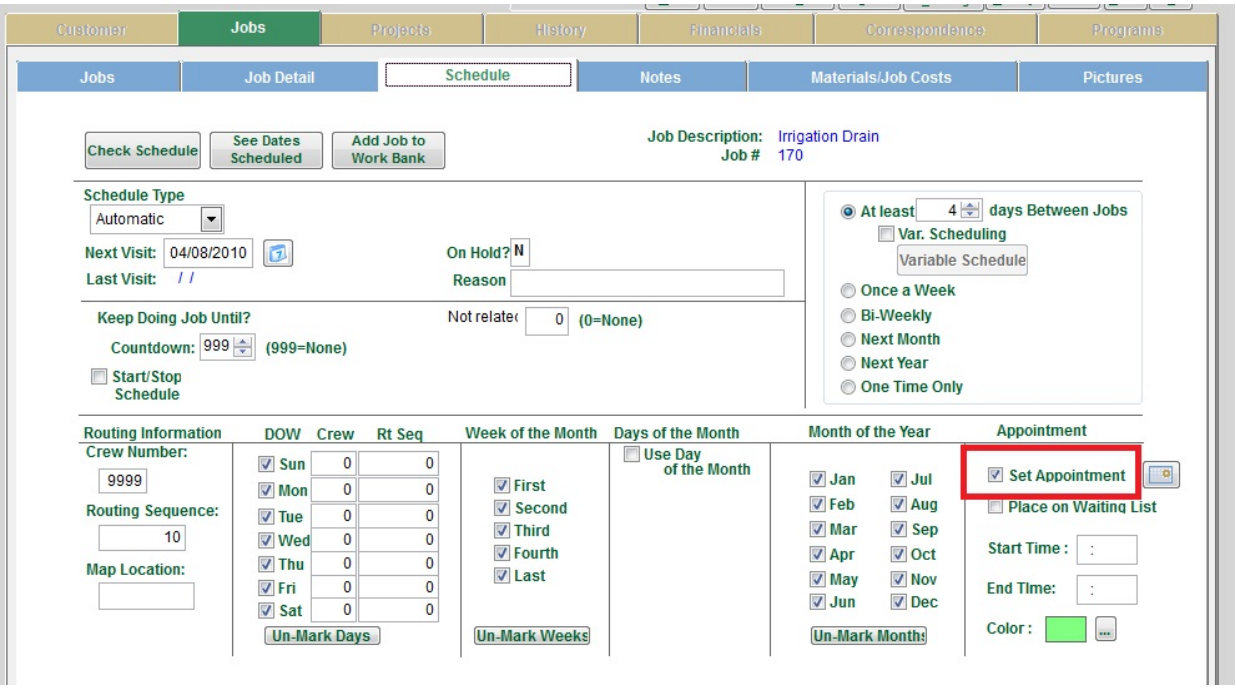
Appointment Scheduling

Appointment Scheduling can be used for any job that is set up in CLIP. It can be recurring or a one time service based on the existing scheduling options for that job. Some examples of using appointment scheduling would be:

- Meeting up with a customer to go over a project, or an estimate.
- Dentist appointments!!
- Soccer games!!
- Recording visits for doing irrigation work.
- Window cleaning jobs that require you to show up at a certain time.
- Parking lot sweepers.
- And any other type of job that requires you to schedule an appointment for a specific time with your customer.

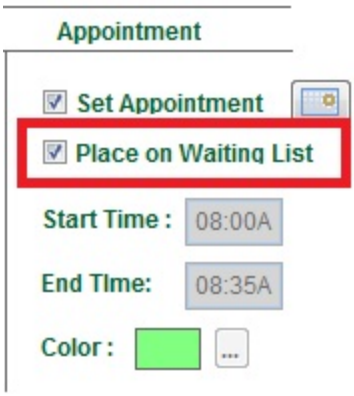
IMPORTANT: You must set up crews in order for the appointment calendar to display the jobs. Crew setup is under System > Crew Setup.

To set the job as an appointment type job, go the Scheduling tab for the job. On the bottom right, select the “Set Appointment” box.

