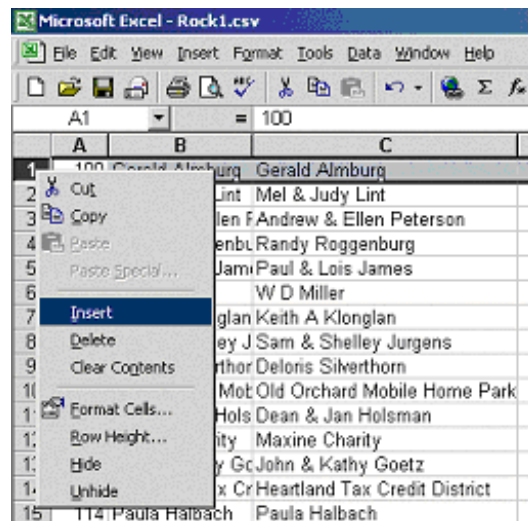


Importing data from Excel

If you have your customers data in an Excel sheet you can import all the main information.

1. Open Excel
2. You will need to get your customers information into the Excel sheet.
3. Insert a blank row above row 1. To do this Right Click your mouse on the number 1 in the upper left hand corner. Then select "Insert"



4. Starting with the column labeled A find the column that has the customer number in.
 - a. If you do not have one from your old data you will need to create one. Do this by right clicking your mouse at the top of the A column and select insert. Then type the word ID in the A1 field. Then in the A2 field type the number 100. In the A3 field type the following formula =sum(A2+1). Then using the small square box in the lower right corner of the A2 field, click and hold down your mouse button and slowly drag the box down the A column until you reach your last customer then let go of the mouse. Now each customer should have it's own number starting with the number 100.
 - b. If you have an existing customer number (must be a number and smaller than 100,000) find the column that it is located in and right click on the letter at the top of the column and select Cut. Then go the column labeled A and right click on the top of the column and select Paste. The numbers should all be in the first column now.
5. You will need to make or move your data into the following columns. Every column must be made even if you don't have any information for it. The columns must be in the exact order as shown. You must put the name of each column across the number 1 row.

Installation - Start Here

Column A= ID (This is the customer number, and it is *mandatory* that a unique number be filled in)

Column B= Property Name (Where the property actually is located. Normally this will be Last name, First name for residential-what the crews will see)

Column C= Bill Name (Use normal name format first & last name)

Column D= Bill Care of (If an extra address line is needed otherwise CLIP will ignore blanks when printing)

Column E= Bill Address (Billing street address)

Column F= Bill City and State (You will need to combine the two fields together if you have them separate. To do this in Excel, move the City to Column X and Move the State to Column Y. In the F2 cell type this formula =X2&" "&Y2. Use the described method above to drag the formula down to all the customers.

Column G= Bill Zip

Column H= Tax ID (This will normally be the same as the State- *This is a mandatory field*)

Column I= Property Address

Column J= Property City

Column K= Property State

Column L= Property Zip

Column M= Home Tele

Column N= Work Tele

Column O= Fax number

Column P= Email Address

Column Q= Credit Limit (This must be a number-if you do not want to use this feature put 99999 in all customers fields)

Column R= Service Charge (This must be either a Capital Y or N- *This is a mandatory field*)

Column S= User Defined Date (Optional: this can be any date that you want to track.)

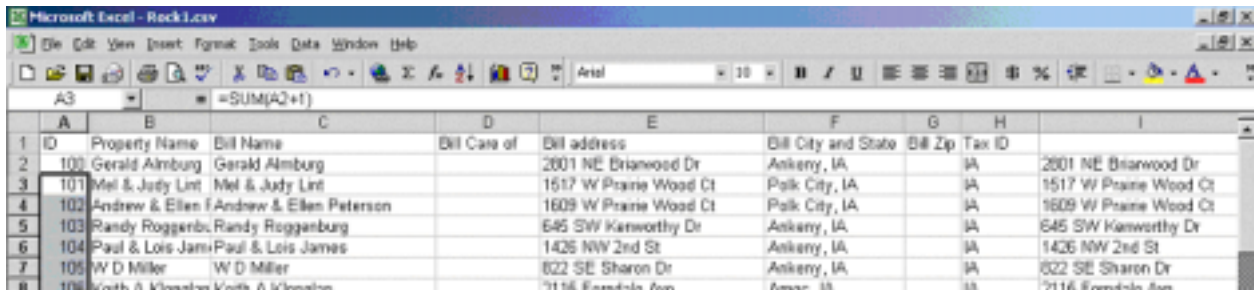
Column T= Custom Characters (Optional info from your Excel sheet that is not cover with one of the other fields- up to 10 characters long)

