

Comparison Chart of **CLIP** Lite, Classic and Pro

Category	Item	Description	Lite	Classic	Pro
Customer Information	Handle up to 50 Customers		X		
	Handle up to 80 Customers		X		
	Handle up to 125 Customers			X	
	Handle up to 99,999 Customers			X	X
	Property Name and Address	Can be different from the billing name and address	X	X	X
	Billing Name and Address	The name and address that the bill and any correspondence is sent to.	X	X	X
	Phone Numbers for each Customer		2	4	8
	E-mail Address				X
	Credit Limit	A credit limit can be set that will advise you of any excess of this credit limit before you perform another service for a client.		X	X
	R/C Code	Classify your customers by Residential or Commercial		X	X
	Customer Type	Classify your customers by type.		X	X
	Unlimited Notes	Unlimited notes, can be date/time stamped	X	X	X
	MicroSoft Word and Excel Files held with Customer Information	Hold unlimited number of Word or Excel files in your customer record. You can include pictures, graphs, drawings, sound files, video files... These documents are held within CLIP but use the full power of Word and Excel.			X
	Single Document with Customer	One document of unlimited length for each customer record to record the most recent correspondence between the company and the customer.	X	X	X
	Custom Fields (User-Defined)	These are user-defined fields that allow the user to configure his/her data in unique ways.		2	13
	Patterns	Patterns are a quick way to ease data entry processes. They save you a lot of time typing information.		X	X
	Date Stamp for all Notes	The date and time can easily be placed in any note region with one key-stroke.	X	X	X
	Customer Contacts	Other names and addresses that are tied to a customer. These can be used to hold other officers from a Home Owner's Association or just other contacts to keep track of.		2	3
	Jobs per Customer	Each job is a function or service that can be repeated up to 365 times per year.	99	99	9999
	Classify Jobs by Type	Classify your jobs by job type.		X	X
	Unlimited Route Sheet Notes	Route Sheet notes are notes that go out to your foreperson and help them remember the particulars of each customer's desires. These notes can include such things as "Remember to close the gate." or directions to arrive at the property.	X	X	X
	Unlimited Invoice Notes	Invoice Notes are notes that will appear on the customer's invoice/statement when printed. These can be unlimited in length.		X	X
	Unlimited Internal Job Notes	Internal job notes are notes that only the operator of the system can see. These notes can include proprietary information that neither the customer or the foreperson needs to see.		X	X
Job Defaults for new Jobs	Defaults are settings that can be set in the customer's record that will apply to all new jobs added to this customer. These defaults save typing and increase accuracy in data entry.			X	

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Customer Information (Cont.)

		Lite	Classic	Pro
Time in and Time out in History	The time the crew starts and finishes a job will be recorded into history. These times can be seen on the screen while reviewing the history.	X	X	X
Installments	Installments are set amounts the are billed to the customer each and every billing cycle. These can be adjust before-hand to either change or remain the same for any set of months.	X	X	X
Pre-Bill Installments	Some customer's installments can be pre-billed while others are post-billed. This helps automate the billing process even more.			X
Crews supported	Each crew receives a separate route sheet each day the route sheets are printed. The number of crews can be tied to the number of trucks or sets of equipment a company has.	9	9999	9999
Place Customer on hold	You can place a customer's account on hold by changing his status. This will prevent all future schedulings of work for the customer. It will not prevent billings or aging.	X	X	X
Customer Status	This is an indicator of the customer's true status, either Active, On Hold, or Pattern.	X	X	X
Snow Plowing features	These include Global Replacements and other powerful utilities that are necessary for Snow removal operations.		X	X

Recording your Work

		Lite	Classic	Pro
One Key recording of all jobs done	Jobs can be recorded with one key stroke. "Y" if the job is done, "N" if the job is not done. This simple task will post the work to the customer's account, reschedule the job for the next time it should be done, and update all billing information.	X	X	X
Enter start and stop times for all jobs	This allows you to do specific job costing by entering the start and stop times for each job. CLIP tracks these times and calculates the man hours used along with the job costing information.	X	X	X
Calculate Man Hours based on time * Crew Members	Based on the Start and Stop times, CLIP will automatically figure the man hours spent on a job.	X	X	X
Track Foreperson that worked on job site	The initials of the person in charge of this job will be placed into history allowing quick retrieval at a later date.		X	X
Bar Coding the Route Sheets	For use with the RDC, these route sheets include a bar code printed next to each job so that the RDC can read it directly into its memory.		X*	X
Import from Remote Data Collector	CLIP supports the Remote Data Collector (RDC) from Percon. This unit will record the times and jobs that the crews work on. These times can be electronically fed into CLIP so that job costing becomes automatic.		X*	X
Group jobs together for weighted averaging of times.	When recording work for a number of jobs at once, you can group them and assign a start time and stop time to them as a group, CLIP will distribute the time to the various jobs in a weighted calculation.			X
Record notes to the customer while recording your work.	These are one-time notes that the operator can write to the customer concerning this particular service.		X	X
Record single transactions for the customer while recording the work.	Transactions are either one-time debits or credits that can be entered at the time of recording work.		X	X
Skip a job's schedule	This function allows you to not record a job as done and have it skip to the next date or any date specified.		X	X
Add Jobs to today's list that were not scheduled.	If work is done that was not on the schedule, CLIP allows you to add the work into the schedule quickly and easily, allowing you to post it as done with one key-stroke.	X	X	X
One-Time change of Job charge	You can adjust the price on any job while recording the work, effectively allowing you to change the price only once.		X	X

