

# Materials in Job

08/23/2011

## Quick Start guide

**\*\*If you do not have the Projects Module for CLIPxe, some screenshots below may have more options than the windows inside of your copy of CLIPxe\*\***

Purpose of this function:

1. Help with pricing and estimating a new job
2. Maintain a record of the materials and labor used on a job
3. Please note that the Materials are not billable and do not show on the bill if you bill from CLIP. If you use qCLIP you have the option to send these over to Quick Books for billing.

You can enter both Labor type items and materials. Normally most people only use it for material tracking. You can set up labor if you want to use this to assist in estimating as described later in this manual.

## Setup and Use

The Materials/JobCosts tab on Jobs can be used to hold the parts and labor that goes into a job.

The screenshot shows the 'Materials/Job Costs' window in the CLIPxe software. The window title is 'File Maintenance for customer: TANG, JANET'. The main area is a table with columns: Part Num, Part Name, Track? Qty=Area, Qty, Unit Type, Divisor, Difficulty, Units, Cost Per Unit, Ext. Cost, Price Per U, Ext. Price, and Labor? Profit %. Below the table is a summary section with fields for Charge, Labor, Material, Total Price, Total Cost, Mark Up, Total Units, and Dollars per Unit. The bottom of the window has a status bar with 'Last Job Performed: 07/19/05', a 'Show Active Jobs Only' checkbox, and buttons for 'Create Estimate', 'Edit Estimate Status', and 'Date of last estimate'.

The first thing you must do is to set up your parts and labor.

Click on the **Maintain Materials**  button.

**Name:** Name of the material

**Stock Type:** Most people will use the “Parts” selection for materials

**Qty Type:** What is the item measured in.

**Track:** track this item for the special chemical report

**Labor:** Select if item is labor. If time is selected it adjusts the manhour rating in the job

**QTY=Area** This setting ensures that the quantity will always come from the Area of the job. In other words, when we have a job that is 10,000 square feet, we can add this item and it will figure out the quantity needed automatically.

**Unit Cost:** The cost to us, this will be after the labor burden and overhead. i.e.: if you are paying an employee \$ 11.00/ hour your burden is probably 30% or more depending on the state you live in. If that is the case, we chose the cost of \$15.00.

**Unit Price:** How much are you charging for this item

**Divisor:** The divisor is the answer to the question, “How many square feet can one unit do?” i.e. 1 gallon can do x # of sq feet

**Active Ingredient Multiplier:** This is optional. It used for a particular report that is only used in a few states. You can enter the amount of active ingredient as a decimal that is contained in the Qty. For example if it is applied as Gal you might have .023 active ingredient.

**Unit Meas if Active Ingrid.:** This is optional. It used for a particular report that is only used in a few states. Allows you to define how the active ingredient is measured.

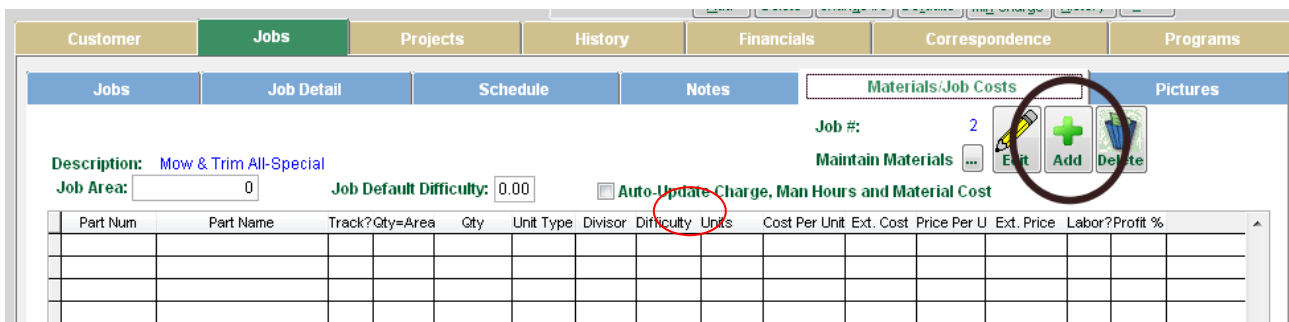
**Item:** You will only have this option if you use qCLIP. Select the Item you want this material coded to.

