

CLIPConnect

Revised 01/13/11

Introduction

CLIPConnect was designed to give companies access to their customer information from wherever they are, and allow the crew to go paperless for their route sheets. CLIPConnect is a barebones version of CLIP2Go Web, which has the recording work functionality built into it.

In this manual we will show you the main screen for the CLIPConnect program, and then we will run through the different options and their functions. CLIPConnect will interact with *CLIP*, so we will be dealing with functions on the device, and how to import the data into *CLIP*.

Table of Contents

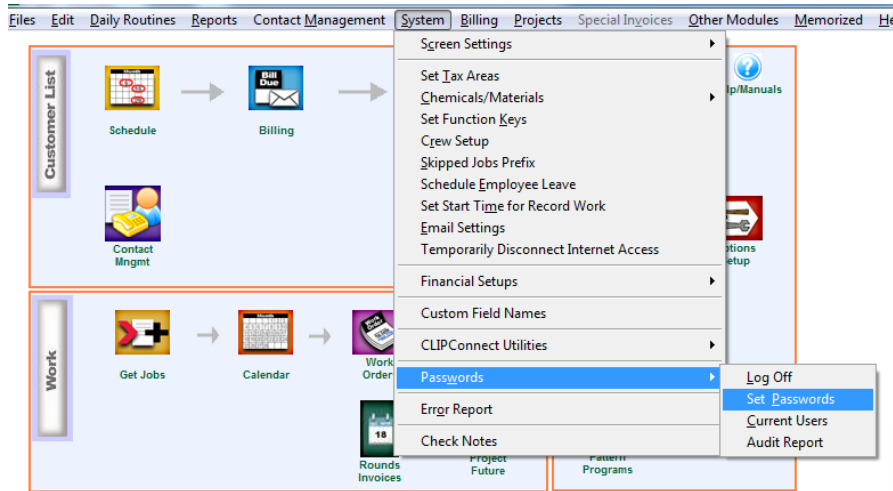
Contents

Introduction.....	1
Setting Up Passwords and Users.....	3
Setting Up Company Password	4
Setting Up Crews	5
Putting Customer Data and Route Sheets into the program	7
Synchronizing the changes and recorded work to CLIP.....	10
Processing the Recorded Work files in CLIP	11
Using CLIPConnect	13
Main Screen	13
See Work and starting and stopping jobs.....	14
Time Clock.....	16
Crew Setup.....	18
Adjusting Crews.....	18
Recording Features for Programs and Rounds	19
CLIPConnect: Employee Training Instructions.....	20
Frequently Asked Questions	29

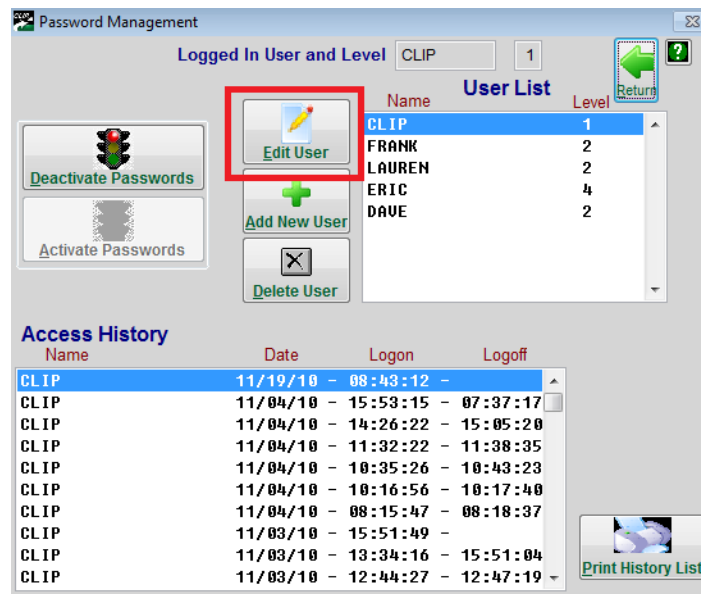
Setting Up Passwords and Users

Setting up passwords for CLIP Connect is an effective way of keeping certain employees out of your valuable information. You can allow your employees to see just enough to get the job done quickly and efficiently.