Comparison Chart of **CLIP** Lite, Classic and Pro

Billing

		Lite	Classic	Pro
Print Statements	Print Statements with one click of a button	X	X	X
Print Invoices	Print Invoices that are created on the fly. These invoices are printed using the "Balance Forward" billing system. The invoice numbers are coded to allow the user to know what services are being referred to.	X	X	X
Balance Forward Billing	The ability to use a balance forward system of billing where each customer's statement begins with a previous balance, lists all the activity for the current billing period and ends with a new balance to be used for the current period.	X	X	X
	This system of billing is usually the easiest for Service industry companies and their customers. It is very much like the system used by the phone company and by Credit Card billing services.			
Open Invoice Billing	The ability to use "true" invoices and apply payment to open invoices.			X*
Service Charges - Late Fees	Automatically apply service charges to overdue accounts. Either as a fixed dollar amount or as a percent of the overdue amount.		X	X
Individual Service Charge Options	The ability to turn off certain customers from generating a service charge		X	X
Credit Limit	A credit limit can be set that will advise you of any excess of this credit limit before you perform another service for a client.		X	X
Print Route Sheet Invoices	These are invoices created before the crews go out to do the work. These invoices are used when payment is expected from the client at the time of service.		X	X
Service Notice	You can print out notices that explain the service you just performed on the property. These notices do not include any financial information.		X	X
Print Service Tickets	Service Tickets are three part forms that the crews can take out with them to the jobs they are doing. One part stays with the worker, one part is returned by the customer with payment, one part is retained by the customer for his own records.			X
Sort Route Sheet Invoice by three different criteria	Pre-Sort your Route Sheet Invoices by Crew, Route; by Date, Crew, Route; or by Crew, Route, Day			X
Print Marketing Information on Bills	The ability to print up to three lines of text that help you sell more services to your current customers.	X	X	X
See and Print the customer's billing history		X	X	X
Overdue Reports	These are reports that are printed to let you know what customers are overdue of in arrears with their payment.	X	X	X
Overdue Notices on Route Sheets	These are indicators that tell you that the customer is overdue before you perform work for that customer.	X	X	X
See Receivables Status	The Accounts Receivable Status Report allows you to see your accounts receivables sorted by current, over 30, over 60 and over 90.	X	X	X
Graph Receivables	CLIP will graph your receivables in a pie graph.			X
Graph Customer mix	CLIP can graph your Residential/Commercial customer mix.			X
Print Overdue Letters	CLIP can print your overdue letters specifying the account information on the footer of the letter.	X	X	X
Re-Print previous period Statements	You can re-print statements from previous periods.			X

Comparison Chart of **CLIP** Lite, Classic and Pro

Billing (Cont.)

		Lite	Classic	Pro
Reports on each number in the Company Status Report	You can see specific reports for each accounting number in the Company Status report. If you are wondering what customers comprise the Over 90 column, just press a button to see a report!			X
Sales Tax handling of over 999 Tax Areas	You can set up over 999 different tax areas with two tax rates for each area.	X	X	X
Print Tax Report for use with State Agency	CLIP prints a tax report for each tax area that you use, showing you the taxable debits, non-taxable debits, and the total tax owed for each jurisdiction.	X	X	X
Print on Plain Paper	Print statements on plain paper	X	X	X
Print on Forms	You can choose from up to 6 different forms printed by NEBS specifically for CLIP. These forms can be pre-printed with your name and logo.	X	X	X
Installments automatically applied for the same or different amounts per month.	Installments for customers can be automatically applied each billing period. These installments do not need to be the same for each month.	X	X	X
Posting checks, automatically applies to the oldest debits first.	CLIP automatically applies checks received to the oldest balance first.	X	X	X
Pre-Sort the items on the statements before billing.	CLIP can pre-sort the items on the statement/invoice by date to make it easier for your customers to read.			X
Automatic Aging on Statements	CLIP will age your accounts automatically, keeping you informed of any overdue amount before you do more work for the customer.	X	X	X
Up to the minute balance and overdue reports	All accounting reports are "live" and up to the minute.	X	X	X