**Class:** You will only have this option if you use qCLIP. This is only used if you use Class accounting in Quick Books (most companies do not). Select the Class you want this material coded to.

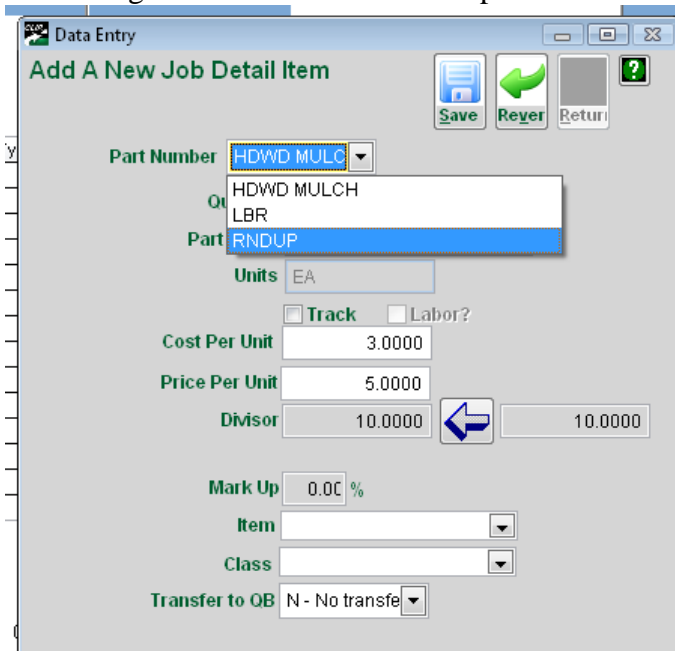
**Transfer to QB:** You will only have this option if you use qCLIP. You can choose to: not to send this over to Quick Books at all, send it to Quick Books and reduce the quantity (useful if you sue QB for inventory) and Bill the material on the customers bill.

Now that our item is set up, we can add it to the job.

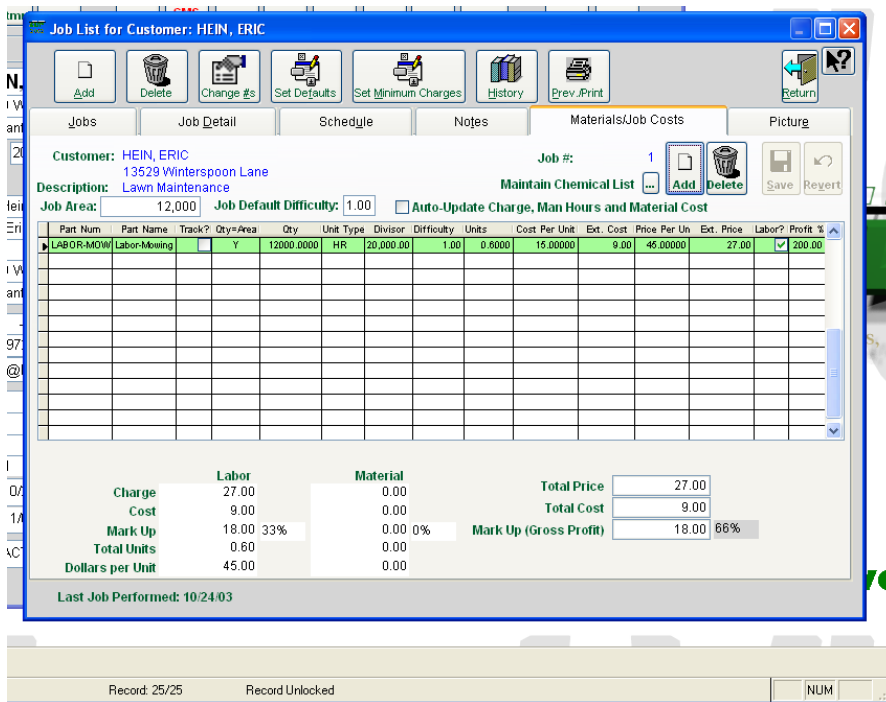
Click on the ADD button.