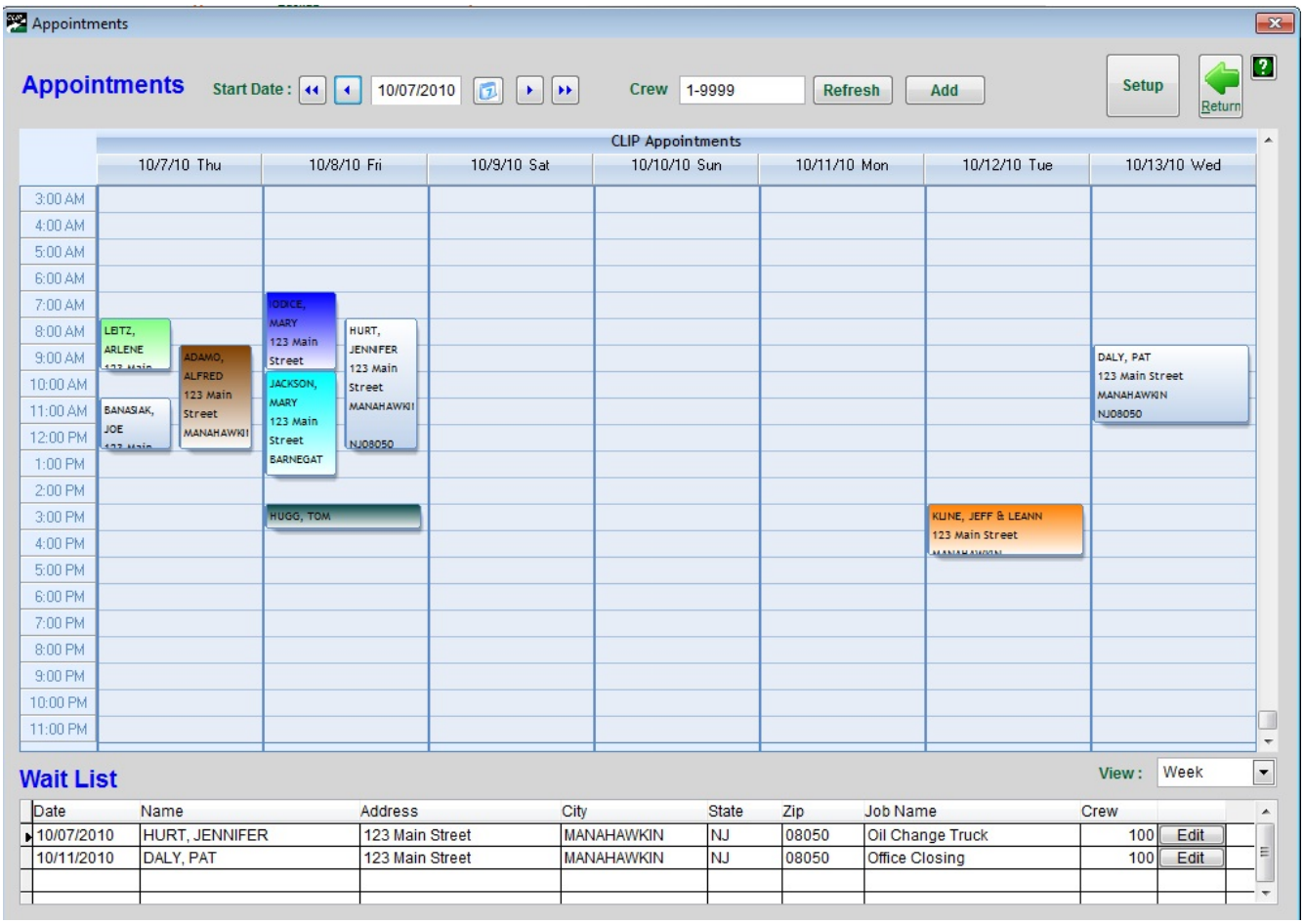


Enter a Start Time. When you go to the End Time, CLIP will automatically fill in the time based on the Start Time plus the Budgeted Man Hours for the job. You can override the End Time if needed. You can also assign a color to the appointment by using the ... next to the “Color”.

If you do not have an appointment time yet but it is an appointment type service, select “Place on Waiting List”. You will be able to drag jobs from the Wait List in the Calendar View onto the Appointment Calendar.



To access the entire Appointment Calendar, select the calendar icon from any customer's Schedule tab.