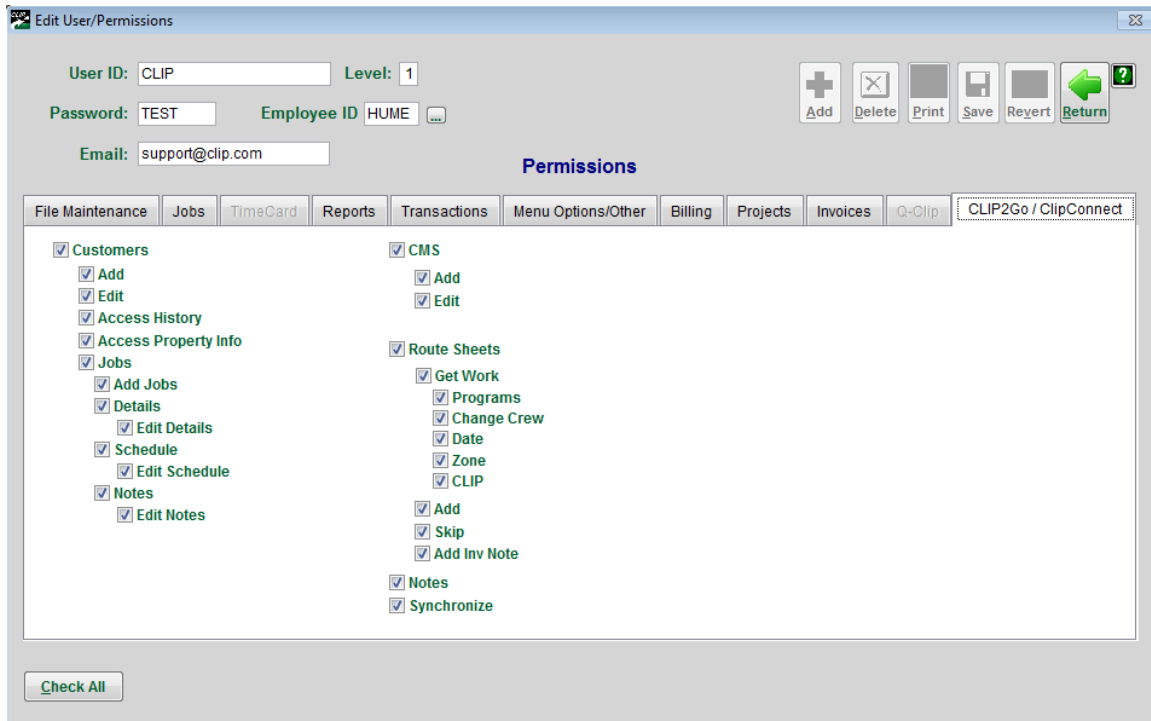
1. First open your **CLIP** program on your main computer.
2. Log into CLIP using your **CLIP** username. (You must have passwords turned on first- see reference manual for information on using passwords)
3. From the main screen select System > Passwords > Set Passwords. If it does not open check to make sure that you are logged into an account that has the ability to change passwords.



4. Select the User whose password you would like to change in the User list window and click Edit User



5. Select the CLIP2Go/CLIPConnect tab



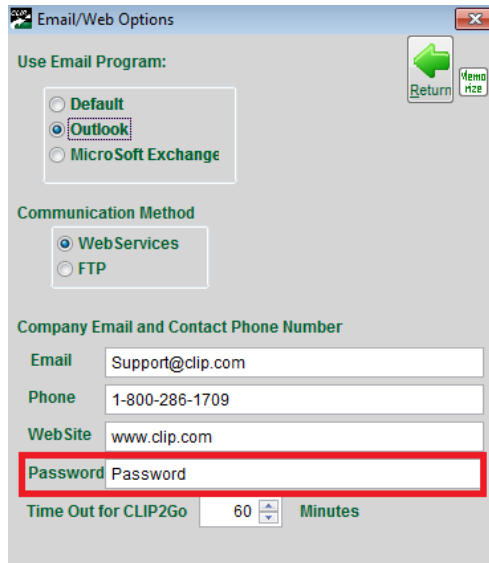
6. Check the boxes that the user should have access to. If you want them to be able to see a menu then simply check the box next to it. For example if I want to allow them to change the members on a crew then I can check the boxes next to that menu option.

When you are finished setting up the employee click on the save button to save your selections, and then click the return button in the upper right corner. Click it one more time and then you will be at the main screen of CLIP.

Setting Up Company Password

All companies that utilize ClipConnect will start at the same web page. You will log in using your CLIP serial number and your company password. This password can be changed at anytime.