This will give us the list of available parts and labor.



We can choose the material and it will bring it down into the job.

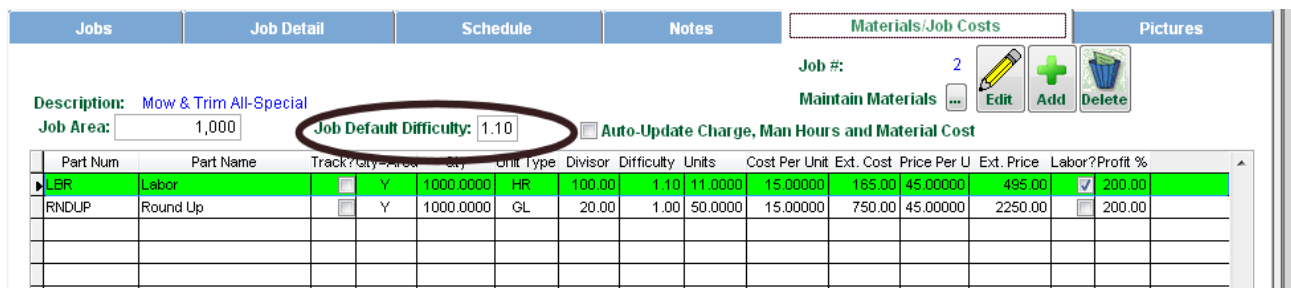


Notice that the first line is already filled in and the price is already there as well. This is because we marked this labor item as being “Qty = Area” so that CLIP is reading the sqft in the job area and dividing that by the divisor to arrive at .Qty.. Multiply that by Price Per Unit and you will have the price for the job. This is all done automatically.

The Profit column is arrived at by using the following formula:  

$$\frac{(\text{Extended Price} - \text{Extended Cost})}{\text{Extended Cost}}$$

Now, if we think that this particular property is more difficult than the average, we can add a difficulty factor of 1.10, meaning that it is 10% harder than a normal job.



This raises the factors, from the cost all the way through to the price.

You can use the difficulty factor to lower the price as well, simply enter a .9 or .8 to subtract 10% or 20% respectively.

## Using the Auto-Update function.

The screenshot shows a software interface with a top navigation bar containing 'Customer', 'Jobs', 'Projects', 'History', 'Financials', 'Correspondence', and 'Programs'. Below this is a sub-navigation bar with 'Jobs', 'Job Detail', 'Schedule', 'Notes', 'Materials/Job Costs', and 'Pictures'. The 'Jobs' section is active, showing 'Job #:' 2 and 'Description: Mow & Trim All-Special'. A checkbox labeled 'Auto-Update Charge, Man Hours and Material Cost' is checked and circled in red. Below this is a table with columns: Part Num, Part Name, Track?Qty=Area, Qty, Unit Type, Divisor, Difficulty, Units, Cost Per Unit, Ext. Cost, Price Per U, Ext. Price, Labor?Profit %.

Part Num	Part Name	Track?Qty=Area	Qty	Unit Type	Divisor	Difficulty	Units	Cost Per Unit	Ext. Cost	Price Per U	Ext. Price	Labor?Profit %
LBR	Labor	Y	1000.0000	HR	100.00	1.10	11.0000	15.00000	165.00	45.00000	495.00	200.00
RNDUP	Round Up	Y	1000.0000	GL	20.00	1.00	50.0000	15.00000	750.00	45.00000	2250.00	200.00

If the Auto-Update function is checked, CLIP will automatically update the Charge per Job, the Man Hours and the Material Cost fields.