Scheduling

		Lite	Classic	Pro
Schedule once a week	CLIP will reschedule your job for the day that is selected in the "Day of the Week" field.	X	X	X
Schedule Bi-Weekly	CLIP will skip one week and then reschedule your job for the day that is selected in the "Day of the Week" field in the following week.		X	X
Schedule by Minimum days			X	X
Schedule for Once a Year	The job will be rescheduled for the next year with the same specifications after it has been recorded as done.			X
Schedule One Time Only	As soon as the job is posted as done, CLIP will place the job on hold.	X	X	X
Specify Day of the Week	This option is used to schedule a job for a specific day or days of the week. You may check all days if it does not matter which day the job is to be done.	X	X	X
Specify Week of the Month	Allows you to specify within which week of the month a job must be completed.			X
Specify Month of the Year	Allows you to specify within which month of the year a job must be completed.			X
Specify Countdown	Used to limit the number of times this job will appear on your route sheets. When the limit is reached, this job will be placed on hold. A countdown of 999 essential turns this function off.		X	X
Specify Relation to Other Jobs	If a job is to be performed only in connection with another job, i.e. edging, you can specify that the job only appear on your route sheets when the other job is due.		X	X
Specify Starting Date	If a customer requests that your services begin on a specific date use this option and the job will not appear on your route sheets until the specified date arrives.	X	X	X
Handle up to 99 jobs per customer	Each job is a separate scheduled function on the property. If a function or job is to be performed 45 times in a year, it only takes up one job. Each customer can have their own set of 99 different jobs from any other customer.	X	X	
Handle up to 9999 jobs per customer	Each customer can have up to 9,999 jobs.			X

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Scheduling (Cont.)

		Lite	Classic	Pro
Check future schedules from the Job Screen	Quickly check your scheduled jobs for specific days to evaluate your workload. When Mrs. Smith calls and wants to know if you can reschedule her for another day, you can both accurately and quickly assess your ability to do so.			X
See Work Projections for Customer	Work Projections is a look into the future schedule.	X	X	X
See Work Projections by Day	You can see your projections listed for each day.	X	X	X
See Work Projections by Calendar	You can see your projections listed in Calendar form.		X	X
Minimum and Maximum Jobs per year	These fields are used to keep track of the number of times a specific job has been performed for contract customers. Minimum is the minimum amount of times you have agreed to perform this job for the duration of the contract.		X	X
	Maximum is the maximum amount you've agreed to perform the job for the duration of the contract.			
Charge to contract customers over Maximum allotted visits.	After you have visited a property and performed a specific job more times than what you have indicated in the "Maximum" jobs per contract field, CLIP charge the amount you specified in this field. This is a great function for Snow Plow services.		X	X
Visits to date	CLIP will display the number of times you have visited the customer's property and performed a specific job.	X	X	X
Charge per hour	If you bill a particular job by the hour rather than by the visit, place the dollars per hour charged in this field. This field is particularly important with contract customers as a record of the actual value of each visit.		X	X
Place jobs on hold	You can deactivate a job and prevent it from appearing on your route sheets by placing it on hold. This is useful for jobs that are done on an "on-call" basis, or for customers who are late in payment.	X	X	X
Automatic Scheduling	Jobs are scheduled according to a starting date and the minimum number of days between visits that the customer will tolerate.	X	X	X
	For example, when a job is completed, CLIP counts forward by your specified number of days, searches for the day of the week you indicated the work should be performed on and reschedules it for that date.			
Delayed Jobs tagged	Any delayed jobs will be indicated on the route sheets.	X	X	X
Handle Rain Days and holidays	Any jobs not completed because of rain or any other reason are automatically held over to the next day's work. They are placed on the Route Sheet in Geographical order unless otherwise specified.	X	X	X

