

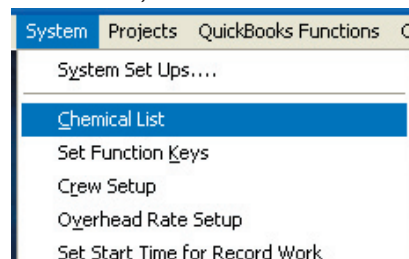
***** Only Pro has this feature *****

Note: Although *CLIP* has a basic chemical tracking feature, we do not recommend the use of it for most companies. This was designed for companies that are located in NY state. NY has some very special requirements that requires the applicator to send a report each year with all chemicals used, on what property and how much. Most states only require that you have this information on hand should they need it. For this, simply use the route sheet footer to record the quantities and chemicals used and save these in a file. Should you get audited, go into the customer history in *CLIP*, find the date of application, then pull the paper from the file with all the information on it. This is by far the most cost effective use of your office time rather than entering every chemical for every job in the computer when you may never be audited.

Setup your chemicals list.

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

From the Systems menu, choose Chemicals>Chemicals List.



The Reporting Information screen will appear. Select the Add button to add chemicals to the Reporting Information screen.

Using the grid enter the EPA number in the Part Num field, the name of the chemical in the Part Name field.

Note: If you do not have an EPA book listing the chemical numbers, contact your local EPA office. Look under the government section in the telephone book and ask for a copy. Some chemical products may even have the EPA number on the package.

Chemical List			
Part Num	Part Name	Qty Type	Actv
PARTNUMPARTNUM	PARTNAME PART N	CY	
ROUND UP	ROUND UP	OZ	
TEST	TEST1	CF	
EA-1234	FUNGICIDE		

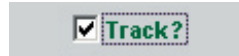
Use the pull down to assign the Qty type. This is the unit measurement of the

Chemical Tracking

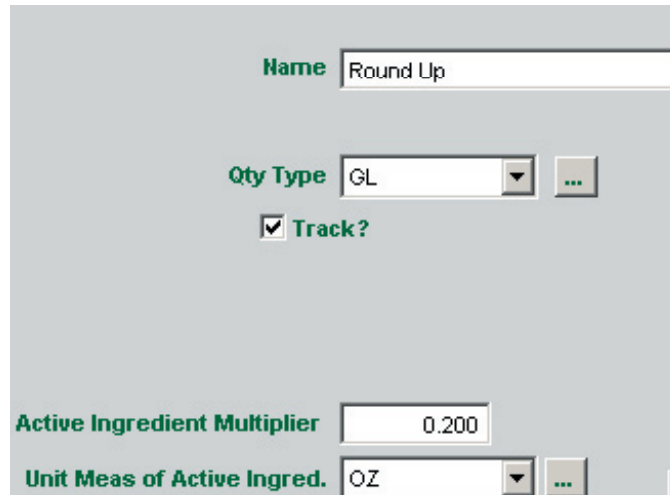
application.(ie pounds, ounces, etc.). Remember this list can be changed at any time by clicking the "..." next to the Qty Type field



Select the "Track" button.



Optional: If you also need to provide the quantity and measurement of the active ingredient then you can fill out the "Active Ingredient Multiplier" and the "Unit Meas of Active Ingred" fields. The following example shows that that Round Up is applied by the Gallon but uses 2oz on Round Up concentrate.