1. Open your **CLIP** program and log in using the CLIP username and password. This will give you rights to change the password (You must have passwords turned on first- see reference manual for information on using passwords)
2. Go to System > Email Settings
3. Set the Password



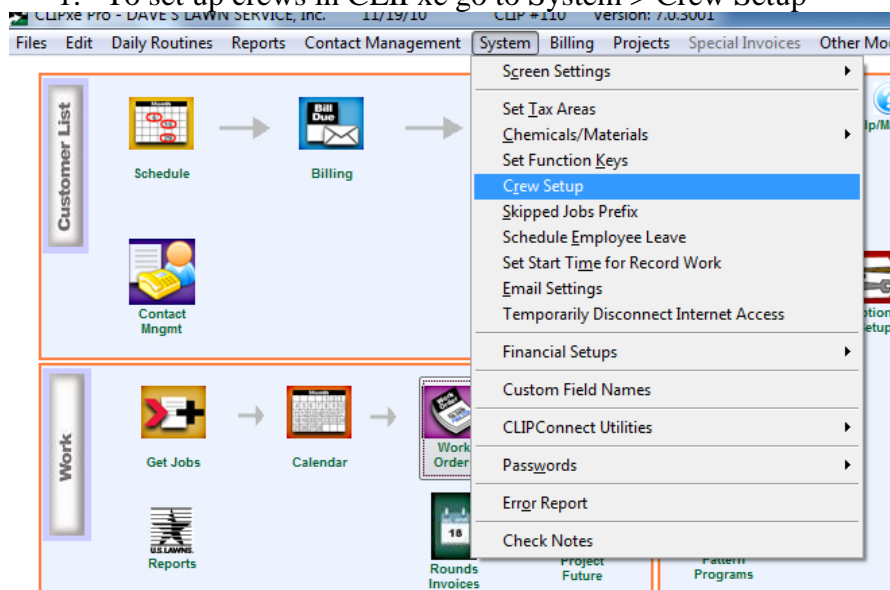
4. Select Return to Save the changes

Setting Up Crews

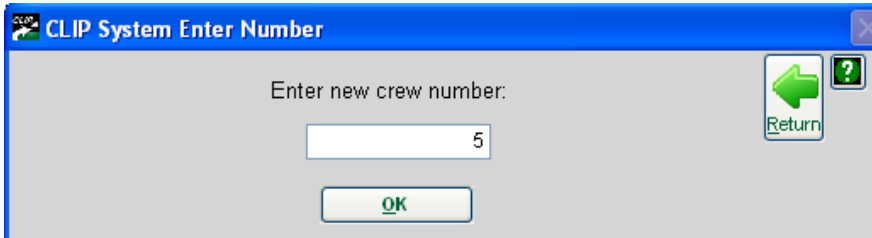
Setting up Crews in CLIPxe will allow you to track the employees that actually work on each job. Once crews are set up you can Add and Remove employees in CLIP Connect easily at any time.

Note: If you do not set up crews first in CLIPxe you will not be able to add employees to crews on CLIP Connect. You must have employees setup before setting up crews.

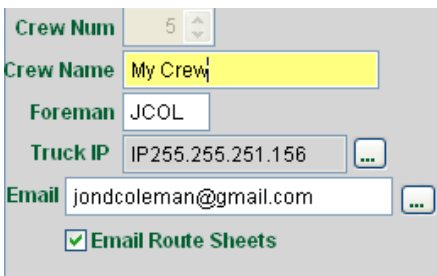
1. To set up crews in CLIPxe go to System > Crew Setup



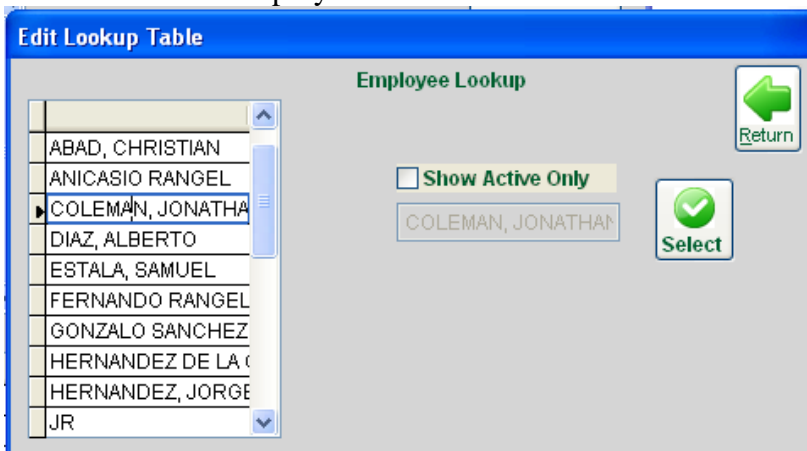
2. Select “Add Crew”
3. Enter a Crew number



