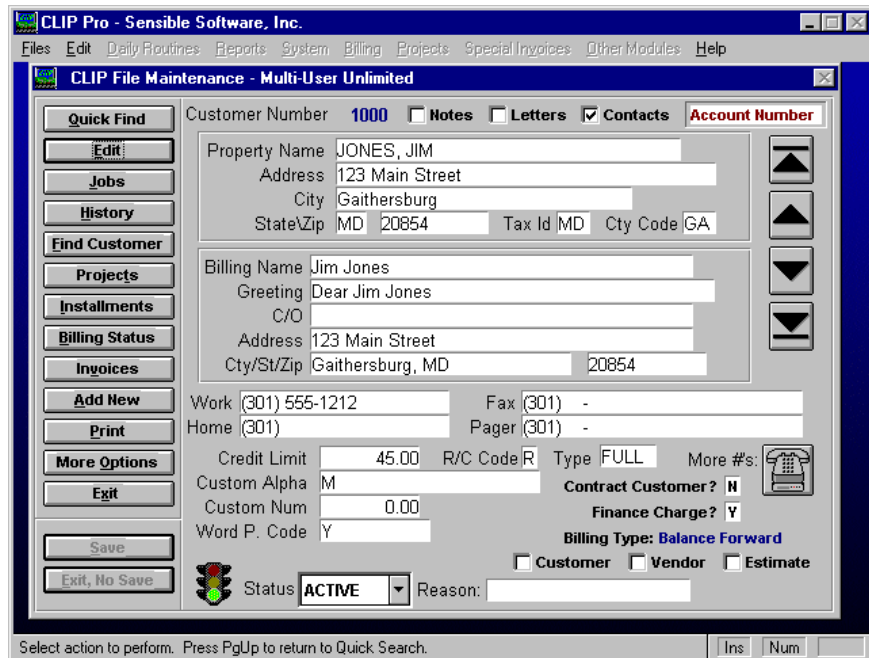


Now press the “Save” button.



Now enter the phone numbers for the new customer.

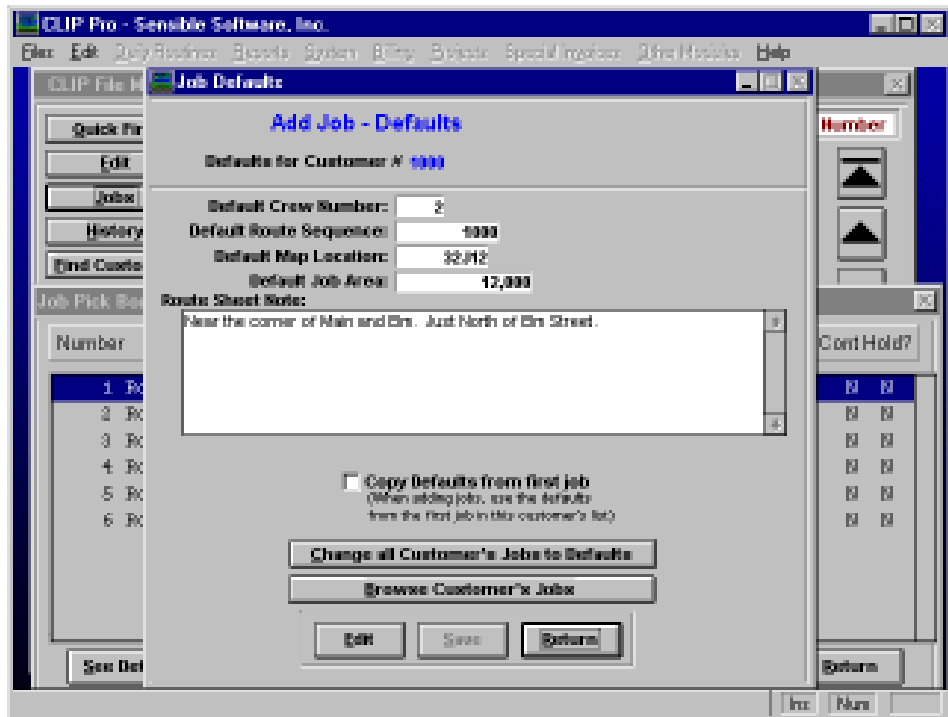
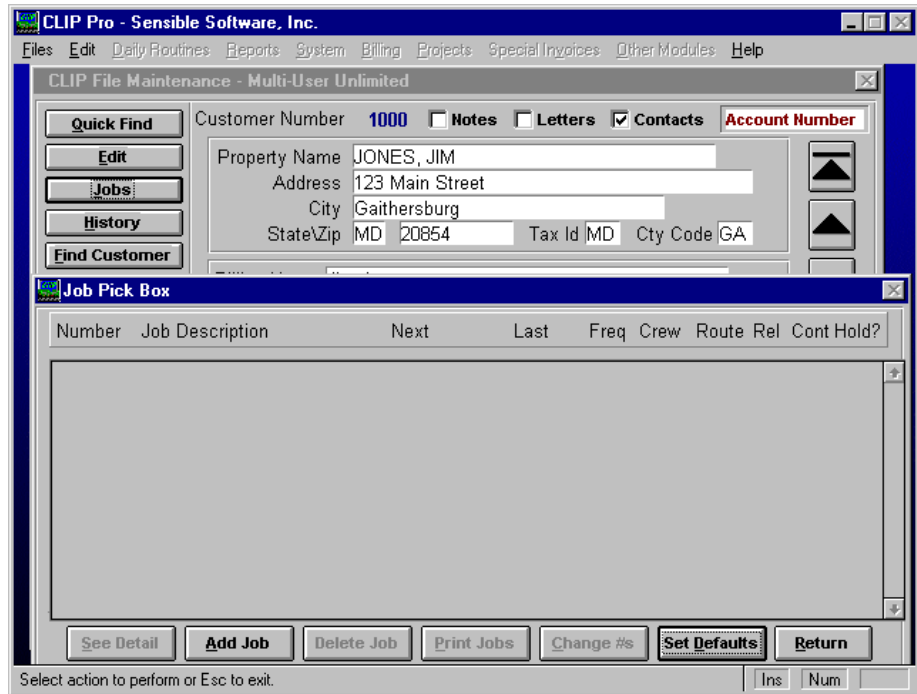
Press the “Save” button when you are done. Notice that a lot of the fields are already filled in, this is because the defaults have carried over from the Pattern customer that we created.



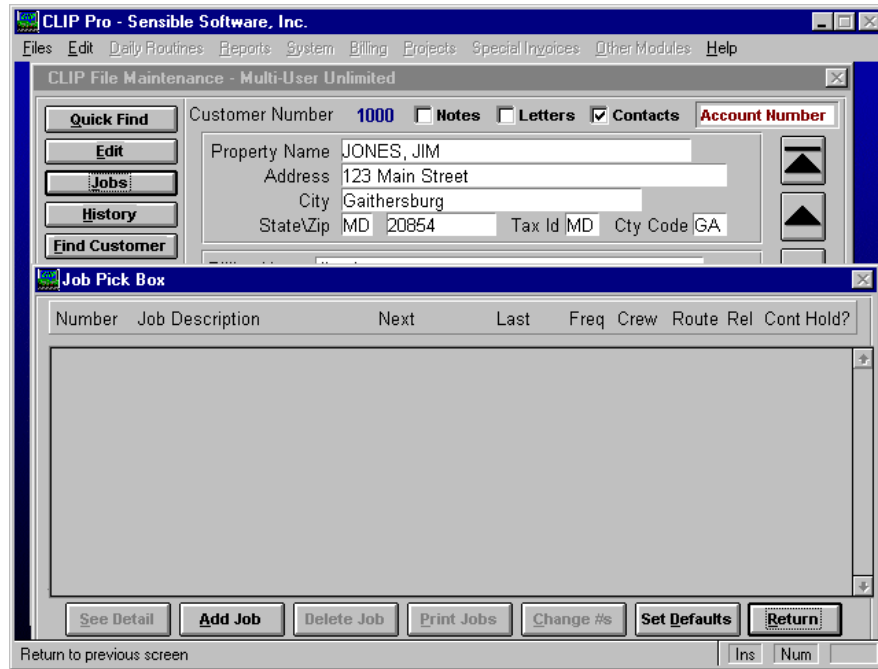
Step 4 - Enter the Jobs for the New Customer

Press the “Jobs” button to get ready to add jobs.

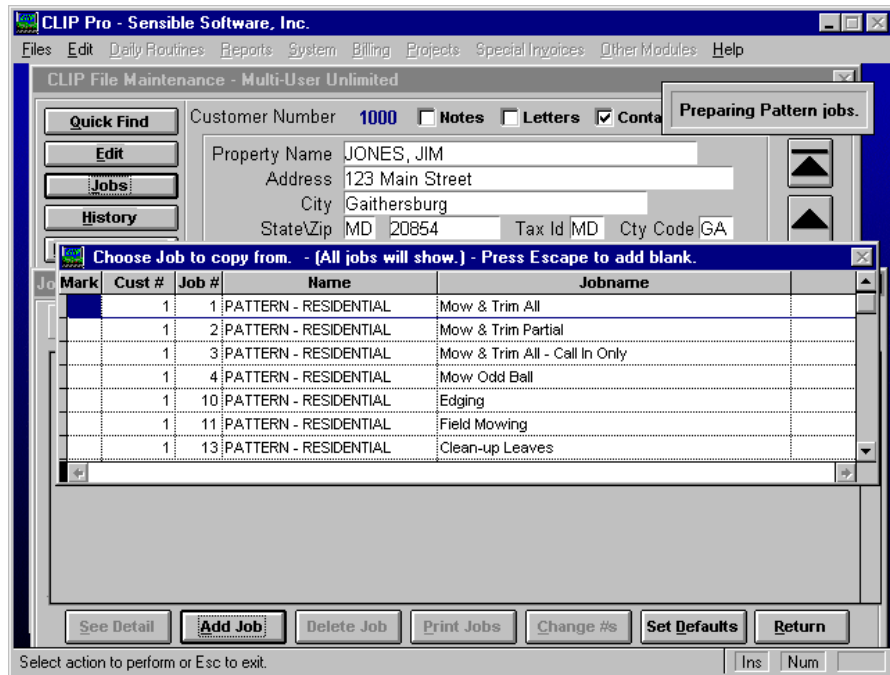
The first thing we want to do is set up the defaults for the new jobs that apply only to this customer. Press the "Set Defaults" button.



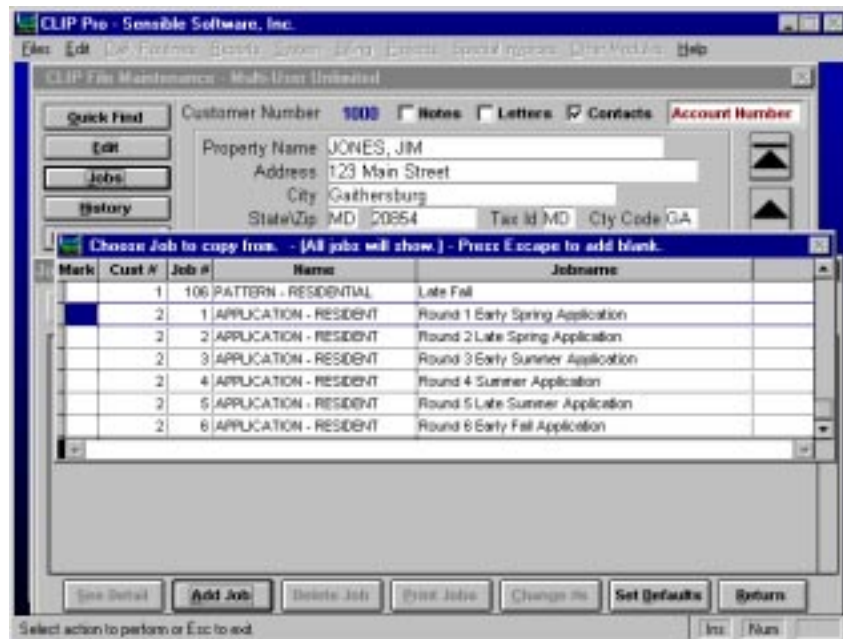
Press the “Edit” Button and enter the defaults as above. This will cause **CLIP** to override the crew number, routing sequence, map location, area and Route Sheet Notes fields with the ones you enter here. Press the “Save” button and then “Return”. Whatever you place in the Route Sheet Notes area here will be placed before the regular Route Sheet notes from the pattern jobs. In other words, my pattern job for Round 1 might have the normal instructions for the particular chemical I am using but the notes I place here will show up on top of those notes, giving my technician the directions to the customer’s property and then the directions for the chemical used.