Installation - Start Here

Column U= Type (Optional to tell what type of customer ie I-irrigation, M=mowing –up to 5 characters long)

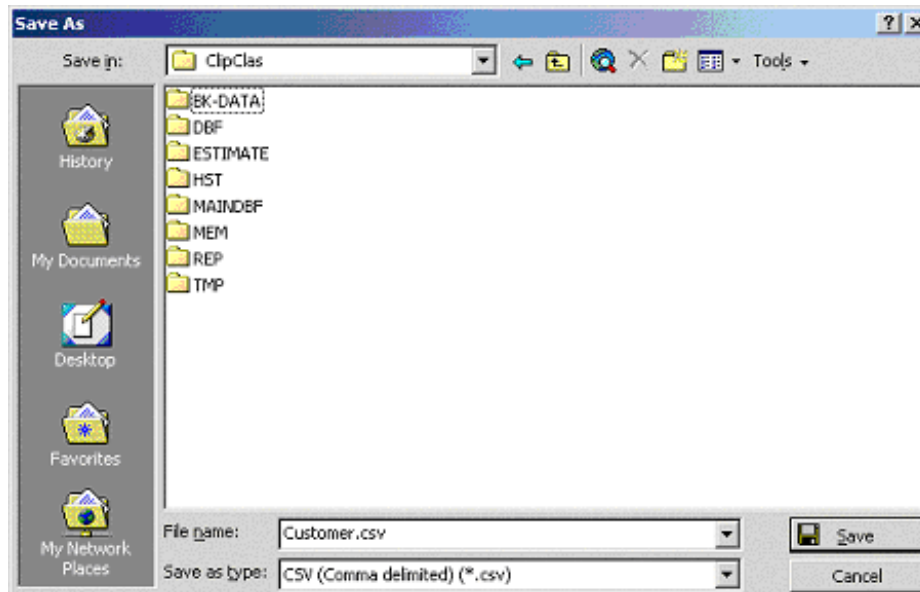
Column V= R or C (Must have either a capitol R or C- *This is a mandatory field*)
A "R" in CLIP means Residential while a "C" means Commercial

Column W= WP Code (Optional info from your excel sheet that is not cover with one of the other fields- up to 10 characters long)



	A	B	C	D	E	F	G	H	I
1	ID	Property Name	Bill Name	Bill Care of	Bill address	Bill City and State	Bill Zip	Tax ID	
2	100	Gerald Almburg	Gerald Almburg		2001 NE Brianwood Dr	Ankeny, IA	IA	2001 NE Brianwood Dr	
3	101	Mel & Judy Lint	Mel & Judy Lint		1517 W Prairie Wood Ct	Polk City, IA	IA	1517 W Prairie Wood Ct	
4	102	Andrew & Ellen	Andrew & Ellen Peterson		1609 W Prairie Wood Ct	Polk City, IA	IA	1609 W Prairie Wood Ct	
5	103	Randy Roggenburg	Randy Roggenburg		645 SW Karworthy Dr	Ankeny, IA	IA	645 SW Karworthy Dr	
6	104	Paul & Lois Jami	Paul & Lois James		1426 NW 2nd St	Ankeny, IA	IA	1426 NW 2nd St	
7	105	W D Miller	W D Miller		822 SE Sharon Dr	Ankeny, IA	IA	822 SE Sharon Dr	
8	106	North A. Knepper	North A. Knepper		7116 Emerald Ave	Ankeny, IA	IA	7116 Emerald Ave	

6. Save the file as a .csv file. Go to File-Save As. At the bottom change the “Save as type” to CSV (comma delimited)(* .csv). Change the name of the file name to customer and save it in the C:\Clipv folder.