Name: Round Up

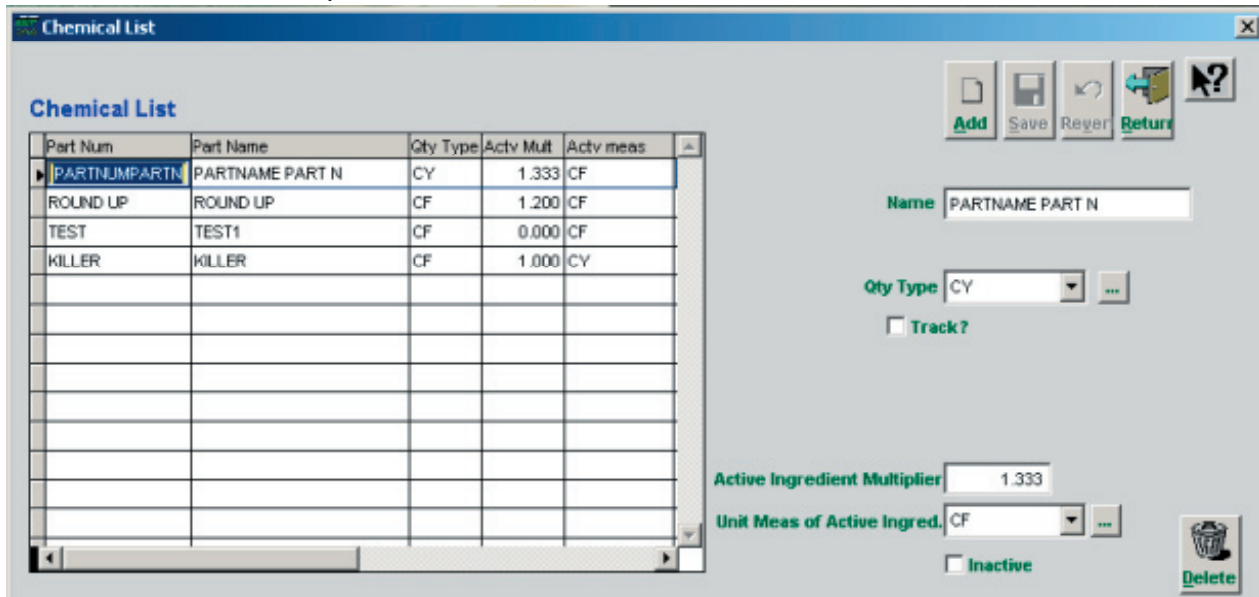
Qty Type: GL

Track?

Active Ingredient Multiplier: 0.200

Unit Meas of Active Ingred.: OZ

When you are finished, the screen should look similar to the one below.



Chemical List

Part Num	Part Name	Qty Type	Actv Mult	Actv meas
PARTNUMPARTN	PARTNAME PART N	CY	1.333	CF
ROUND UP	ROUND UP	CF	1.200	CF
TEST	TEST1	CF	0.000	CF
KILLER	KILLER	CF	1.000	CY

Name: PARTNAME PART N

Qty Type: CY

Track?

Active Ingredient Multiplier: 1.333

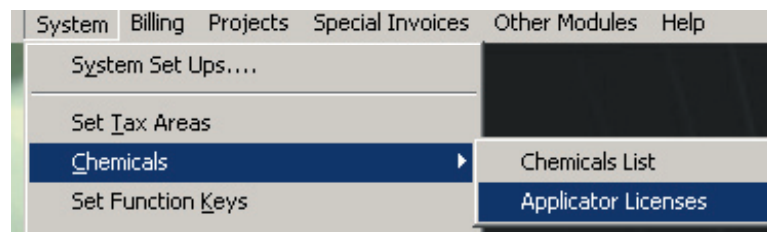
Unit Meas of Active Ingred.: CF

Inactive

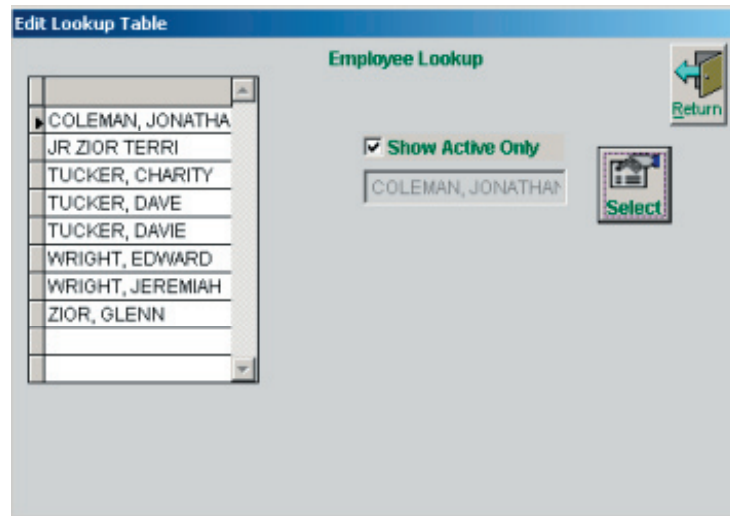
Optional: If you need to show what applicator applied the chemicals for every job then you can set this up. You must first have employees setup in CLIP for this to work