<u>List of Features:</u>

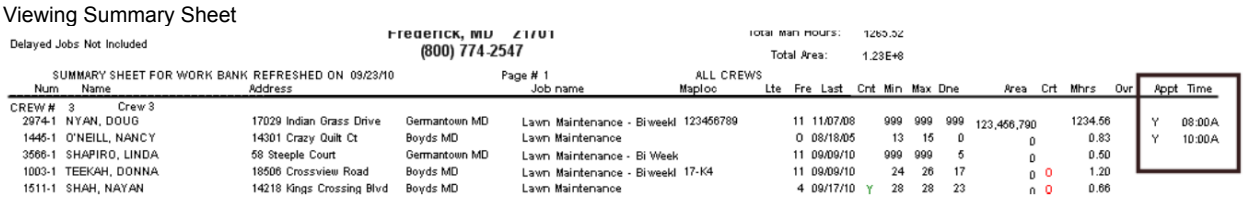
Note: All Drag and Drop features change the data back in the customer's Schedule tab.

1. Drag and drop an Appointment from one time/day to another.
2. There are three views: **Week**, **Day** and **Week By Crew**. The Week By Crew allows you to drag and drop Appointments across crews.
3. Use the Crew filter at the top to select what crews you would like to see.
4. Right clicking on an Appointment allows you to manually change the date.
5. Drag and drop unscheduled appointments from the Wait List onto the calendar and vice versa.
6. Double click on an appointment in the calendar or on the Wait List and it will take you to that job.
7. Use the Add button to open up the Customer Find box to add new customers/jobs or adjust existing jobs.
8. Use the Setup icon to change the default Time Increments on the Calendar. You can also select the days and times that you normally work. This will shade out those days and times on the calendar. Note: It will still allow you to schedule an appointment during those times.

Route Sheets:

When you refresh the Work Bank, **the Summary Sheet and Route Sheets will always have the appointments listed at the top no matter what Sort Order or Route Sheet you choose**. The Wait List Jobs will appear first, followed by the scheduled appointments and then the normal non-appointment jobs. The appointment time will appear below the customer's address on the route sheets.

Viewing Summary Sheet



Delayed Jobs Not Included

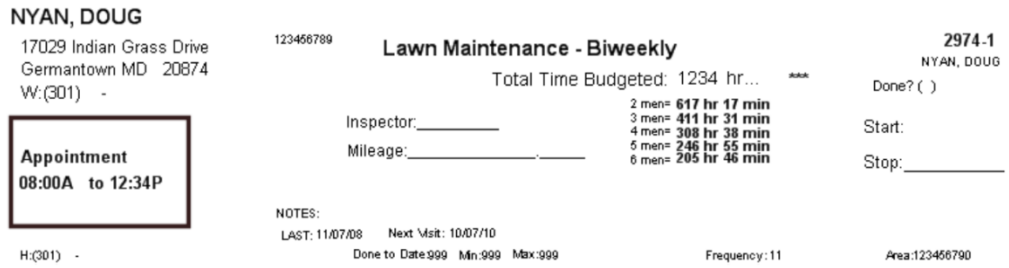
Frederick, MD 21701
(800) 774-2547

Total Man Hours: 1265.52
Total Area: 1.23E+8

SUMMARY SHEET FOR WORK BANK REFRESHED ON 09/23/10 Page # 1 ALL CREWS

Num	Name	Address		Job name	Maploc	Lte	Fre	Last	Cnt	Min	Max	Dne	Area	Crt	Mhrs	Ovr	Appt	Time
CREW # 3	Crew 3																	
2974-1	NYAN, DOUG	17029 Indian Grass Drive	Germantown MD	Lawn Maintenance - Biweekl	123456789		11	11/07/08		999	999	999	123,456,790		1234.56		Y	08:00A
1445-1	O'NEILL, NANCY	14301 Crazy Quilt Ct	Boyds MD	Lawn Maintenance			0	08/18/05		13	15	0	0		0.83		Y	10:00A
3566-1	SHAPIRO, LINDA	58 Steeple Court	Germantown MD	Lawn Maintenance - Bi Week			11	09/09/10		999	999	5	0		0.50			
1003-1	TEEKAH, DONNA	18506 Crossview Road	Boyds MD	Lawn Maintenance - Biweekl	17-K4		11	09/09/10		24	26	17	0	0	1.20			
1511-1	SHAH, NAYAN	14218 Kings Crossing Blvd	Boyds MD	Lawn Maintenance			4	09/17/10	Y	28	28	23	0	0	0.66			

Viewing Route Sheet



NYAN, DOUG
17029 Indian Grass Drive
Germantown MD 20874
W:(301) -

Appointment
08:00A to 12:34P

H:(301) -

123456789

Lawn Maintenance - Biweekly
Total Time Budgeted: 1234 hr...