This makes it extremely simple for the user to add the parts and labor that you want and then when you SAVE the information, the charge, man hours and material cost are updated automatically.

The screenshot shows a software interface for 'File Maintenance for customer: TANG, JANET'. It includes a top navigation bar and a sub-navigation bar. The 'Job Detail' section is active, showing 'Job #:' 2, 'Job Description: Mow & Trim All-Special', 'Job Category: Mowing', and 'Job SubCategory:'. A 'Job Change' dialog box is open, showing fields for 'Min', 'Max', 'Due to Dte', and 'Chrg. Ovr Max'. The 'Charge per Job' field is circled in red and shows a value of 20.00. Other fields in the dialog include 'Man Hour Rating' (0.75), 'Charge Per Hour' (40.00), and 'Job Area' (1,000.000).

You can change the Job Area and it will change the amounts automatically.

# Using Materials in Jobs to Calculate Prices.

## Setup the Pattern Job(s)

In order to get the most out of this function, we need to set up the pattern job to do a lot of work for us. Select Pattern Jobs icon from the main screen of CLIP



Choose the job you want to add materials to..

Jobs	Job Detail	Schedule	Notes	Materials/JOB Costs								
Number	Description	Next Visit	Last	Schedule	Freq	Crew	Route	Related	Bill	Type	On Hold	M
1	Lawn Maintenance	04/07/10	/ /	N		4	1	0	0	Per Service [S]	N	
1	Lawn Maintenance - Bi Weekly/Call In	04/21/08	/ /	N		11	1	0		Per Service [S]	N	
2	Mow & Trim All-Special	04/01/10	/ /	O		4	1	1	0	Per Service [S]	Y	
3	Bush Trimming	04/15/05	/ /	N		7	2	10	0	Per Service [S]	N	
4	Installing Plastic edging	02/20/08	/ /	N		7	1	10	0	Per Service [S]	N	
5	Catch and Bag Clippings	05/14/09	/ /	O		4	3	10		Per Service [S]	N	
6	Seasonal Color Installation	02/20/08	/ /	O		4	9999	10		Per Service [S]	N	
14	Spring Clean Up	04/15/05	/ /	O		7	2	0	0	Per Service [S]	Y	
15	Spring Clean Up with Mulching	04/03/07	/ /	O		7	2	0	0	Per Service [S]	Y	
16	Weeding	02/20/08	/ /	N		7	1	10	0	Per Service [S]	N	
17	Leaf Clean Up	11/29/07	/ /	N		4	1	10	0	Time and Ma	Y	
18	Recycle Bags	10/13/03	/ /	N		1	1	10	17	Per Service [S]	Y	
19	General Clean Up	06/12/07	/ /	O		7	1	0	0	Per Service [S]	N	
20	Estimate	05/01/08	/ /	O		7	20	0	0	Per Service [S]	N	
21	Fall Cleanup	02/20/08	/ /	O		4	9999	10		Per Service [S]	N	