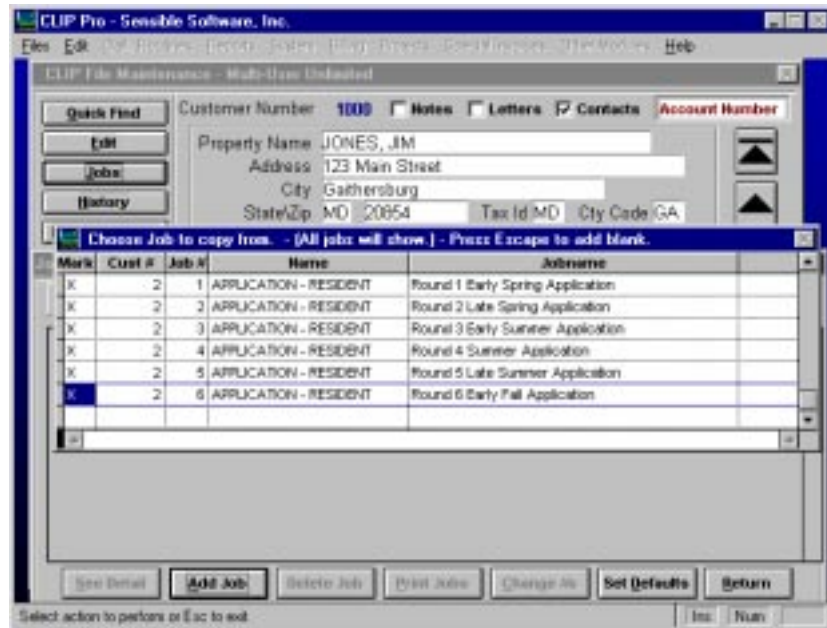
Now press the "Add Job" button to add the 6 rounds for this customer.



Use the Page Down key or the down arrow key to get to the jobs we set up for customer # 2.

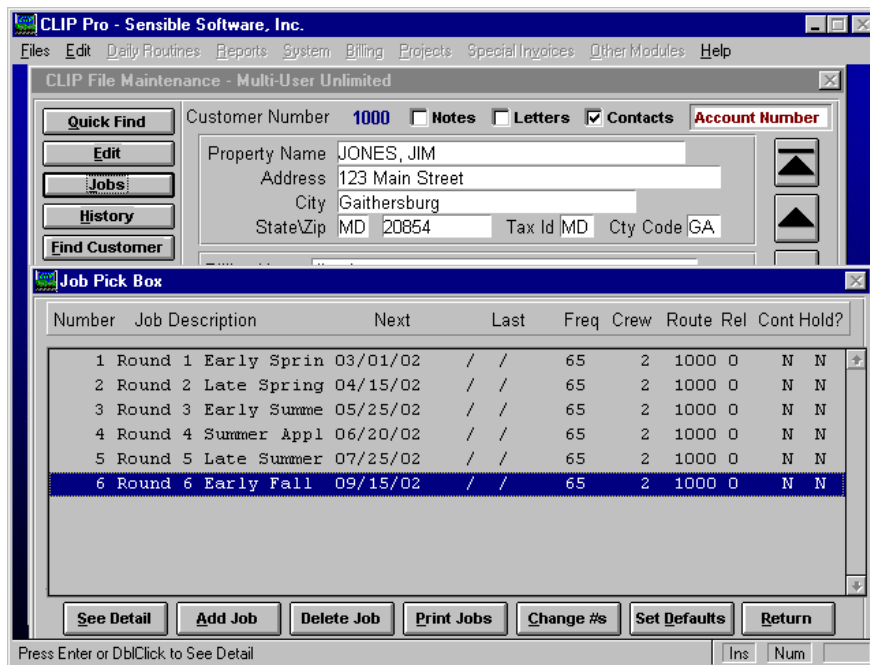


Use the space bar to mark all six rounds.

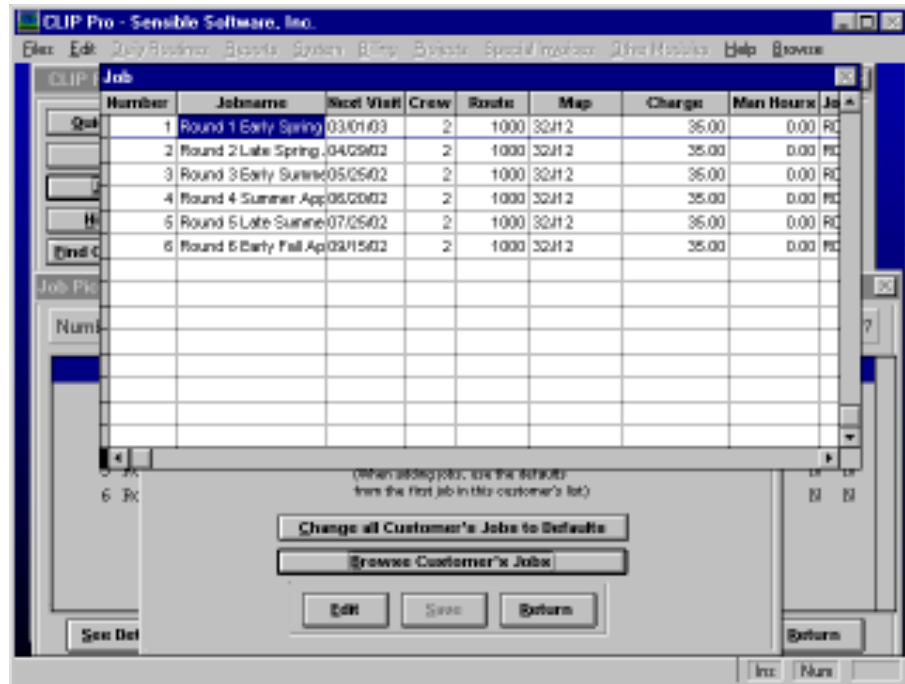


Now press the Enter key to process the jobs.

All six jobs were added to this customer.



Now you need to change the charge per job and other pertinent information. You could go through each job and change it, or you can use the "Set Defaults" button and then "Browse Jobs" and change it there. This is much easier to do.



Notice that all the other fields have been filled in with the appropriate information from the pattern jobs.

Repeat the process for all of your customers.

Step 5 - Processing the Data

Now that you have entered your customers into **CLIP** with all the jobs for all 6 rounds, the next step is to print out the Invoices/Work orders for your technicians to take out with them.

Refresh the Work Bank

Lets assume that it is now March 15th, 2002. The first step in this process is to tell **CLIP** to compile the list of jobs that are due for March 15th. We will do that by "Refreshing the Work Bank" from the Daily Routines Menu.



Enter 3/15/02 as the date for refreshing the work.



Press the “Continue” button and **CLIP** will search through all of your jobs to find the ones that are due on 3/15 or earlier. These jobs will be compiled into a list called the “Work Bank” from which we will be able to print the invoices and work orders.

Print the Route Sheet Invoices

When this process is done, go to the menu item “Route Sheet Invoices” off of the Daily Routines menu bar.



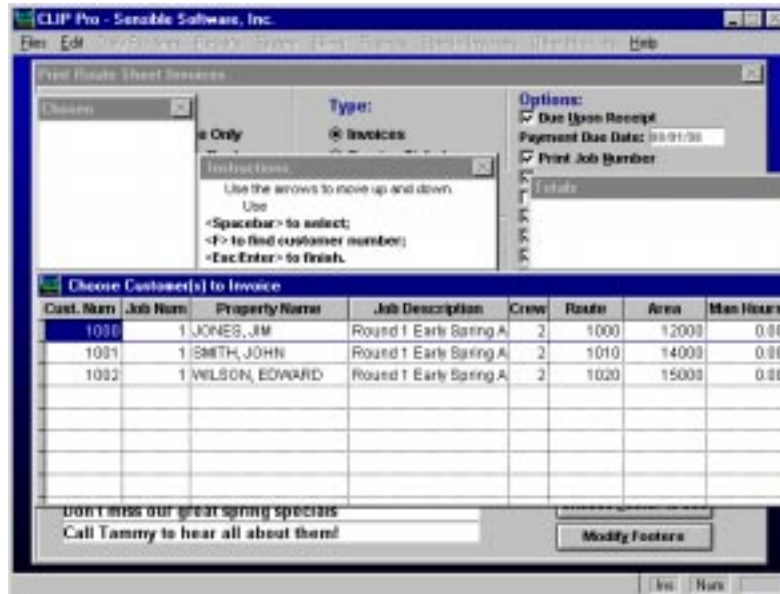
The Route Sheet Invoices have a lot of different options available to customize the invoice to what you need.



You can get exact information on each one of these options in the reference manual. For right now, make sure that you choose the following:

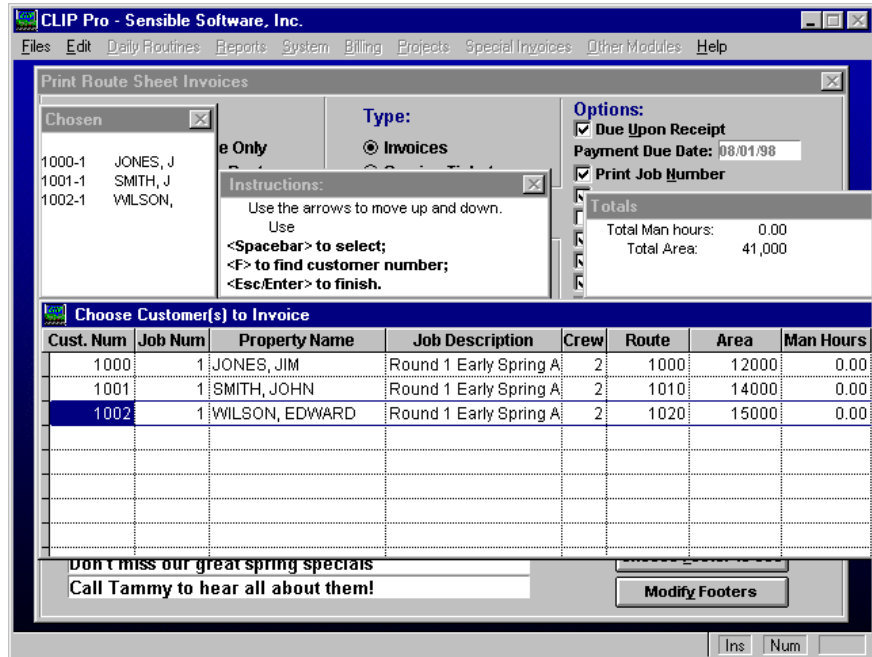
1. Sort by Crew, Route Only
2. Invoices
3. Plain Paper Invoice

Click on the “By Individual” and you will see the list of the jobs that are due or overdue for 3/15.



Press the Space bar on your keyboard to choose the jobs you want to print on Invoices.

Each time you choose a job, you will see the name of the customer in the upper left under “Chosen” and the total man hours and area will show in the upper right hand box.



In this example, we have chosen all three jobs.

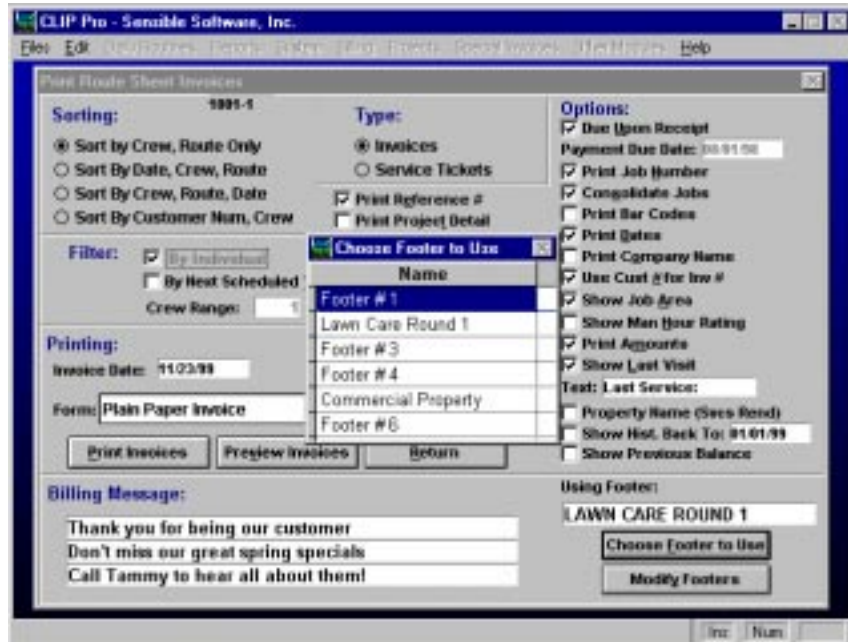
Press the <Esc> or the <Enter> key to finish the process.