4. Select “Ok”
5. Enter a “Crew Name” and “Foreman”



6. Select “Save”
7. Choose the new crew from the list
8. Select “Add Employee”
9. Select the employee from the list



10. Select “Select”
11. Continue to “Add Employees” as needed.
12. Select “Save”

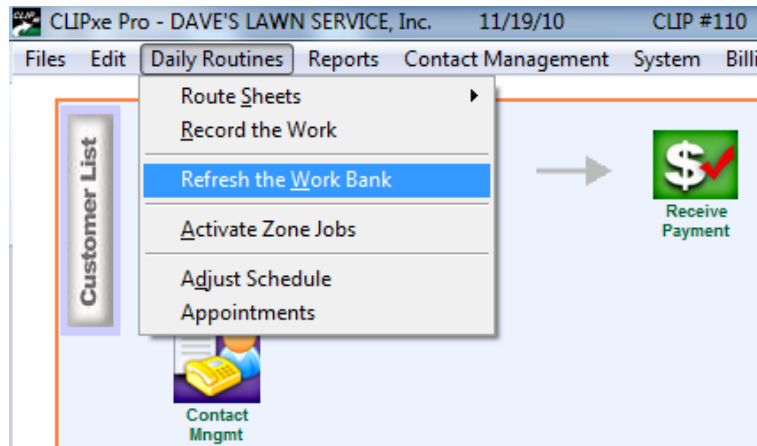
Note: This list can be adjusted at any time. Some companies do it each morning if a crew has changed and then send it to Clip Connect.

Putting Customer Data and Route Sheets into the program

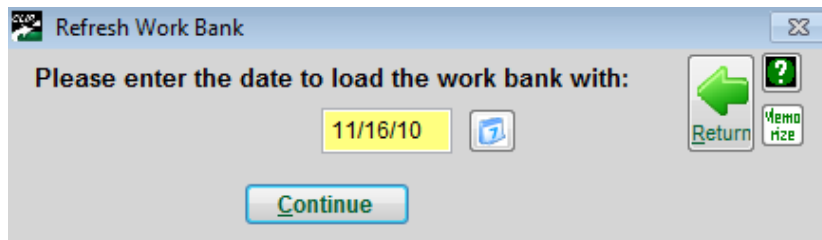
If you are going to upload Programs and Rounds from CLIP for your crews, you must use the “Rounds Invoices” feature as you normally would do to select what rounds you want.

In **CLIP**> Daily Routines>Print Route Sheets, select CLIP2Go and “Upload”. When you “Send” the information, the data from **CLIPxe** will be shown in the exact order and with the exact crew as you had it in **CLIPxe**. For example if you manually adjust the route sheet then you will want to use this method.

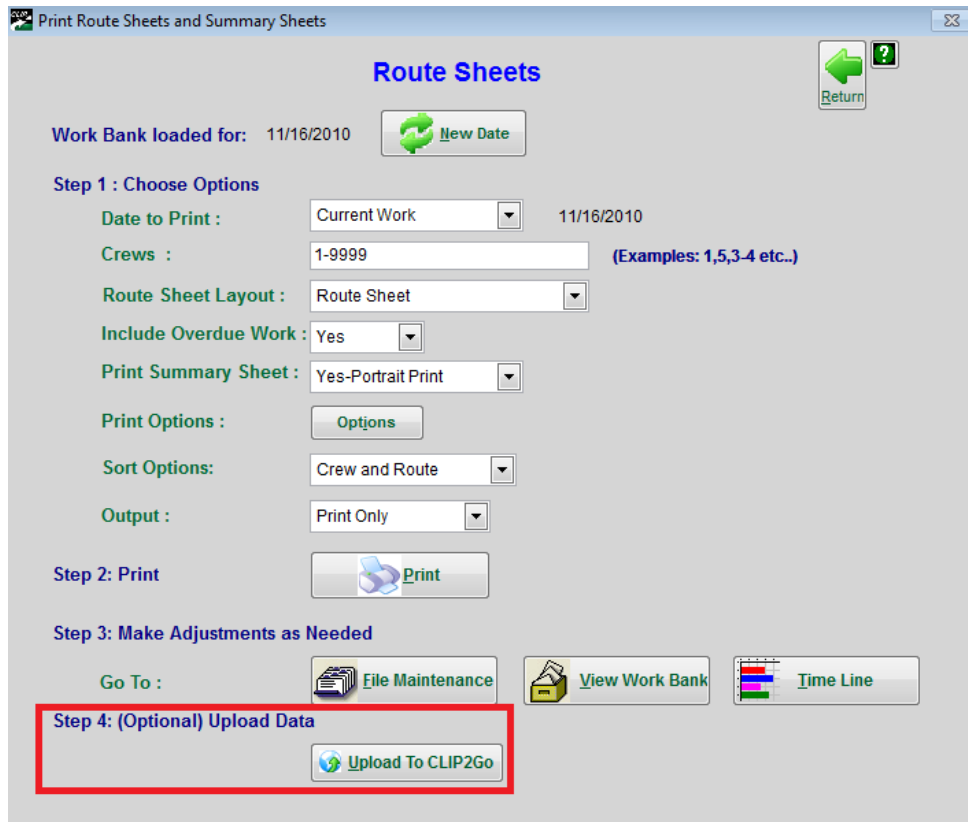
1. Go into your **CLIPxe** program.
2. If the Work has not been refreshed click on the Daily Routines menu, and then click Refresh the work bank.