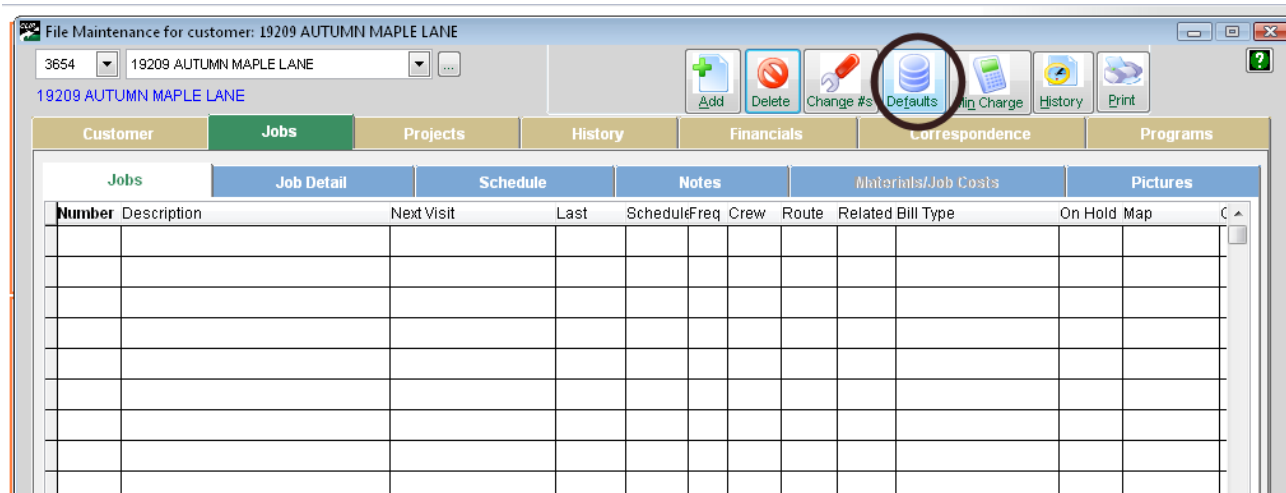
Let's set up the Materials/Job Costs tab on the pattern job:  
Add the material you want



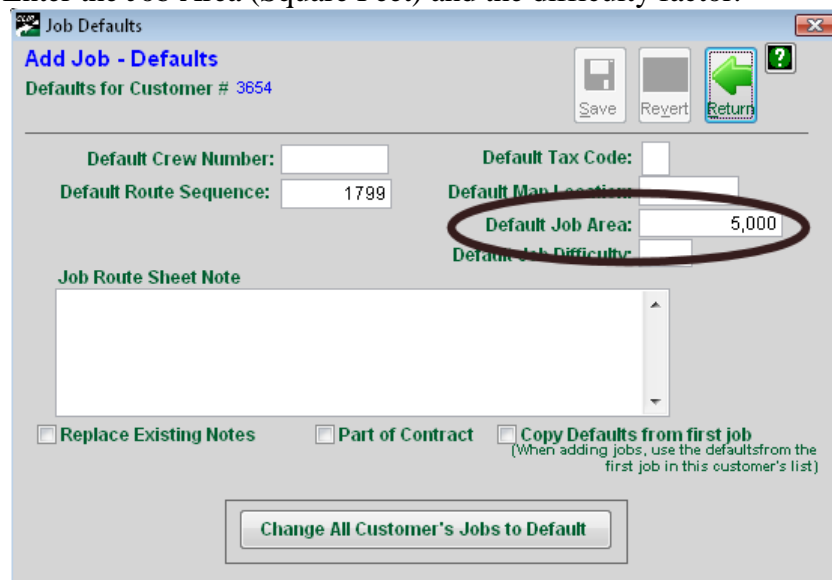
## Getting ready to add a job to a customer

When you have a new customer, enter the information on the front screen first. When you are done, click on the Jobs button.