From the Systems menu, choose Chemicals>Applicator Licenses

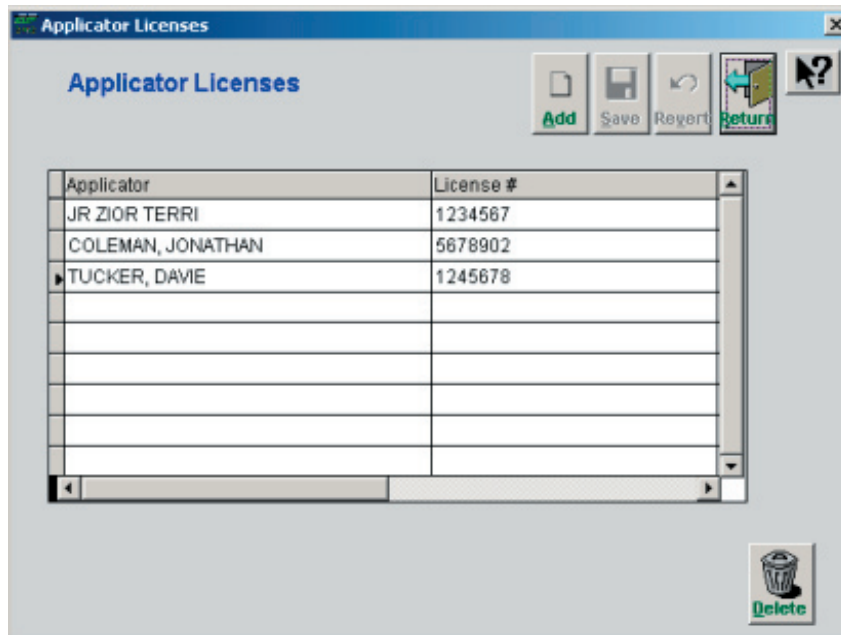
Chemical Tracking



Select Add
Select the employee from the list
Select the "Select button"



Enter in the license number and select "Save"



If you will need have separate chemical usage reports for a particular area or city the customer's county code (Cty Code) must be filled out in the customer record. If you had entered the county code when making the customer patterns or master forms, this information should already be on your customer's form. Spot check several customers to see if this field has been com-

Chemical Tracking

pleted. If not, you have two choices to fill in this information. Bring up every customer's Customer File Maintenance screen and enter their county code in the Cty Code field or use the Replace Information option.

The screenshot shows the 'Customer File Maintenance' window. At the top, there are several icons for different functions: Jobs, Project, History, Billing, Invoic, Bank, CMS, Letter, Name, Phone, and Office. Below these icons, the following information is displayed: Customer Number: 100; Property Name: SCULLY, JIM; Address: 1090 Dexter Rd; City: AK; State\Zip: MI 48103; Tax Id: MI. The 'Cty Code' field is empty and highlighted with a red rectangular box.

The Replace Information option (File > Global Replacement > Replace Information) will automatically fill in this field for all your customers. Be very careful using this procedure and make sure that you make backups before attempting it. For example, if Ann Arbor, MI was in (AK) county, you can fill in the Cty Code field with (AK) for every customer in Ann Arbor, MI by using the Replace Information option.

CHOOSE DATA BASE:

Since the Cty Code field is found on the Customer File Maintenance screen, you would select - Customer.

The 'Choose Data Base' dialog box has two radio buttons. The 'Customer' button is selected (indicated by a filled circle), and the 'Job' button is unselected (indicated by an empty circle).

CHOOSE FIELD:

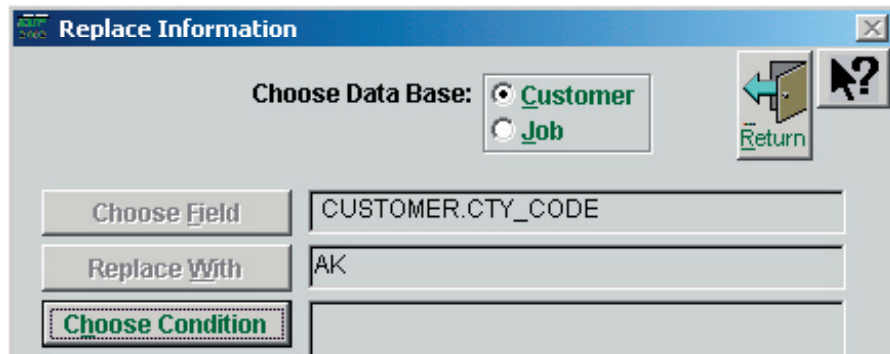
Next, we want to tell the system what to change about the customer's file. Click on the Choose Field button. A list of fields will appear. Since we want to change the County Code, double click on CU. County Code.

The 'Choose Fields' dialog box shows a list of fields. The fields are: CU.Property Zip, CU.County Code, and CU.Billing Name. The 'CU.County Code' field is highlighted with a blue selection bar.