Change the Route Sheet Invoice Footers

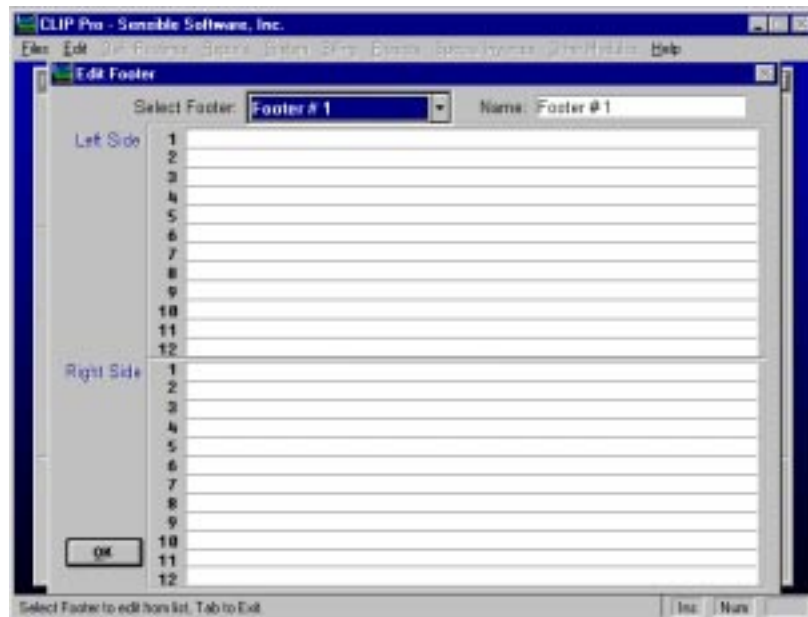
In order to place a form on the bottom of the invoice, you can create this form using the buttons on the lower right hand corner for footers.

Press the “Choose Footer to Use” to see the list of footers available to you. You have 25 different ones to set up.



Press <Enter> to choose the first one, currently named “Footer # 1”.

Now press the “Modify Footers” button to modify it for your own use.



You can change the name to "Early Spring".

Enter information that your technicians will need to fill out.

CLIP Pro - Sensible Software, Inc.

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

Select Footer: **Early Spring** Name: Early Spring

Left Side

1	WIND SPEED	mph	WIND DIRECTION	N	E	S	W	TECH
2	PRODUCT	QUANTITY / TYPE	PRODUCT	QUANTITY / TYPE				
3	Pre-emergent	/	Herbicide	/				
4								
5								
6								
7								
8								
9								
10	WAIT 24 hrs THEN WATER		WATER IN IMMEDIATLY	WATER IN TO				
11								
12								

Right Side

1	NICIAN	TIME:	xxx>
2			
3	COMMENTS		
4			
5			
6			
7			
8			
9			
10	1/2"	3/4"	1"
11			
12			

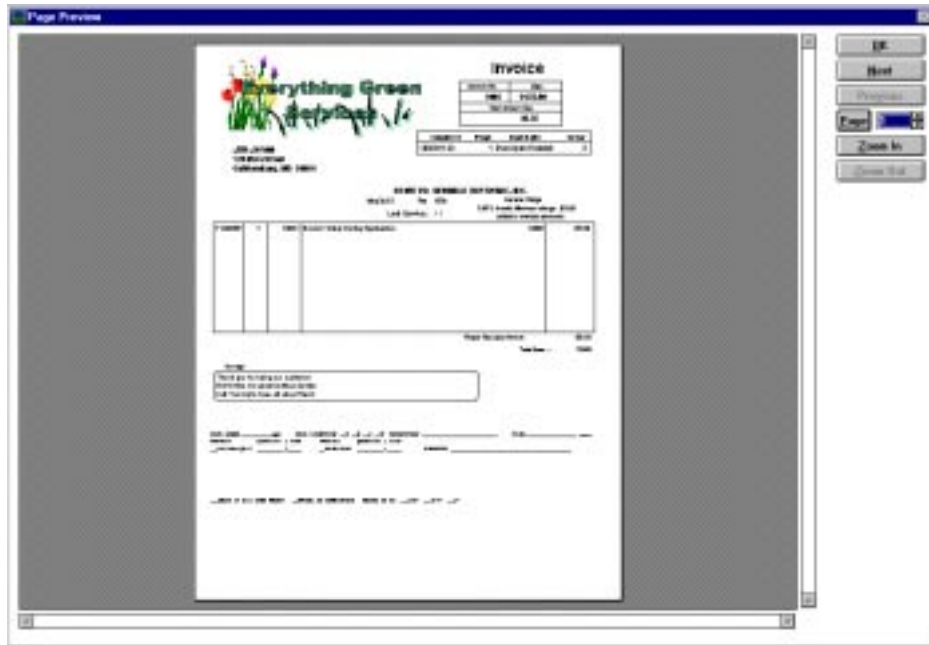
OK

Select Footer to edit from list, Tab to Exit. Ins Num

Notice that the screen is divided into two halves. The left side and the right side, when they are printed they will be printed across the bottom of the invoice. You can place any text you want in this area.

When you are done entering information into the footer, press the OK button to return to the Route Sheet Invoices screen.

Now press the "Preview" button to see what your invoices will look like.

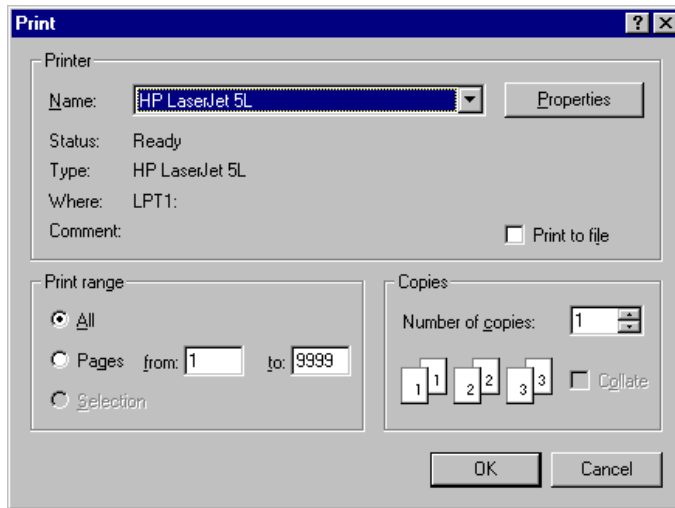


Now you can print these to give them to your technicians to perform the work.

Multiple Copies: There are various ways to get multiple copies, some people use multi-part forms in a dot matrix printer. There are some obvious advantages to this but the disadvantage is that dot-matrix printers are very slow.

Laser printers are faster but they will not print through multiple copies. There are some office stores that sell multi-sheet laser paper but it is expensive and not widely available at this time.

The other option is to use plain paper, but get the printer to print two copies of each invoice. You can do this when you press the "Print" button and you have the option of printing multiple copies.



Your technicians will have to fill out two copies, one for the customer and one for the office, but the printing goes very quickly and each copy is as crisp as the original.

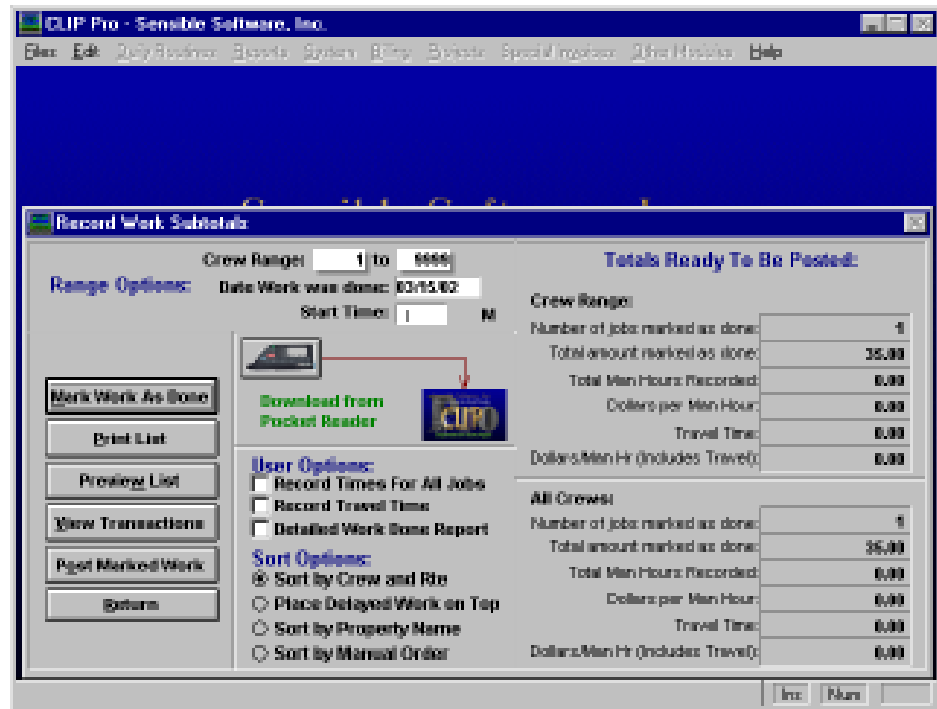
Step 6 - Posting the work into *CLIP*

When your technicians return with your office copy, you will need to tell **CLIP** that you have performed the service so that the information can move from the schedule to the billing section of **CLIP**.

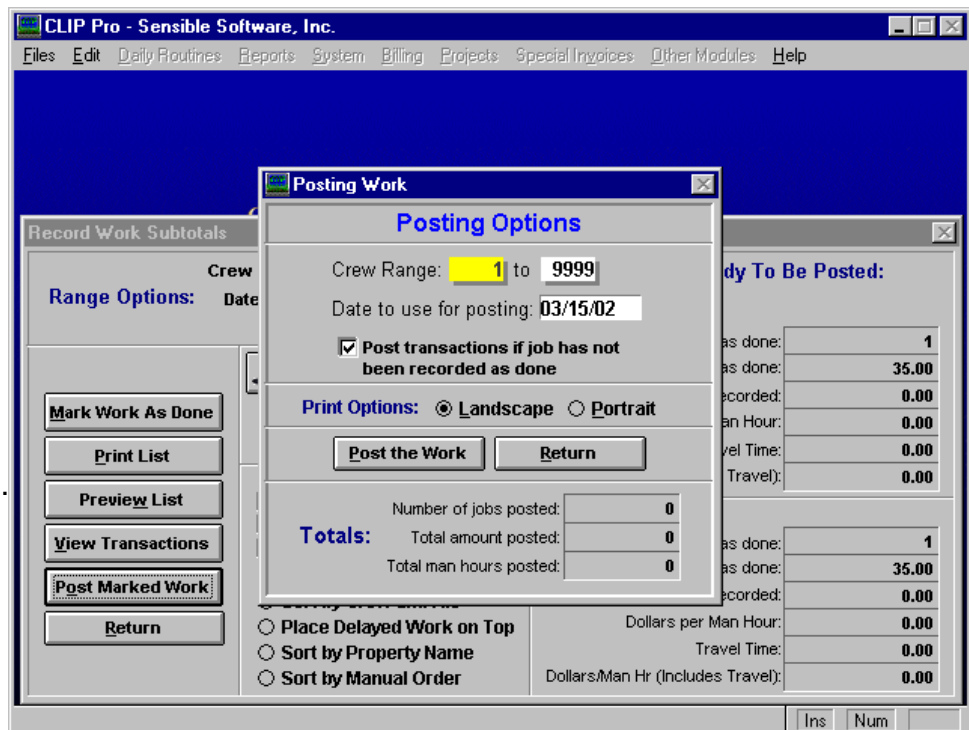
With the completed Invoice in hand, choose “Daily Routines”, “Record Work” to record the job as done.