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Routing

		Lite	Classic	Pro
Routing Sequence Numbers	A numerical system the operator uses to assign route numbers the jobs. This system allows CLIP to choose the best route for each day.	X	X	X
Map Location in each Job	A notation area for the operator to enter the map coordinates for each job.	X	X	X
Link to Microsoft Streets Plus	An export function that exports a file of all the jobs for each day to Microsoft Streets Plus, allowing it to plot the position of each job for the day.			X
Link to DeLorme Atlas 5	An export function that exports a file of all the jobs for each day to DeLorme Atlas 5.			X
Sort Route Sheets by Days Late	A function that allows you to place the Delayed work on top.			X
Sort Route Sheets by Property name	A function that allows you to sort the day's work alphabetically by property name.			X
Multiple Route Sheet Headers	This function allows you to assign multiple route sheet headers to each route sheet. Each crew can have a different header.			X
Edit the jobs in the Route List	A function that allows you to permanently edit your jobs from within the Crew and Route List report.			X
Renumber the Route Numbers	A function that allows you to spread out your routing numbers to allow for company growth.		X	X
Print Route Sheets and Work Orders	Route Sheets are printed for each crew for each day. All jobs due on that day appear on the route sheet in geographical order unless otherwise specified. The specific notes for each job are included on the route sheets.	X	X	X

Job Costing

		Lite	Classic	Pro
Average Time on every Job	CLIP will track the average time it has been taking to perform each job. This time is gathered from entering the start and stop time for each job.	X	X	X
Average Dollars/hour historical display	CLIP can display a historic dollars/hour grid.		X	X
Average Dollars/hour Graph	CLIP can display graphs that show you the dollars per hour of any job historically.			X
Budgeted Man hours	CLIP keeps track of your budgeted man hours, comparing them to the actual man hours.	X	X	X
Job Costing Report based on Dollars billed/hours spent.	The job costing reports in CLIP are quite extensive and include the historical job costing as well as the average time and actual times. These times are divided out to show you a true Dollar per hour figure for each job for each customer.	X	X	X
Average Dollars per hour report for Contract Customers based on Installments billed/hours spent.	When dealing with contract customers, the job costing report can compare the hours spent on a property with the contract installments charged. This gives you true cost accounting for your contract customer.			X
Contract Comparison Report	This report will compare your budgeted charges with the actual installments billed to see if your budget is correct for contract jobs.			X
Dollars per hour display on every job recorded as done.	The dollars per hour are displayed on each job as you record it as done.			X
Dollars per hour display for every set of jobs recorded.	The dollars per hour are displayed for all the jobs as you record them as done in batch.			X
Calculator for Contract Jobs	A calculator on the Job Details Screen helps you to budget the charge per job for contract jobs.		X	X
Recording Travel Time	Travel time between jobs is tracked and included in the job costing report.			X
Sort customers by Dollars/Hour	The Job Costing Report will sort your customers by dollars per hour so that you can quickly identify which properties are the lowest and need to be re-bid.			X

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Estimating

		Lite	Classic	Pro
Unlimited Estimate Name and addresses	You can store unlimited number of Estimate names and addresses.		X	X
Unlimited Estimates per name	You can have unlimited number of Estimates per Estimate name and address.		X	X
Estimate Analysis	You can analyze the effectiveness of your advertising.		X	X
Close Ratio Analysis	You can analyze the effectiveness of each sales person in closing the estimate.		X	X
Estimator follow up and analysis	You can see how many estimates are outstanding, how many are approved, how many days between estimate request and estimate writing.		X	X
Unlimited Estimate Forms	You can have unlimited Estimate forms to help create new estimates for each Address.		X	X
Estimate Tracking	You can track each stage of an estimate.		X	X
Reports on Estimates outstanding	You can see what estimates are outstanding and need a call back.		X	X
Report on Estimates given	You can see how many estimates have been given.		X	X
Report on Estimates approved	You can see how many estimates have been approved.		X	X
Track all advertising methods	You can track all estimate advertising methods and effectiveness.		X	X

Reports

		Lite	Classic	Pro
Customer List	Customer List, either alphabetical or by customer number.	X	X	X
History Report	A report for each customer detailing their history.		X	X
Customer Account Status	A report the shows you each customer's account status with a breakdown of the aging.	X	X	X
Crew/Route Report	A report that shows you the routing sequence order of your properties.	X	X	X
Job Costing Report	A report that details the amount of time you have spent on a job and the dollars it has generated.	X	X	X
Work Projections	A report that shows you the scheduling for any future period.	X	X	X
Summary/Detail of Today's work	A report of what is due to be done today	X	X	X
Summary/Detail of Tomorrow's work	A report on what is due for tomorrow	X	X	X
Summary/Detail of Next Week's work	A report on what is due next week	X	X	X
Summary/Detail of work between dates	A report on what is due between any given dates	X	X	X
Display by day		X	X	X
Display by Customer			X	X
Display by Calendar			X	X
Sales Tax Report	A report that details all the taxable amounts that have been entered into the system since the beginning of this billing period, with the sales tax charged.	X	X	X
Customers on Hold	A report on all customers that are on hold.		X	X
Overdue contact report	A report that details the customer's account status and also gives you the phone numbers and other pertinent information for collection purposes.	X	X	X
Accounts Receivable Analysis	A report that details the break down of what and who is Current, over 30, over 60, or over 90 days delayed in payment.	X	X	X
Daily Grosses	A report that details the man hours and amount charged recorded on each day that work is posted.		X	X
Estimates requested/given/approved	A report to help you manage your estimates more precisely.		X	X

Comparison Chart of **CLIP** Lite, Classic and Pro

Reports (Cont.)