The 'Replace Information' dialog box has two radio buttons: 'Customer' (selected) and 'Job' (unselected). There is a 'Return' button with a left-pointing arrow and a question mark icon. Below the radio buttons, there are two rows. The first row has a 'Choose Field' button and a text field containing 'CUSTOMER.CTY_CODE'. The second row has a 'Replace With' button and an empty text field.

REPLACE WITH:

Next, we want to tell the system to replace the existing county code with a new county code (AK). Select the Replace With button and type in AK.



CHOOSE CONDITION:

Next, we have to tell the system which customers should have their county code changed. Since Ann Arbor is in the county of (AK) MI, we will tell the system to change the county code for all customers in this city. Select Choose Condition button. There are 4 Steps in this screen.

We have to tell the system to change only those customers living in the City of Ann Arbor.

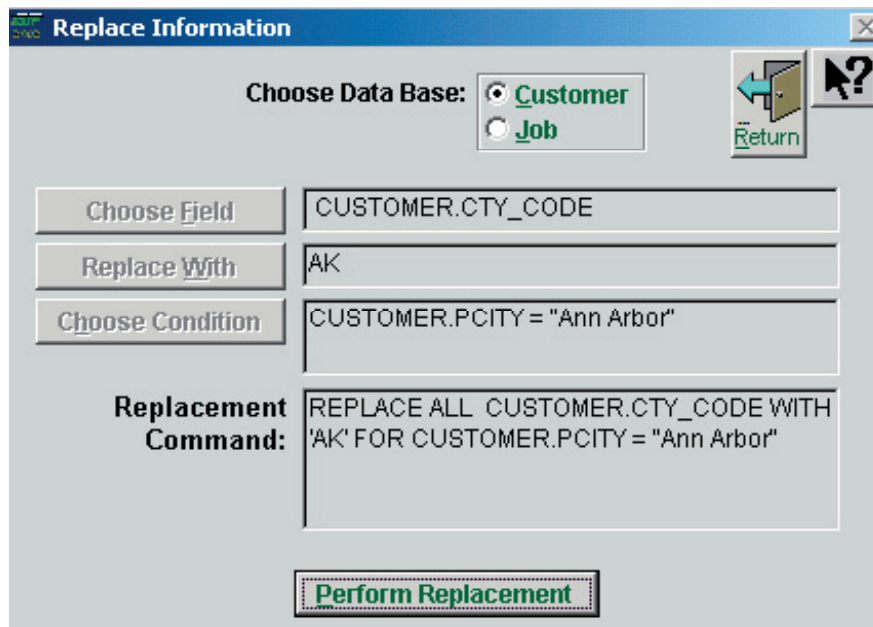
Step 1, double click on CU. Property City.

Step 2, accept the Equals radio button and press Enter.

Step 3, type in Ann Arbor and press Enter.

Step 4, press Enter accept the And radio button.

Then select Use this condition button.



Then select Perform Replacement.

All customers living in Ann Arbor now have the Cty Code as AK. Previously Jim Scully's Cty Code was blank but now his is filled in as AK.

Chemical Tracking

Customer File Maintenance

Customer Number: 100

Property Name: SCULLY, JIM

Address: 1090 Dexter Rd

City: Ann Arbor

State\Zip: MI 48103

Tax Id: MI

City Code: AK

See the *CLIP User's Manual* for more information or call Tech Support if you would like someone to walk you through it. You would do the same procedure for customers in other counties.

Enter the chemicals into the jobs.

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

Select Customer #1 (PATTERN - ANN ARBOR). Next select the Jobs button. Then under the Jobs list, highlight #20 (Early Spring Application).

18	Clean-up Leaves	06/06/03	/ /
20	Early Spring Application	03/15/03	/ /
21	Late Spring Application	05/01/03	/ /
22	Early Summer Application	06/01/03	/ /

Select the Chemicals tab. The following screen will appear.

Customer: PATTERN - GERMANTOWN

Job #: 5

Description: Early Spring Application

Maintain Materials ... Edit Add Delete Save Revert

Part Num	Part Name	Track?	Qty	Qty Type

Select the Add button.

The following screen will appear.

The screenshot shows a software window titled "Data Entry" with a subtitle "Add A New Job Detail Item". The window has a blue header bar with standard window controls (minimize, maximize, close). Below the header, there are four buttons: "Save" (floppy disk icon), "Revert" (undo icon), "Return" (left arrow icon), and a help icon (question mark). The main area contains the following fields:

- Part Number:** A dropdown menu showing "EA-1234".
- Quantity:** A text box containing "10.0000".
- Part Name:** A text box containing "FUNGICIDE".
- Qty Type:** An empty text box.
- Track:** A checked checkbox.