Notice that we marked the first job, "Jim Jones" as done. Now press the <Esc> key and get ready to post it to the system.

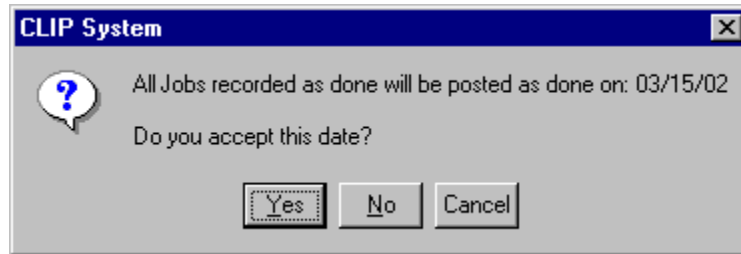


Notice that the totals show up on the right hand side of the screen. Now press the "Post Marked Work" button.



Make sure that you check the recording date. All the work will be rescheduled based on this date and will go into the billing history with this date as the transaction date.

When you have checked the date, press the “Post the Work” button and **CLIP** will ask you one more time to verify the date.

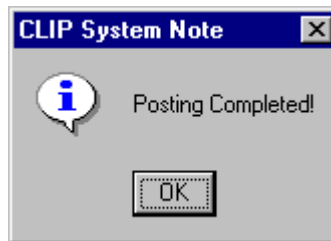


Press “Yes” and **CLIP** will post and reschedule the work.

CLIP will ask you if you want a “Final List of Work Done”. If you answer “Yes”, you will get a print out of the work you just posted. It is good to have these lists so that you can keep a paper trail.

If you press “Yes”, you will get the print out.

After the print out you will get a message that says “Posting Complete”.



Press “Okay”.

Exit the “Record Work” process by pressing the “Return” button.

Step 7 - Check the Results

Go into File Maintenance to see the results of our efforts.



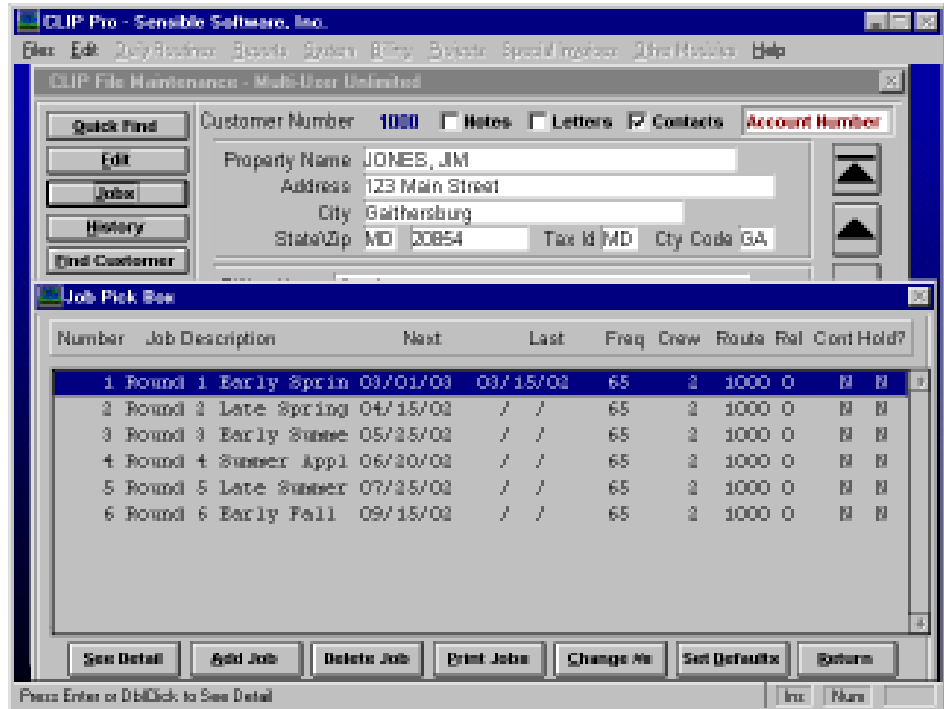
Choose customer # 1000 and get to the main Customer Screen.

The screenshot shows the 'CLIP File Maintenance - Multi-User Unlimited' window. The title bar reads 'CLIP Pro - Sensible Software, Inc.' and the menu bar includes 'Files', 'Edit', 'Daily Routines', 'Reports', 'System', 'Billing', 'Projects', 'Special Invoices', 'Other Modules', and 'Help'. The window title is 'CLIP File Maintenance - Multi-User Unlimited'. On the left is a vertical toolbar with buttons: 'Quick Find', 'Edit', 'Jobs', 'History', 'Find Customer', 'Projects', 'Installments', 'Billing Status', 'Invoices', 'Add New', 'Print', 'More Options', 'Exit', 'Save', and 'Exit, No Save'. The main area contains the following fields and controls:

- Customer Number: 1000
- Notes:
- Letters:
- Contacts:
- Account Number: (highlighted)
- Property Name: JONES, JIM
- Address: 123 Main Street
- City: Gaithersburg
- State\Zip: MD 20854
- Tax Id: MD
- Cty Code: GA
- Billing Name: Jim Jones
- Greeting: Dear Jim Jones
- C/O: (empty)
- Address: 123 Main Street
- Cty/St/Zip: Gaithersburg, MD 20854
- Work: (301) 555-1212
- Fax: (301) -
- Home: (301)
- Pager: (301) -
- Credit Limit: 45.00
- R/C Code: R
- Type: FULL
- More #s: (phone icon)
- Custom Alpha: M
- Contract Customer?: N
- Custom Num: 0.00
- Finance Charge?: Y
- Word P. Code: Y
- Billing Type: Balance Forward
- Customer:
- Vendor:
- Estimate:
- Status: ACTIVE (with traffic light icon)
- Reason: (empty)

At the bottom, there is a status bar with the text 'Select action to perform. Press PgUp to return to Quick Search.' and buttons for 'Ins' and 'Num'.

Press the "Jobs" button to see the jobs or services.



Notice that the “Last” is filled in with the date it was done.

Press the “See Detail” button to see the job details.

The screenshot shows the 'CLIP Pro - Sensible Software, Inc.' window with the 'Job Details' tab selected. The interface includes a menu bar (File, Edit, Job Details, Reports, System, Billing, Service, Special Services, Other Modules, Help) and two sub-tabs: 'Job Details' and 'Job Scheduling'. The main area contains the following information:

- Job Number: 1
- Job Description: Round 1 Early Spring Application
- Custom Fields: Job Type: RD1, Custom Letters: (empty), Custom Numbers: 0.00
- Routing Information: Crew Number: 2 (1-9999), Routing Sequence: 1000, Map Location: 32J12
- Min. Jobs per Year: 1, Max: 1
- Done to Date: 1
- Charge per Job: 35.00
- Man Hour Rating: 0.00
- Charge Over Max: 0.00
- Charge per Hour: 0.00
- Job Area: 12,000
- Tax Type (D,M,L): (empty)
- Average Time: 0.00

Financial summary:

- Credit: 40954
- Debit: 41388
- Accounts Receivable

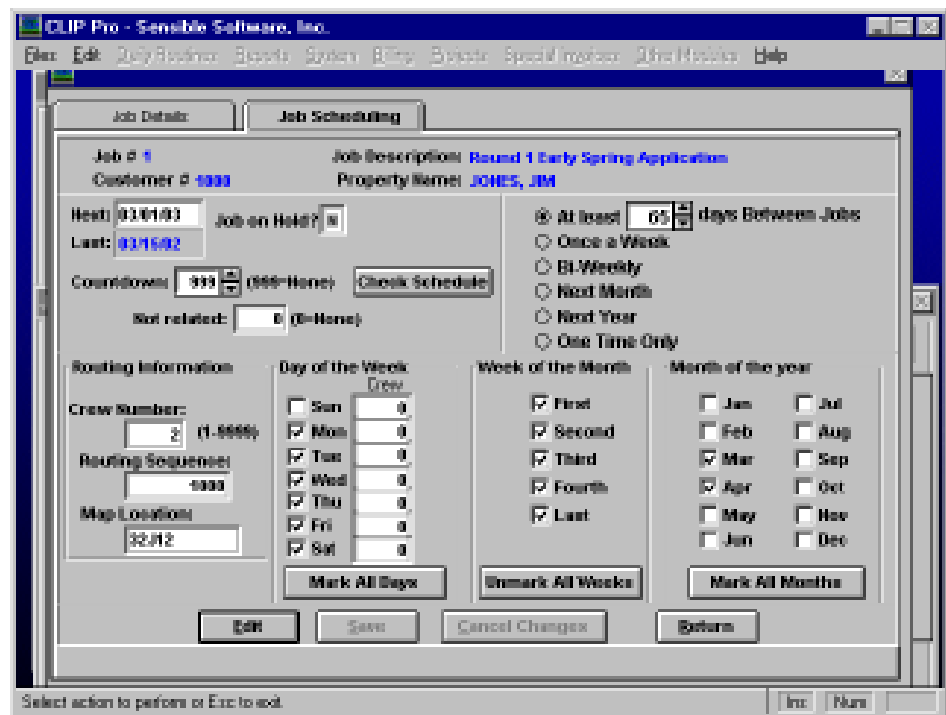
Route Sheet Notes: (empty text area)

Buttons at the bottom: Edit, Print, History, Save, Notes, Chemicals, Return.

Footer: Select action to perform or Esc to exit. In: Num

Notice that the “Done to Date” came up by one.

Now click on the “Scheduling” Tab to see how *CLIP* re-scheduled it.



Notice that the "Next Visit" is now set to 3/1/03 or the first Saturday in March of the year 2003.

Now get back to the main Customer screen and press the "History" button.

CLIP Pro - Sensible Software, Inc.

CLIP File Maintenance - Multi-User Unlimited

Customer Number 1000 Notes Letters Contacts **Account Number**

Property Name: JONES, JIM
Address: 123 Main Street
City: Gaithersburg
State/Zip: MD 20854 Tax Id: MD City Code: GA

Billing Name: Jim Jones
Greeting: Dear Jim Jones
C/O:
Address: 123 Main Street
City/State/Zip: Gaithersburg, MD 20854

Work (301) 555-1212 Fax (301) -
Home (301) Pager (301) -

Credit Limit: 45.00 R/C Code: R Type: FULL More #s:
Custom Alpha: M Contract Customer?
Custom Num: 0.00 Finance Charge?
Word P. Code: Y Billing Type: Balance Forward
 Customer Vendor Estimate

Status: ACTIVE Reason:

Select action to perform. Press PgUp to return to Quick Search.

CLIP Pro - Sensible Software, Inc.

CLIP File Maintenance - Multi-User Unlimited

Customer Number 1000 Notes Letters **Total time to process: 0.003**

Customer: JONES, JIM
Account #: 1000

See Detail
Report History
Delete Line

Status:	Amount	Amount
No-Tax Debits:	35.00	
Tax Labor Debit:	0.00	
Tax Mail Debit:	0.00	
Service Charges:	0.00	
Total Credits:	0.00	
Totals:	35.00	

Seq.#	Date	Amount	Code	Description
1	11/23/99	0.00	Balance	
2	/ /	0.00	Current	
3	03/15/02	35.00	Debit	Round 1 Early Spring Appl

Return

Status: ACTIVE Reason:

Double click on item to see detail, or press See Detail button.

Notice that the job was recorded in the History for the customer.

Step 8 - Receive the payment

If your technician left the invoice copy on the door, you can expect payment within a few days. When the payment is received, you will want to enter it into **CLIP**.

From the main menu, press the “Files” option then press the “Enter Transactions” option.



You will see the "Enter Transactions" screen.