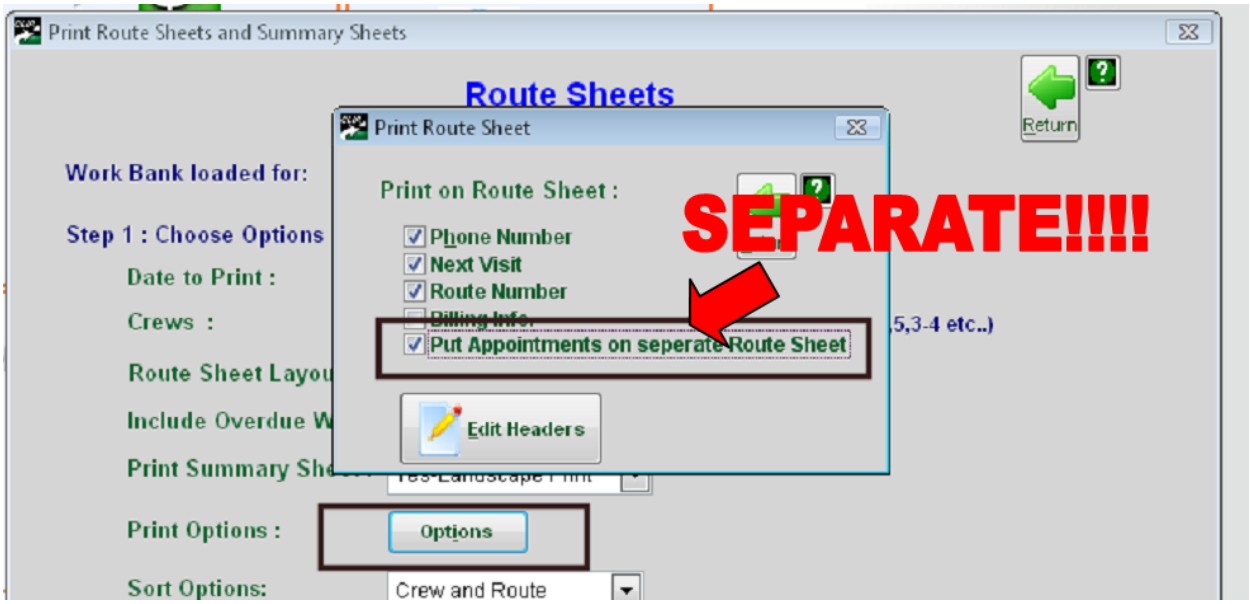
Inspector:_____
Mileage:_____._____

2 men= 617 hr 17 min
3 men= 411 hr 31 min
4 men= 308 hr 38 min
5 men= 246 hr 55 min
6 men= 205 hr 46 min

2974-1
NYAN, DOUG
Done? ( )
Start:
Stop:_____

NOTES:
LAST: 11/07/08 Next Visit: 10/07/10
Done to Date:999 Min:999 Max:999 Frequency:11 Area:123456790

You have the option of printing the appointments on separate route sheets. Under Options in Print Route Sheets, select "Put Appointments on separate Route Sheet".


Print Route Sheets and Summary Sheets
Route Sheets
Return
Work Bank loaded for:
Step 1 : Choose Options
Date to Print :
Crews :
Route Sheet Layou
Include Overdue W
Print Summary She
Print Options :
Options
Sort Options:
Crew and Route
Print Route Sheet
Print on Route Sheet :
Phone Number
Next Visit
Route Number
Billing Info.
Put Appointments on seperate Route Sheet
Edit Headers
SEPARATE!!!!
,5,3-4 etc..)