Select the pull down arrow by Part Number to see the list of chemicals you entered in the Reporting Information screen. You can enter the expected quantity. You can adjust the quantity later when you record the work as done.

The check box, Track? (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.

You can enter as many chemicals as needed per job. As you copy these jobs into a customer job list all this information will be pre filled out and you can change the quantity if needed.

Print your Route Sheets or Route Sheet Invoices. If the quantity used is different than the quantity planned to be used, have your employees record the actual chemical quantity used on the job.

Record work – enter the amount used

When recording the the work as done you have two choices. If the quantity used matches the projected quantity there is nothing to do. *CLIP* will record the preset quantity into the jobs history. If the quantity is different from the preset quantity you can record this in Record Work.

When you are in the Record Work Subtotals screen (Daily Routines > Record the Work), you can select the Mark Work as Done button and the Mark Work as Done screen will appear. Next press the "R" key on your keyboard or the "right arrow" on your keyboard to bring up the Specific Info. on Job screen.

Chemical Tracking

Customer: TANG, JENNY Job # 1009-5
13910 Rockingham Rd Part of contract.

Quick Record
Description: Early Spring Application

Start Time: 08:00A
Stop Time: 08:00A
Clock Time: (Exact)

Crew #: 1 Foreperson:
Crew Members:

Charge Per Hour: 0.00
Recalc? N
Calc / Discount
Charge This Time: 0.00

Budgeted Mhrs: 0.00
Mhrs This Time: 0.00 (Rounded)

Materials Cost: 0.00
\$/Man Hour This time: 0.00
Posting Date: 06/06/05

Clinker Credit: -
Debit: -

Material Tracking

Select the Material Tracking button.

This will bring up the Material Tracking screen.

Part Num	Part Name	Track?	Qty	Qty Type
EA-1234	FUNGICIDE	<input checked="" type="checkbox"/>	10.0000	

You can make changes by selecting the chemical and selecting the "Edit" button.

Part Number: EA-1234

Quantity: 10.0000 Qty=Area

Part Name: FUNGICIDE

Qty Type:

Track

You can do this for each customers' job as needed. Post work as normal.

History

Chemical Tracking

To see the chemicals that was recorded go to either:

The Cutomers screen and select the History Icon, select the date of service, select "See Detail", select "Material"

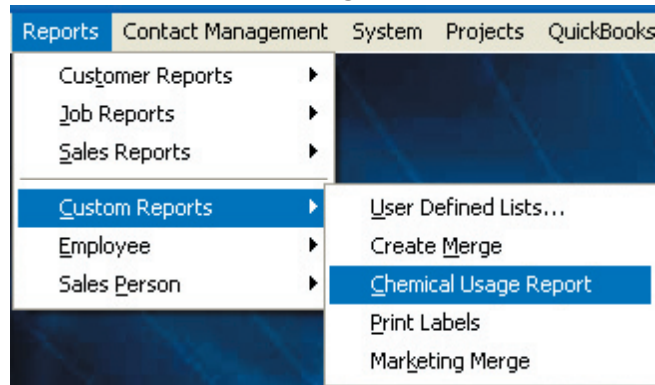
or

The Cutomers screen and select the "Jobs" icon, select the job, select the "History" button, select the "Details" button, select the "Materials" button.

	Part Num	Part Name	Track?	Qty	Qty Type	
▶	ROUND UP	round Up	<input checked="" type="checkbox"/>	20.0000	CF	

Print report

After entering all the data on a day-by-day basis, you will be ready to print the report. The Chemical Tracking Report can be found under Reports > Customer Reports > Chemical Usage Reports.



Chemical Tracking

The screenshot shows a web-based interface for generating a Chemical Tracking Report. The window title is "Chemical Reports" and the main heading is "Chemical Tracking Report".

Filtering Options:

- Flagged records
- Un-Flagged records
- Date Range:**
 - Start with: 01/01/05
 - End with: 05/01/05
- City Code:** (Blank for all)

Sort By:

- Customer
- Cty. Code
- Part Number
- Date

Print Options:

- Show Customer Name

Header Options:

Certification Id #	UNKNOWN
Applicator Name	APPL NAME
Applicator Business Registration No.	UNKNOWN
Reporting Year	1997
Part Number	Part Number
Part Name	Part Name
Quantity	Quantity
Unit	Unit of Measure
Cty. Code	County Code

Applicator Lic# Appl Li

Active Qty Active Qty

Buttons: Return, Help (?), Preview/Print

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.

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

The following is a sample report form produced by the NY DEC for pesticide reporting purposes.

Chemical Tracking