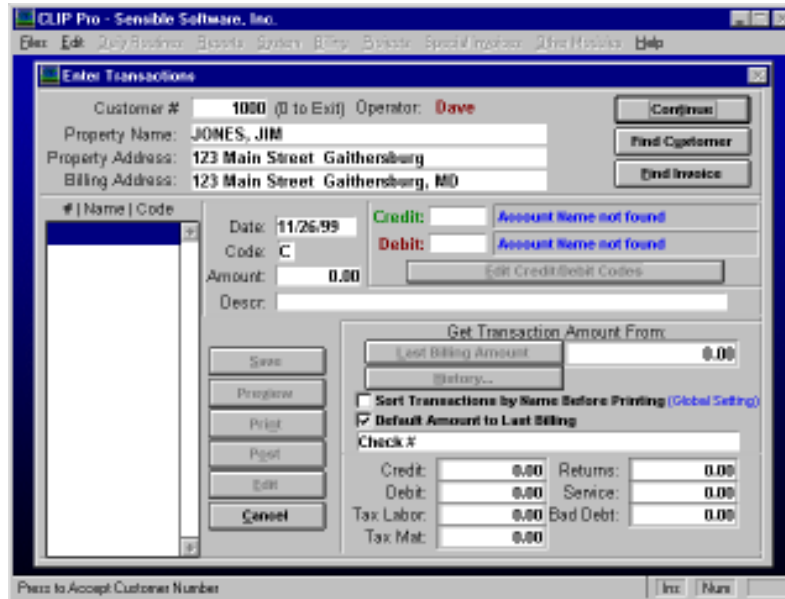
The screenshot shows the 'Enter Transactions' window in CLIP Pro. The window title is 'CLIP Pro - Sensible Software, Inc.' and the subtitle is 'Enter Transactions'. The interface includes a menu bar with 'Files', 'Edit', 'Daily Routines', 'Reports', 'System', 'Billing', 'Projects', 'Special Invoices', 'Other Modules', and 'Help'. The main area contains several sections:

- Customer Information:** Customer # (0), Operator (Dave), Property Name, Property Address, and Billing Address fields.
- Transaction Details:** Date (11/26/99), Code (C), Amount (0.00), and Description field.
- Account Information:** Credit and Debit fields, both showing 'Account Name not found'.
- Buttons:** Continue, Find Customer, Find Invoice, Save, Preview, Print, Post, Edit, and Cancel.
- Summary Table:** A table showing transaction amounts for various categories.

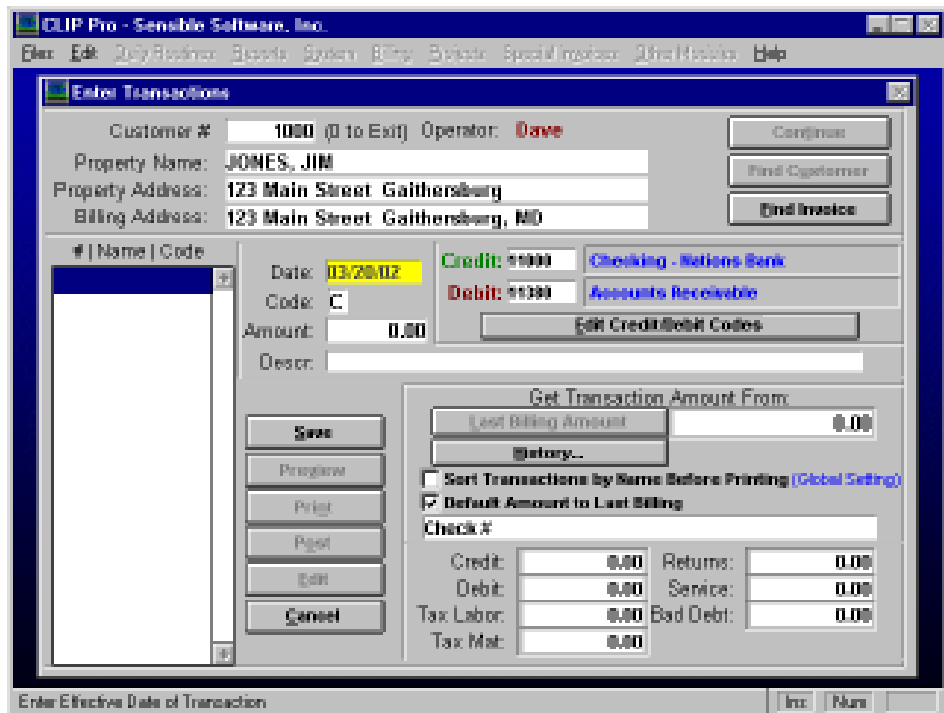
Get Transaction Amount From:			
Last Billing Amount			0.00
History...			
<input type="checkbox"/> Sort Transactions by Name Before Printing (Global Setting)			
<input checked="" type="checkbox"/> Default Amount to Last Billing			
Check #			
Credit:	0.00	Returns:	0.00
Debit:	0.00	Service:	0.00
Tax Labor:	0.00	Bad Debt:	0.00
Tax Mat:	0.00		

Enter Customer Number for Transaction or 0 to Process

Enter the customer number in the box provided, or if you do not know the customer number, press the “Find Customer” button.



Once the customer is found, press the “Continue” button to continue the transaction.



Enter the date that you received the check into the date field.

Enter the code as a “C” for credit or cash.

Enter the amount of the amount of the check in the amount field.

Enter the check number in the description field.

Customer # 1000 (0 to Exit) Operator: Dave
Property Name: JONES, JIM
Property Address: 123 Main Street Gaithersburg
Billing Address: 123 Main Street Gaithersburg, MD

Date: 03/20/02
Code: C
Amount: 35.00
Descr: Check # 1234

Credit: 0000
Debit: 0000

Checking - Nations Bank
Accounts Receivable

Get Transaction Amount From:
Last Billing Amount: 0.00
History...

Sort Transactions by Name Before Printing (Global Setting)
 Default Amount to Last Billing

Check #

Credit: 0.00 Returns: 0.00
Debit: 0.00 Service: 0.00
Tax Labor: 0.00 Bad Debt: 0.00
Tax Mat: 0.00

Save
Preview
Print
Post
Edit
Cancel

Enter Description of Transaction

Save the transaction by pressing the “Save” button.

Customer # 1000 (0 to Exit) Operator: Dave
Property Name: JONES, JIM
Property Address: 123 Main Street Gaithersburg
Billing Address: 123 Main Street Gaithersburg, MD

Date: 03/20/02
Code: C
Amount: 0.00
Descr:

Credit: 35.00
Debit: 0000

Checking - Nations Bank
Accounts Receivable

Get Transaction Amount From:
Last Billing Amount: 0.00
History...

Sort Transactions by Name Before Printing (Global Setting)
 Default Amount to Last Billing

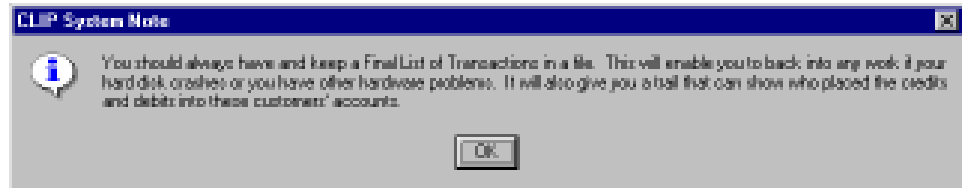
Check #

Credit: 35.00 Returns: 0.00
Debit: 0.00 Service: 0.00
Tax Labor: 0.00 Bad Debt: 0.00
Tax Mat: 0.00

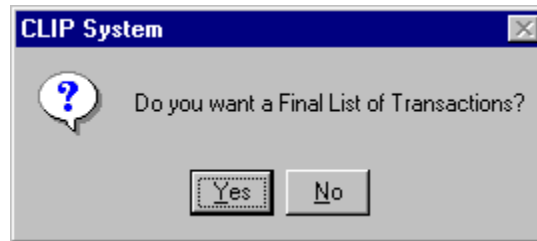
Save
Preview
Print
Post
Edit
Cancel

Enter Customer Number for Transaction or To Process

Press the "Post" button to record the transaction into the system.



Press the "Okay" button to acknowledge the warning about keeping a Final List of transactions.



Press the "Yes" button to get the "Final List" printed.

Print the Final list and you will be returned to the main screen.

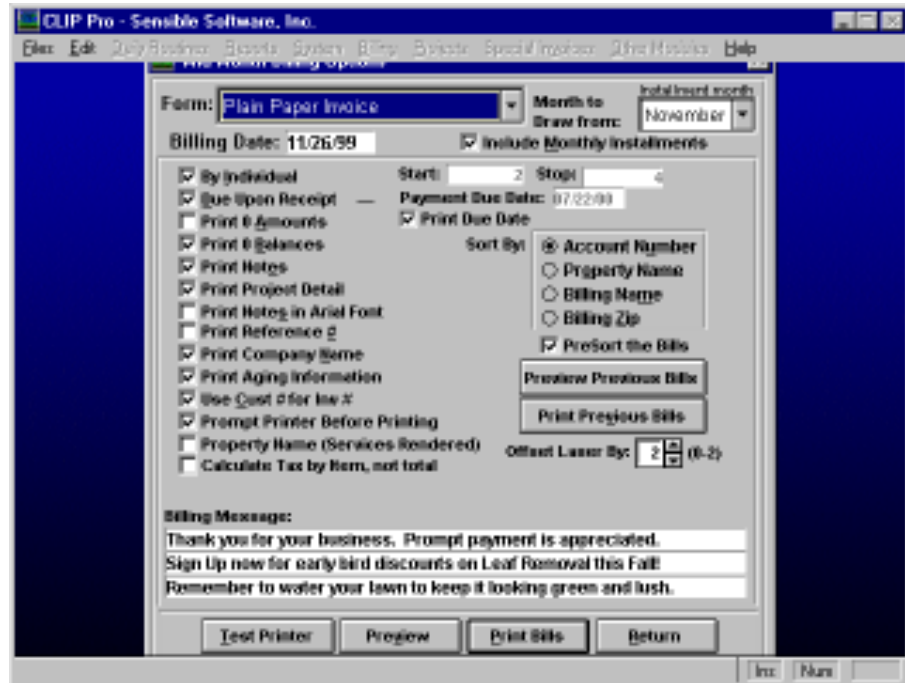
Step 9 - Printing the Statement

Now we want to print statements for our customers at the end of the month in order to catch any customers that might not have been as prompt in paying their bills as we would like.

Pull down the “Billing” sub-menu and choose “Mid-Month” bill. Mid-Month gives us the ability to check our statements before actually processing them. We can use “Mid-Month” as often as we want but we will want to do the full-blown Billing process once a month, just to keep things in-sync.



You can get detailed information on what each and every option does in this screen from the Reference guide. The ones that we really need to keep in mind are the following:



By Individual: If you check "By Individual" you will be able to pick out the customers you want to bill. This is not the easiest way to accomplish our goal so we want to un-check that option and enter the range of 1-5000 to make sure that we cover all of our customers.

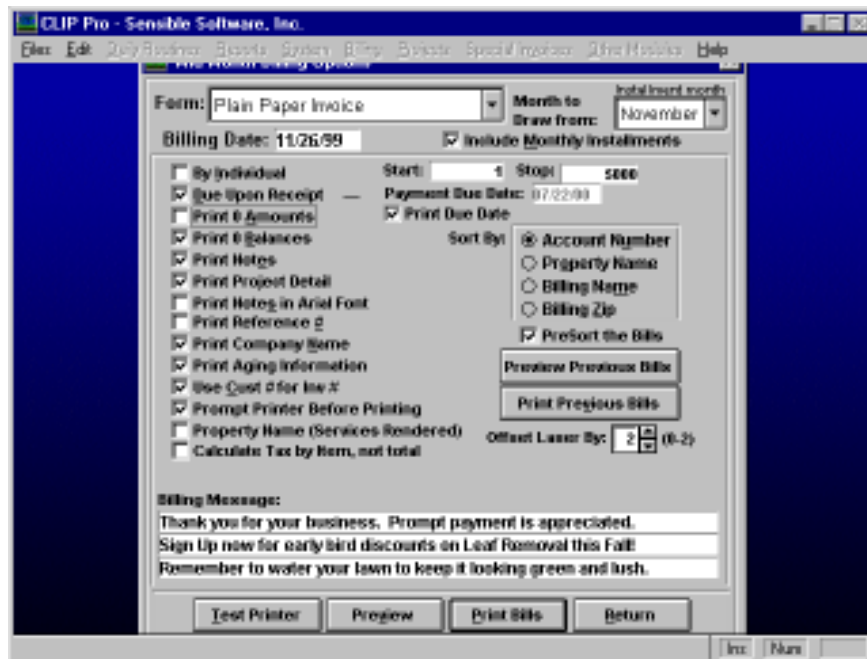
CLIP will not print statements for any customer in your data base that has no activity and no balance. This being the case, we do not have to concern ourselves with our pattern customers or our inactive customers since **CLIP** will not print a statement for them anyway.