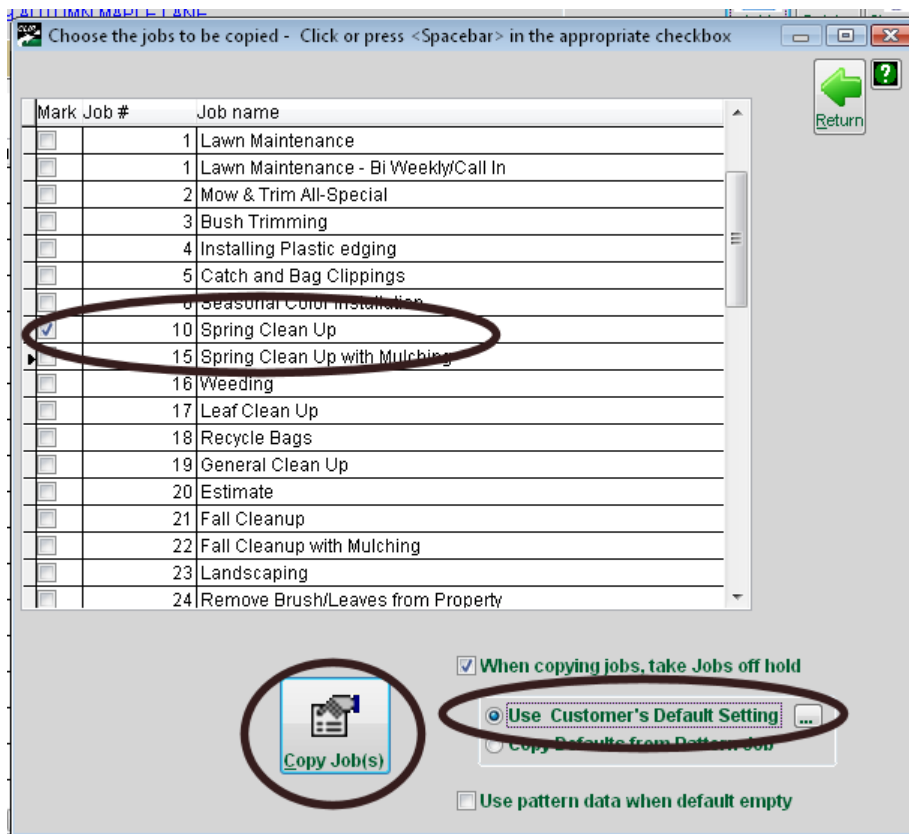
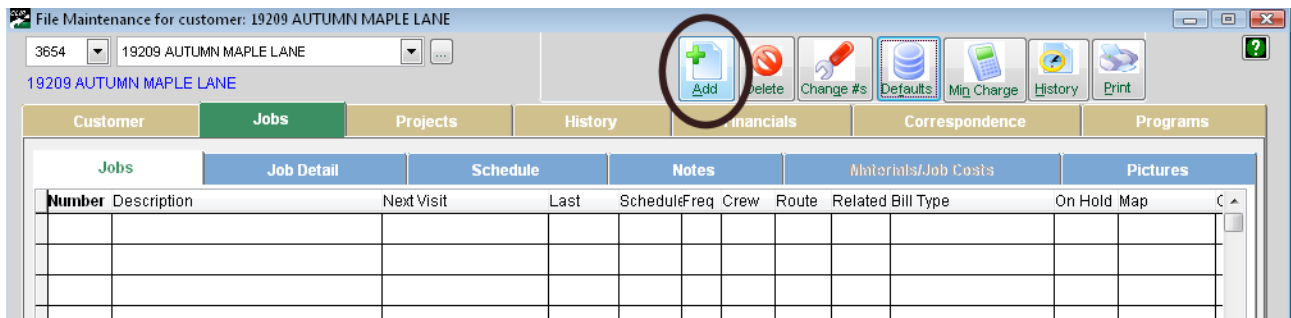
Then, click on the Defaults button:



Enter the Job Area (Square Feet) and the difficulty factor.

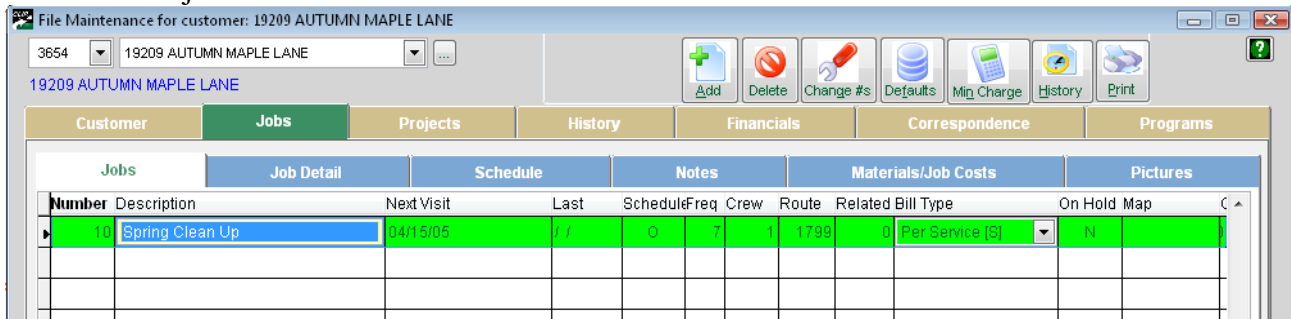


Now Add a job from the pattern customer.