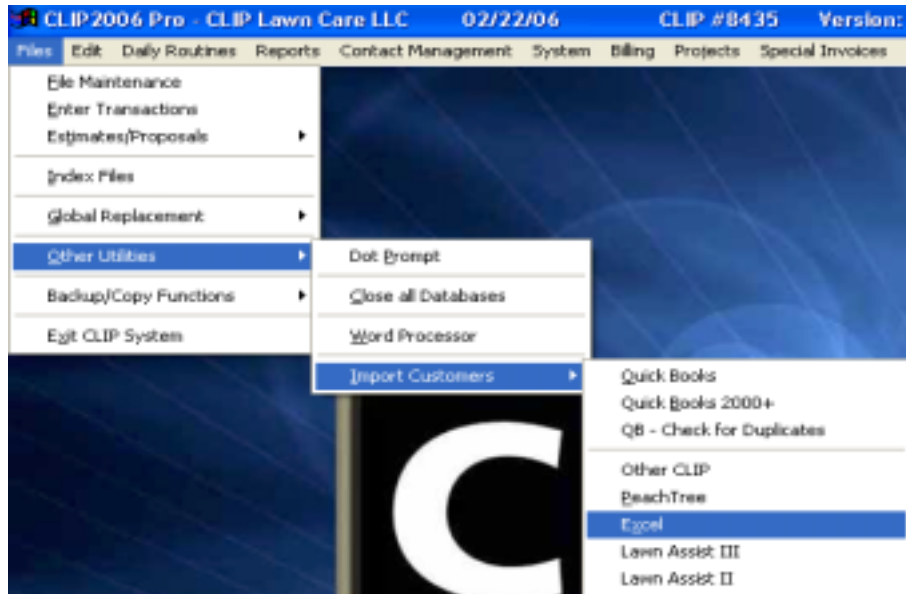


7. Close Excel

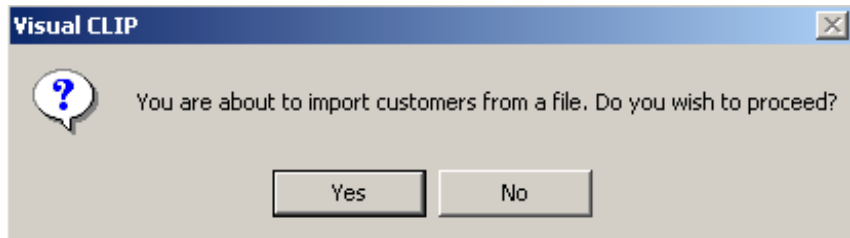
8. Open CLIP

9. Go to Files > Other Utilities > Import Customers > Excel

Installation - Start Here

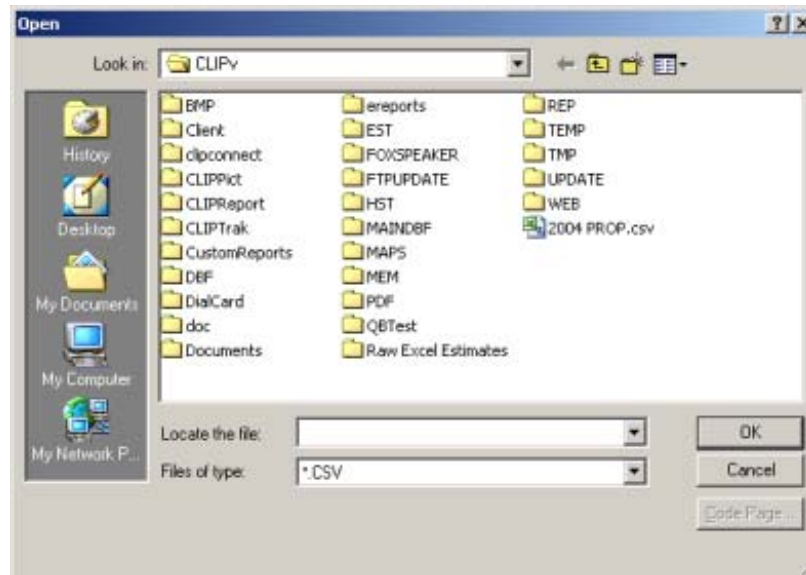


10. Select "Yes"



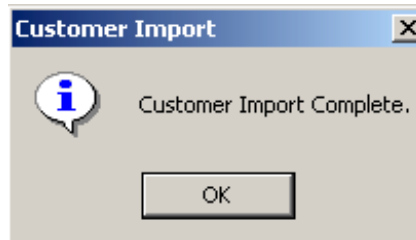
11. Locate the Excel file you made

VisualCLIP



12. Select "OK"

13. CLIP will start the import process. Depending on how many customers you have will determine how long it will take.



14. Go into File Maintenance and check the data. If any data are in the wrong places you will either need to go through and manually correct it or you will need to correct the excel sheet. If this was a new **CLIP** just installed, erase and reinstall the **CLIP** program then run the import program again. If you were adding customers to a copy that already has information in it you will need to restore your back up and rerun the import process.

Tips for New Users—Keyboard Usage, Conventions and Terms

If you are already familiar with the Windows Operating system, you can proceed to the next chapter. If you are new to computers and software, please take a few minutes to read the following. It will help you understand the rest of this manual.

Special keys

The <Enter> key is the same as the <Return> key on some keyboards.