Print 0 Balances: Here we have a choice. If a customer has activity but also has a \$0.00 balance, do we want a statement printed? In most cases the answer is "no" because the customer has paid off of the Route Sheet Invoice, we do not need to waste a stamp to send them another statement in the mail. Normally, the LCO would keep this option un-checked.


In order to see the results of what we have done, we will want to leave it checked for now.

Change the "By Individual" to checked off and enter the correct customer number range.

Make sure the "Print 0 Balances" is checked.



Press the "Preview" button to preview your statements.



**Everything Green
Services**

Jim Jones
123 Main Street
Galliersburg, MD 20854

Invoice

Account No.	Date
1000	11/25/99
Total Amount Due	
\$ 0.00	

Due Upon Receipt

Amount Enclosed \$ _____

REMIT TO: SENSIBLE SOFTWARE, INC.

INVOICE #100081126

Service Charge
2.00% / month. Minimum charge: \$5.000
added to overdue accounts.

Previous Balance: **0.00**

Page # 1

DATE	DESCRIPTION	AMOUNT
03/20/02	Check # 1234	CR 35.00
03/15/02	Round 1 Early Spring Application	35.00
		Total Amount Due
		\$ 0.00

Thank you for your business. Prompt payment is appreciated.
Sign Up now for early bird discounts on Leaf Removal this Fall!
Remember to water your lawn to keep it looking green and lush.

Notice that the activity is correctly recorded. The debit for \$35.00 and the credit for \$35.00 with a \$0.00 balance. If we had not recorded a payment for this customer, it would have been a total of \$35.00 due.

Step 10 - Other nuances of the program Route Sheet Invoices - More Details

As you can see from the tutorial, you will be printing most of your work from the Route Sheet Invoices function in **CLIP**. There are a lot of options here that enable you to customize the Invoice to your needs.

By Individual - allows you to pick the individual invoice from the "Work Bank". If you have a lot of customers in the work bank at once (the beginning of a round), you might only want to print out

By Next Scheduled Visit - This option picks out all the jobs that have a certain "Next Scheduled Visit" from the Work Bank. If you place all of your Round 1's on March 15th and then print them out for your technicians to take out to the field, you will probably have new customers calling after the 15th to sign up. As you enter the new customers and jobs into **CLIP**, you will want to place the date that the customer called as the Next Scheduled date. If they call on the 16th to sign up for the service, you will want to put 3/16 in the Next Scheduled Visit of Round 1. Then you can refresh the Work Bank for the 16th and you will

have all the unfinished jobs for the 15th along with the new ones for the 16th. By using this option in printing the invoices, you can specify to have **CLIP** print only the invoices that have a Next Scheduled Visit date of 3/16, meaning only the new ones.

Example: In a Chemical App. Company all of Round 1 will be printed on the first day that it is due. If a company has 1000 customers, this creates 1,000 invoices. As new accounts call in and they want to be added to the route, the easiest way is to place the new jobs with a different "Next Visit" date from the rest. With that habit and this option you can easily print only the new jobs and add them to the operator's route.

Using the <Ctrl+F> key. If you want to find one customer out of the thousands that might be due for Round 1, you can go "By Individual" and then press the <CTRL> key and then the <F> for find. This will bring up a dialog box that allows you to enter text and **CLIP** will search the Work Bank for that text and put your cursor on it.

By Crew Range - This way you can only print route sheet invoices for your Chemical App crews.

Route Sheet Invoice Configurations

Due Upon Receipt and Payment Due Date

If you print your Route Sheet Invoices before you do the work, you probably want the invoices to read "Due Upon Receipt" since you do not know when it will be done or due. If you print out all of Round 1 and then hand it to the technicians to do the work, you will not want to print out the dates on the

Invoices. By not printing dates, **CLIP** will leave a “__/__/__” space wherever dates should go and your technicians will fill out the dates in the space provided. If you use the “Due upon Receipt” option, you do not have to worry about due dates.

Print Job Number

These are the job numbers as displayed in the **Job Pick Box**. If you print them on the invoice, it will make it easier for your to record the work.

Print Reference

This is the “nth” time this job has been accomplished. For LCO purposes this is not necessary since you will continually be servicing each round only one time per year.

Print Project Detail

This option is only relevant if you are using the “Projects” module in **CLIP**. Projects is an additional module that helps with the bidding, estimating, job costing, and completion of landscape construction or other construction jobs.

Consolidate Jobs

If a customer has more than one job, you might want to consolidate them onto one invoice. Most of the time, the Consolidate Jobs should be chosen. There are a couple of exceptions to this, namely; if you are using Bar Codes, Consolidate jobs will not be available to you since the bar code is for each job.

Print Bar Codes

If you are using the Remote Data Collector (RDC) from **CLIP**, you will want to print bar codes on your Invoices. This will allow your technicians to scan the job number into the RDC tracking the exact times that the job started, ended and elapsed time. The RDC’s are a great way to do painless job costing.

Print Dates

If you print your Route Sheet Invoices before you do the work (all of round 1) you probably don’t want to print any dates on the Invoices. (See above on Due Upon Receipt.)

Print Company Name

If you use pre-printed invoices or letterhead you won’t want to print the company name. You can also have **CLIP** print your company logo onto the Invoices by saving your logo as a “BMP” file, naming it “cologo.bmp” and placing it in the \BMP directory of your **CLIPPRO** main directory. **CLIP** will see it there and print it on the Invoices.

Use Customer # for Invoice

If your company does a lot of commercial work, your customers will want to see invoice numbers on their Route Sheet Invoices. Since the Route Sheet Invoices are not real invoices until they are recorded, we have created a way to place invoice numbers on the invoices without all the hassle of voiding invoices and applying payments that other accounting software forces you into.

In **CLIP** Pro if you choose this option, **CLIP** will assign an invoice number that is actually a compilation of numbers. Using our current example, the invoice number for this invoice would be 10003315. This Invoice number means Customer 1000, Decade year 3, Date of printing: 3/15.

Show Job Area

Do you want to show the area on the Invoice or not? You might want to show it to help your applicators know how much product to apply.

Show Man Hour Rating

The man hour rating is the maximum amount of time we want our technicians to take on a job. Your job costing is tightly related to this man hour rating. If this option is checked, it will print this on the invoice to give your technicians the goal to strive for.

Print Amounts

If you do not print amounts on the invoices, they will have the title: "Service Notice." This is just a way of notifying the customer that you were there. If you do not want your customers paying off of your Route Sheet Invoice, you will want to un-check this option.

Show Last Visit

This will show the last time this job was performed. The message which will precede this date appears in the Text box following it. LCO companies will not use this as much, since each round is a separate job. See below on "Show History" and "Show Previous Balance" for a better way to accomplish this task.

Property Name

This option will show the property name and address on the Invoice with a "SvrCs. Rendered" note before it. Use this if you are doing a lot of work on properties that the billing address is different from the servicing address.

Show History Back

This option will show the history for this property back to the date you enter in. This is a great way to show your technician what has happened to the property before he appears to service it again. He can see what was applied, were there any service calls? and other information vital to properly servicing your customer. If this option is checked, **CLIP** will also print the future work on the Invoice showing the technician what is coming up on the property.



Jim Jones
 123 Main Street
 Gaithersburg, MD 20854

Total Amount Due
35.00

Invoice #	Page	Due Date	Crew
100091126	1	Due Upon Receipt	2

REMIT TO: SENSIBLE SOFTWARE, INC.

Map Rte 0 Service Charge
 Last Service: / / 2.00 % /month. Minimum charge: \$5.00
 added to overdue accounts.

	1	1000-0	***** History ---- *****		
03/15/02	1	1000-1	Round 1 Early Spring Application		35.00
03/20/02	1	1000-0	Check # 1234	CR	35.00
11/26/99	1	1000-0	***** Current Work ---- *****		
11/26/99	1	1000-2	Round 2 Late Spring Application	12000	35.00
	1	1000-0	***** Scheduled Work ---- *****		
03/01/03	1	1000-1	Round 1 Early Spring Application	12000	
04/15/02	1	1000-2	Round 2 Late Spring Application	12000	
05/25/02	1	1000-3	Round 3 Early Summer Application	12000	
06/20/02	1	1000-4	Round 4 Summer Application	12000	
07/25/02	1	1000-5	Round 5 Late Summer Application	12000	
09/15/02	1	1000-6	Round 6 Early Fall Application	12000	

Please Pay Last Amount 35.00

Total Area..... 84000
 Total Man Hrs.....

Message:

Thank you for being our customer
 Don't miss our great spring specials
 Call Tammy to hear all about them!

WIND SPEED _____ mph WIND DIRECTION _____ E _ S _ W TECHNICIAN _____ TIME: _____
 PRODUCT QUANTITY / TYPE PRODUCT QUANTITY / TYPE
 _____ / _____ _____ / _____ COMMENTS _____

Show Previous Balance

This option will show the customer all the previous activity, both operations and financial and show him his current billing status amount. This is good to include on the Invoice if you want your customers to pay off of the Route Sheet Invoice.

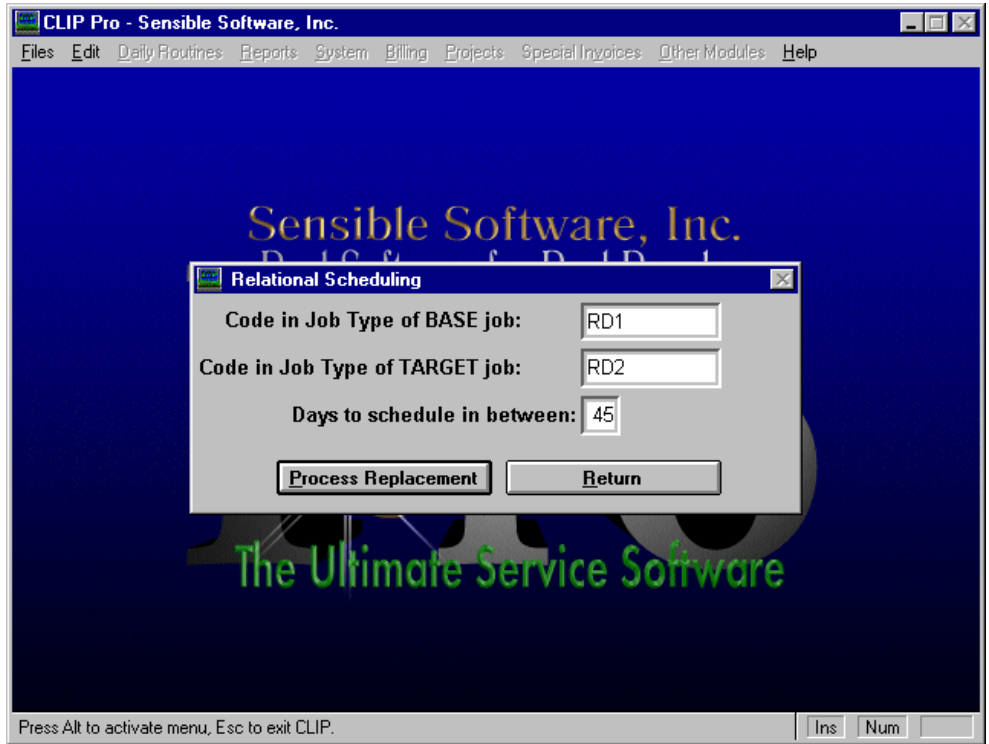
Avoiding two services too close together.

One of the things you want to avoid is servicing a round two, within a few days of the round one. There are two different ways to avoid having this happen to you.

1. Make sure that you print out the history on your customer's Route Sheet Invoice. If your technician reads the invoice, he will be able to see when the job was done and avoid doing the second job too soon.
2. Use a special program that we wrote to take care of this particular problem.