		Lite	Classic	Pro
Sales by Job Type Report	A report that details the charges by their type or job name. This report gives you the ability to see where your income is being generated.		X	X
Company Status	A report that tells you the current, 30, 60 and 90 day amounts, the credits received and applied, the current debits along with other pertinent company information.	X	X	X
Merge for Proposals	This function will convert the relational data bases in CLIP to a flat file for use with a word processor to create proposals that detail past work for a customer.		X	X
Labels	A report that can output labels to be used in mailings.		X	X
Only Credit and Debit Reports	A history report, similar to a checking account statement that details the credits and debits in a customer's history do help resolve customer questions.			X
Virtually Unlimited Reports. (User defined reports)	A very powerful report generating system that allows the user to make up his own reports using menus and pull downs to guide the user through the process of choosing the fields, condition, sort and report options.		X	X
	This function can also export information to other windows programs.			

Customer Base

		Lite	Classic	Pro
Handle up to 50 Customers		X		
Handle up to 80 Customers		X		
Handle up to 125 Customers			X	
Handle up to 99,999 Customers			X	X

Links

		Lite	Classic	Pro
Link to QuickBooks	A module that transfers Accounts Receivable summary data from CLIP to QuickBooks. This function allows you to use double entry accounting within CLIP.		X*	X*
Link to SBT	A module that transfers Accounts Receivable summary data from CLIP to the SBT account system. This function allows you to use double entry accounting within CLIP.		X*	X*
Link to Microsoft Streets Plus	An export function that exports the names and address for today's work to a file that is suitable for importing to Microsoft Streets Plus to allow you to plot the day's route on a map.			X
Link to DeLorme Atlas 5	An export function that exports the names and address for today's work to a file that is suitable for importing to DeLorme Atlas 5 to allow you to plot the day's route on a map.			X
Link to Excel	A function that allows you to keep Excel Worksheets inside of CLIP tied to the customer for which they were created.			X
Link to Word	A function that allows you to keep Word Documents inside of CLIP tied to the customer for which they were created.			X
Export to Word for Mailmerging	Various functions that allow exporting to Microsoft Word for mailmerging purposes.		X	X
Import from the Remote Data Collector	A function that allows you to import directly from a Remote Data Collector into CLIP. The Remote Data Collector will record the work as done and record the start and stop times while in the field.		X*	X
Export to Word for Labels	Various functions that allow exporting to Microsoft Word for labeling purposes.		X	X

Comparison Chart of *CLIP* Lite, Classic and Pro

Global Functions

		Lite	Classic	Pro
Replace Information Globally	A powerful function that allows you to manipulate and change your data masively and easily.		X	X
Adjust Prices Globally	A powerful function that allows you to change prices based on conditions that you stipulate.			X
Renumber Routing Numbers	A powerful function that changes your routing sequence numbers to allow for more growth.		X	X
Renumber the Job Numbers	A powerful function that allows you to change your job numbers for better consistency and uniformity.			X
Year 2000 support	Support for the coming century that allows you to schedule work into the next century without problems.	X	X	X
Electronic - On Line Help	A system that allows you to search the documentation, print the documentation and find answers quickly and easily.	X	X	X

Operating System

		Lite	Classic	Pro
Windows 3.1		X	X	
Windows 95		X	X	X
Windows NT		X	X	X
Multi-User up to 5 stations			X	X
Multi-User up to 10 stations				X
Multi-User greater than 10 Stations				X

Security

		Lite	Classic	Pro
Password System	A system that allows you to restrict access to parts of CLIP by assigning passwords and restrictions.		X	X

Free Technical Support

		Lite	Classic	Pro
Phone Technical Support	800 number Tech. Support over the phone. Usually a call back within one hour, guaranteed call back the same day for all calls placed before 4:30pm ET.	1 Hour/ 1 year	2 Hours/ 1 year	3 Hours/ 1 year

Specifications subject to change without notice. 11/15/97

* An asterisk indicates that this function will require an optional module.