Add the job by checking on the “Mark” column and clicking on the “Copy Job(s)” button.

Now the new job will come into the new customer’s list.



Notice that the price is already filled in.

If the item was marked as Labor the Man hours would also be filled in as well.

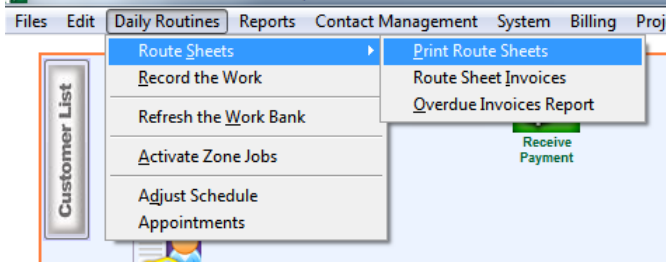
Some uses for this can be:

1. Mowing jobs, simply set the area and the price will automatically be figured.
2. Chemical Apps, if you have five rounds and you need to price each one by the square feet, simply set the pattern jobs up correctly and everything else will follow.
3. Small landscape construction jobs such as mulching or edging. Simply use the Area as square feet or linear feet and the price will be automatically figured.

This allows us to quickly price jobs from the area of the job since all of our parts and labor will have the prices updated by the area.

## Printing Route Sheets with the information on it.

From the Daily Routines menu, choose Print Route Sheets.



Choose the Route Sheet w/Materials option.

Print Preview
X

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100%
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H:(0 )  
**ANDRES, CRISTINA**  
 9839 Doctor Perry Road  
 jameville MD 21754  
 W:( ) 781-7231  
 H:(0 )

Done to Date: 4    Min: 28    Max: 30    Cr:    Frequency: 4    Overdue:

**4-1**  
 Inspector: LAST 04/10/03    Next Visit: 11/04/04    ANDRES, CRISTINA  
 Days Delayed: 1    Route: 110    Mileage:    Start:    Done? ( )  
 Stop:    0.66  
 Last Balance: 0.00    Credits: 0.00    Debits: 642.00    Curr Bal.: 542.00    This Job: 26.40    New Balance: 568.40

NOTES: These are the route sheet notes.  
This is the second line with an enter in between.

LABOR

JOB COMPLETED	EMP ID	IN	OUT	FOREMAN

MATERIALS

Part Number	Part Name	QTY	Unit	Units	Units Used
LABOR	Labor	15000.0000	HR	0.6600	n/a

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H:(0 )  
**Edging**  
 Inspector: LAST 04/10/03    Next Visit: 11/01/04    ANDRES, CRISTINA  
 Days Delayed: 366    Route: 120    Mileage:    Start:    Done? ( )  
 Stop:    2.00  
 Last Balance: 0.00    Credits: 0.00    Debits: 642.00    Curr Bal.: 542.00    This Job: 100.00    New Balance: 642.00

**4-10**

NOTES:

LABOR

JOB COMPLETED	EMP ID	IN	OUT	FOREMAN

MATERIALS

Part Number	Part Name	QTY	Unit	Units	Units Used
LABOR	Labor	10000.0000	HR	10.0000	n/a
MULCH	Shredded Hard W	10000.0000	CF	33.3333	

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Done to Date: 1    Min: 28    Max: 30

Cr:    Frequency: 4    Overdue:

Area: 15000

Notice that the materials show up at the bottom and the crew members can fill out how much they have used.

## Recording the work

Recording the materials into the job is simple. From the Record work screen, click on the Chemicals button.