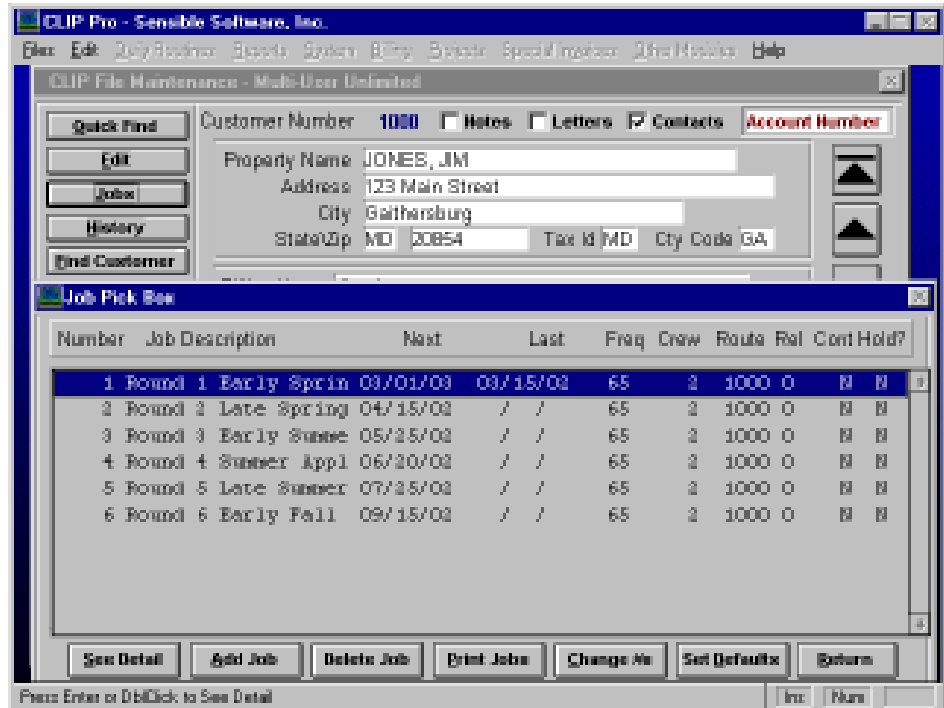
Related Scheduling is a function that will find all of services that have been performed and then find the next service to be performed and force a time period in between. This will prevent you from servicing your clients too close together.



Keying off of the Job Type that we filled in earlier when we set the jobs up for the customer, we can tell **CLIP** to find all of the jobs that have an "RD1" in the job type field and have been finished (done to date = 1) and then find their counter parts (all the jobs that have a job type of "RD2") and change the Next Visit to 45 days after the first one was done.

Lets illustrate using our example:

Notice the jobs:



The first job was done on 3/15. The second job is due on 4/15.

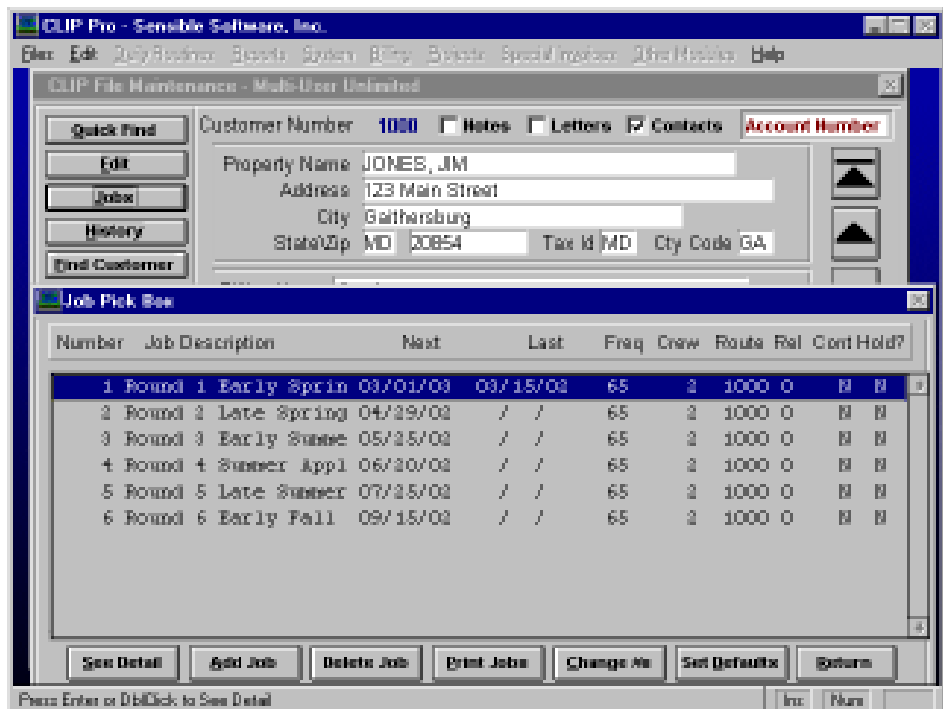
If we want to force 45 days in between these, we can use the Related Scheduling to accomplish it.





We are using the key of the Job Type field to designate what we want. When we press the “Process Replacement” we will see the re-initializing happen and then we are done.

Let’s go back to File Maintenance and check our customer to see if *CLIP* did what we wanted it to do.

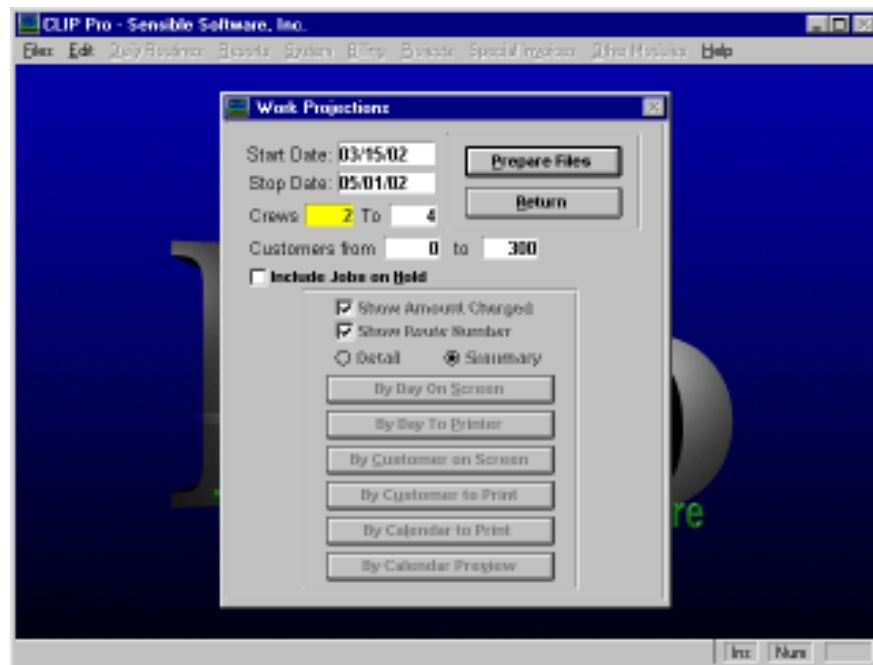
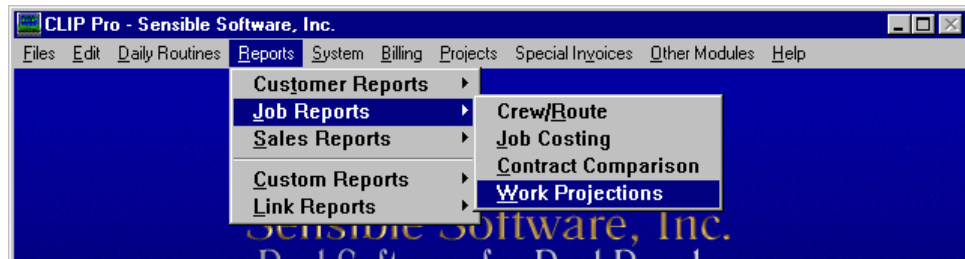


When we check the customer file, we find that it did change the Next Visit date to 4/29 which is 45 days after 3/15, the day we performed Round 1.

To use this to its fullest, you should run this function as you get close to the end of a round, in preparation for the next round.

Checking on the materials requirements for the next round or the remainder of this one.

To check on how much material/labor you will need for the remainder of a round or for the next round, use the Work Projections report. The report gives you the square footage that will be coming up with the next jobs for the dates specified. You will see totals for man hours and for square footage.



Chemical Tracking in CLIP Pro.

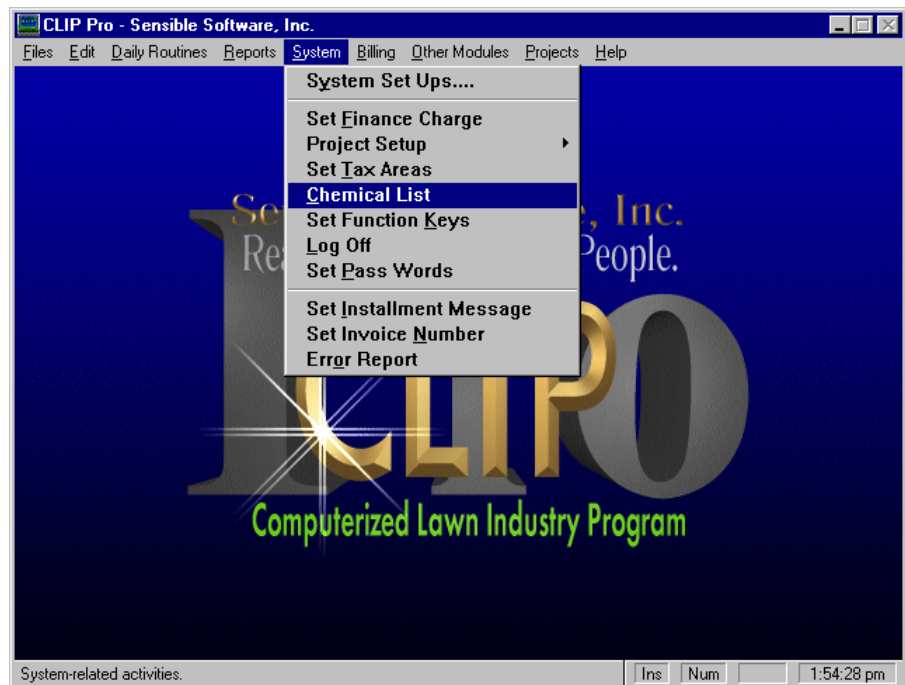
Depending on your particular state requirements, you can use either of two methods for tracking the chemicals used and other particulars. Most states require that you have access to records that would show this. If this is the case for you, the best way to fulfill this requirement is to keep the paper copy of the Route Sheet Invoice with the notations made by the technician in a file box, sorted only on date. To sort on date, you only need to place each Route Sheet invoice into the file in the order it comes back to you. If you are ever audited by your local EPA, simply gather the information from CLIP as to the date of service, then check your file for the actual invoice with the notations. This is much easier than entering all the information into CLIP as the jobs get done.

If you have a local EPA similar to that of New York, they will require a report back to them of all the substances that were applied to a lawn. This creates a lot more work for you as the operator since you have to pro-actively report it to them. To do this in the least painful way possible, CLIP Pro was designed with the Chemical Tracking function.

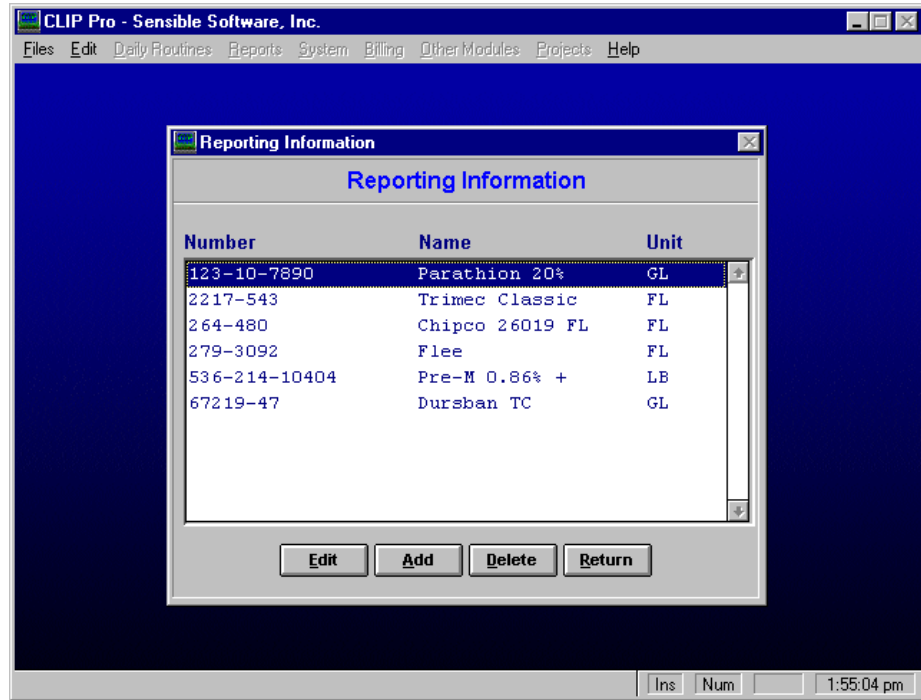
Enter your frequently used chemicals list

The first step is to enter the data for all the chemicals that you frequently use.

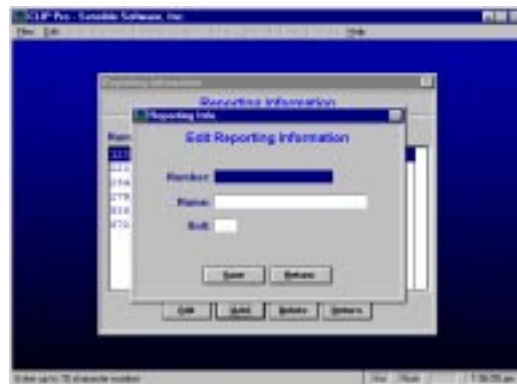
From the Systems menu, choose "Chemical List"



You will see a list of the chemicals currently in the system.



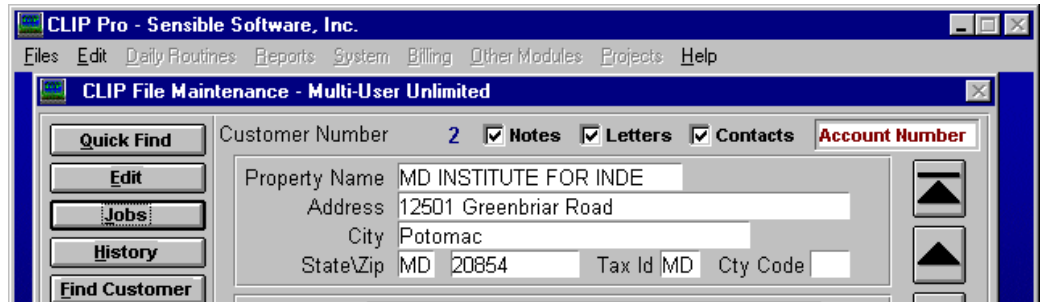
Use the "Add" button to add new chemicals.



Enter the EPA number and the name of the chemical. Enter the unit type as well. This is a two letter code that determines the unit of measure. (LB for pounds, OZ for ounces, etc.)

Enter the county code in your customer's record

There is a new field in the customer main screen for County Code. This field needs to be filled in on all your customers

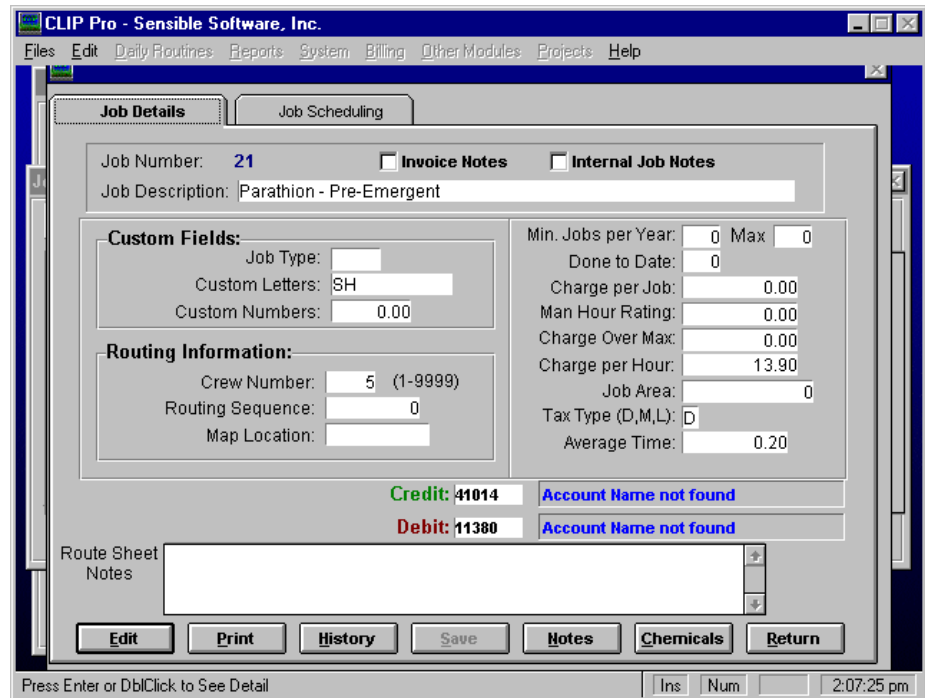


You can use "Replace Information" to help you fill these in but be very careful and make sure you make backups before you attempt it. (See the **CLIP** User's Manual for more information or call Tech Support if you would like someone to walk you through it.)

Enter the chemicals into the jobs

Start with your pattern jobs. You should enter the chemicals into each job in your pattern jobs so that as you enter new jobs, they will already contain the chemical information specific to that job. **CLIP** allows one chemical per job.

Enter the chemicals by choosing the job and pressing the Chemicals button.



Enter the chemical part number. If you do not enter a valid part number, a pick list appear from which you can choose valid numbers. This list is generated from the chemical list you entered under the System menu, "Chemical List." This list can be added to or changed at any time.



The check box, "Track for EPA purposes" allows you to choose which chemical applications appear on the report. When you print the report, you will have the option of including "flagged" records. These records are the ones that have this option checked.

Print your Route Sheets or Route Sheet Invoices

Have your employees fill out the chemical quantities used on each job.

Record work – enter the amount used

As you record the work as done, enter the amounts as indicated on your route sheets.

When you are in the “Mark Work as Done” screen you can press the “R” key or the right arrow to bring up the “Recalc” screen.

This will bring up the Chemical recording screen.

CLIP Pro - Sensible Software, Inc.

Use the Right Mouse Button to see the menu.

Y=Done, M=Mark as Done, W=Enter

Specific Info. on Job

Customer: MEADOWS Job # 9-21
1733 Westridge

Description: Parathion - Pre-Emergent

Crew # 5 Mins: 0.00 Mins This Time: 0.00 (Rounded)
Charge Per Hour: 13.90

Crew Members: 1 Break? N
Start Time: M Charge This Time: 0.00
Stop Time: M \$/Min Hour
Clock Time: 0.000 (Clock) This time: 0.00

Travel time: 0.00

Chemical Tracking

Credit: 4914 Account Name not found
Debit: 11388 Account Name not found

Return

Crew	Job	Amount
1	119-	0.00
3	41-3	120.00
3	121-	200.00
4	21-1	15.28
4	21-1	25.00
4	21-1	0.00
4	21-2	0.00
5	9-21	0.00
5	9-22	0.00
5	9-23	0.00

Inc Nam 2:22:09 pm

CLIP Pro - Sensible Software, Inc.

Use the Right Mouse Button to see the menu.

Y=Done, M=Mark as Done, W=Enter

Chemical Tracking

Customer: MEADOWS Job # 9-21
1733 Westridge

Description: Parathion - Pre-Emergent

Part Number 123-10-7890
Part Name Parathion 20%
Quantity 10.000
Unit Measure GL

Track for EPA purposes?

Return

Crew	Job	Amount
1	119-	0.00
3	41-3	120.00
3	121-	200.00
4	21-1	15.28
4	21-1	25.00
4	21-1	0.00
4	21-2	0.00
5	9-21	0.00
5	9-22	0.00
5	9-23	0.00

Inc Nam 2:23:16 pm

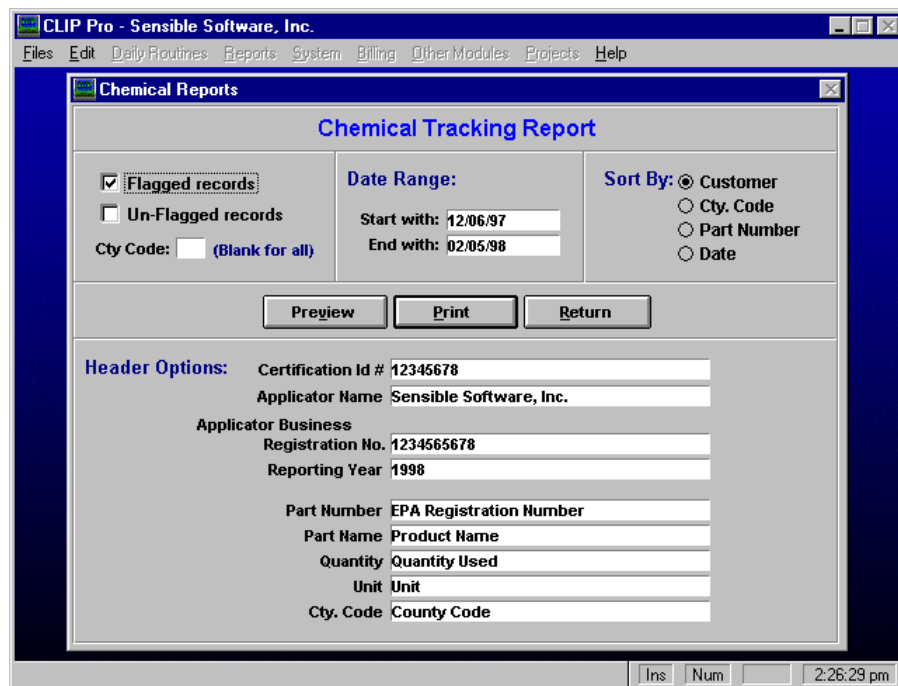
You can record any changes here along with the “real” quantity used.

Print report

After entering all the data on a day-by-day basis, you will be ready to print the report.



The Chemical Usage Report gives you many options:



Fill in all your company information in the appropriate fields. This will be used as a header at the top of each page of the report.

Commercial Certified Applicators Annual Report - Pesticides Used

Certification ID Number	Applicator Name	Applicator Business Registration Number	Reporting Year
12346678	Sensible Software, Inc.	1234666678	1998

Applicator Address: **2 Professional Drive #246** Name of Registered Business: **Sensible Software, Inc.**

Page No. #	EPA Registration Number	Product Name	Quantity Used	Unit	Date	County Code	Property Address	City	Zip Code
	123-10-7890	Parathion 20%	10.0000	GL	0107	99	1733 Westridge	Anytown	55501
	264-480	Chipco 26019 FL	12.0000	FL	0107	99	1733 Westridge	Anytown	55501
	2217-543	Trimec Classic	6.0000	FL	0107	99	1733 Westridge	Anytown	55501
	123-10-7890	Parathion 20%	10.0000	GL	0206	99	1733 Westridge	Anytown	55501
	264-480	Chipco 26019 FL	12.0000	FL	0206	99	1733 Westridge	Anytown	55501
	2217-543	Trimec Classic	6.0000	FL	0206	99	1733 Westridge	Anytown	55501

By using the options for this report, you can modify your report to match the requirements of your particular tracking needs.

Below is a sample report from **CLIP**'s chemical tracking module.

Commercial Certified Applicators Annual Report - Pesticides Used

Certification ID Number	Applicator Name	Applicator Business Registration Number	Reporting Year
12345678	Sensible Software, Inc.	1234565678	1998

Applicator Address: **2 Professional Drive #246** Name of Registered Business: **Sensible Software, Inc.**

Page No. #	EPA Registration Number	Product Name	Quantity Used	Unit	Date	County Code	Property Address	City	Zip Code
	123-10-7890	Parathion 20%	10.0000	GL	0107	99	1733 Westridge	Anytown	55501
	264-480	Chipco 26019 FL	12.0000	FL	0107	99	1733 Westridge	Anytown	55501
	2217-543	Trimec Classic	6.0000	FL	0107	99	1733 Westridge	Anytown	55501
	123-10-7890	Parathion 20%	10.0000	GL	0206	99	1733 Westridge	Anytown	55501
	264-480	Chipco 26019 FL	12.0000	FL	0206	99	1733 Westridge	Anytown	55501
	2217-543	Trimec Classic	6.0000	FL	0206	99	1733 Westridge	Anytown	55501

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