Record Work Subtotals

Mark Work as Done

Esc=Exit

Specific Info. on Job

Customer: CUSTOMER Job # 16-5

123 test drive Part of contract.

Quick Record

Description: Snow Removal Job Change

Start Time: 08:00A

Stop Time: 09:00A

Clock Time: 1.000 (Exact)

Budgeted Mhrs: 110.00

Mhrs This Time: 3.00 (Rounded)

E	In	Out	Mhrs	Comments
S	08:00A	09:00A	1.000	Comments
H	08:00A	09:00A	1.000	Comments
M	08:00A	09:00A	1.000	Comments

Crew #: 100 Foreperson: MADA

Qty This Time: 0.00

Charge Per Hour: 1.00

Recalc? N

Charge This Time: 110.00

Mat. Cost (Chemicals): 0.00

Materials Cost (Jobs): 10.00

\$/Man Hour This time: 33.3333

Posting Date: 01/20/11

Wind Speed (MPH): 65

Weather Condition: PCloudy

Wind Direction: W

Ambient Temperature: 27

Lawn Condition: Needs Water

Default

Material Tracking

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

This will bring you up to the Detail, data entry.

Record Work Subtotals

Mark Work as Done

Esc=Exit

Specific Info. on Job

Materials/Job Costs

Part Num	Part Name	Track?	Qty=Area	Qty	Unit Type	Divisor	Difficulty	Units	Ext. Cost	Price Per Uni	Ext. Price	Labor? Profit %	Cost Per Unit
SALT	SALT	N		4.0000	LB	1.00	1.00	4.00	4.00	2.0000	10.00	100.00	4.0000

Charge Labor Material Total Price 20.00

Cost 0.00 10.00 Total Cost 10.00

Mark Up 0.00 0% 10.00 50% Mark Up (Gross Profit) 10.00

Total Units 0.00 10.00

Dollars per Unit 0.00 2.00

Material Tracking assigned to this job.

Enter the actual units used here.

- For Labor Items, the actual amount used is derived from the time in/time out and number of employees.



# Seeing the materials Used in History.

From the Customer's account, click on History, then click on SEE DETAIL and you will see the detail for the job. Click on the MATERIALS button and you will see the detail information on Job Costing, profit, man hours and such.

The screenshot displays a software window titled "File Maintenance for customer: CUSTOMER". Inside, there is a sub-window "Account Transaction Detail" for Customer # 16 and Job # 5, with a description of "Snow Removal".

Key data points from the form include:

- Date: 01/20/2011
- Time In: 08:00A, Time Out: 09:00A
- Man hrs.: 3.00
- Amount: 0.00, GL Amount: 110.00
- Material Cost: 10.00
- Wind Speed: 65, Ambient Temperature: 27
- Wind Direction: W, Lawn Condition Code: NWAT
- Weather Condition: PCloudy, Lawn Condition Description: (empty)

A "Materials" button is highlighted in the interface. A table showing crew members is also visible:

Emp	In	Out	Travel Hrs
SUSCO, STEVE	08:00A	09:00A	0.00
HUMPRIES, ERIC	08:00A	09:00A	0.00
MADRIGAL, ADAM	08:00A	09:00A	0.00

At the bottom, a list of transactions is shown, with the most recent one highlighted in blue:

Date	Amount	Type	Description
12/21/10	0.00	Note	inspected your lawn for problem weeds. Broadleaf weed control was applied as necessary.
12/21/10	0.00	Note	inspected your lawn for problem weeds. Broadleaf weed control was applied as necessary.
12/21/10	0.00	Note	inspected your lawn for problem weeds. Broadleaf weed control was applied as necessary.
12/21/10	0.00	Note	inspected your lawn for problem weeds. Broadleaf weed control was applied as necessary.
12/09/10	0.00	Debit	Office Gutters
12/09/10	1.00	Debit	Fertilizer Complaint
12/09/10	0.00	Note	test123455
01/20/11	0.00	Debit	Snow Removal