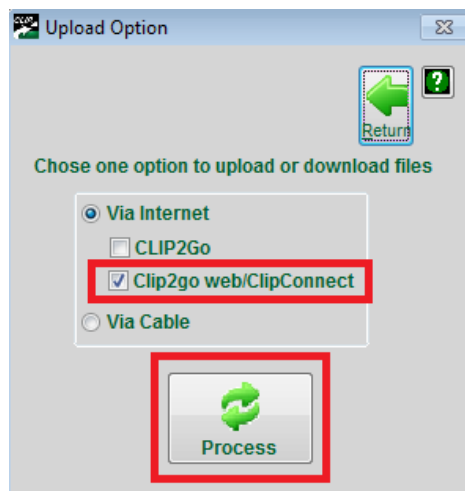
3. Enter the date for which you would like to refresh the work bank and click continue. Any work scheduled for the day that you selected or earlier (when you were refreshing the work bank) will show up to be uploaded to ClipConnect.



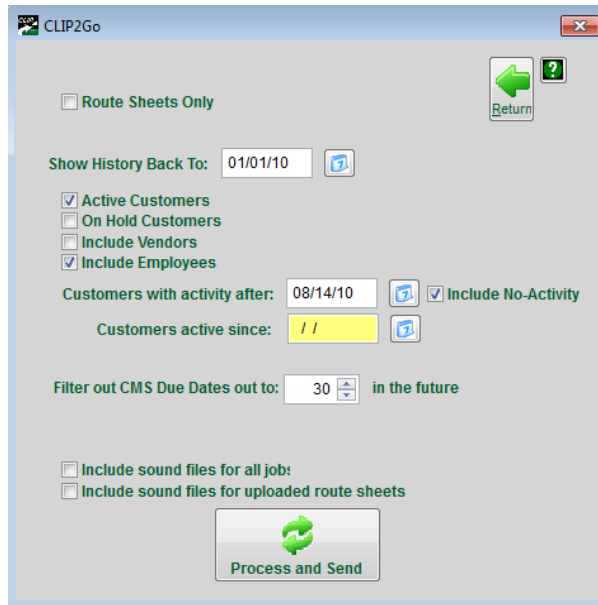
4. Select the “Work Orders” icon
5. On Step 4: Select “Upload To CLIP2Go”



6. Choose “Via Internet” > “CLIP2Go web/ClipConnect”



7. Select “Process”. The CLIP2Go/CLIPConnect dialogue box should pop up waiting for you to tell it which type of data to send.

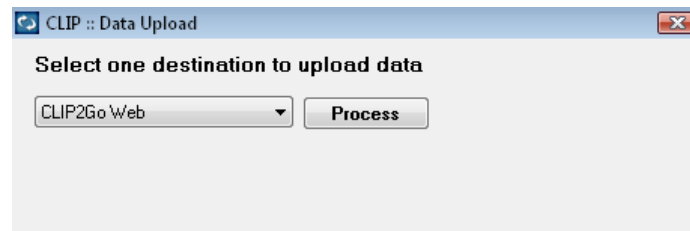


- **Show History Back to (Clip2Go Web Only)** box allows you to select how much customer history you would like. The more you choose the longer it will take to transfer the data and it may slow the device down some. Normally the current season will be appropriate.
- **Active Customers** will send all of the customers to the device that are not on hold for the specified dates.
- **On Hold Customers (Clip2Go Web Only)** allows you to include all of the customers that are on hold but still have been active recently. This option can be used for adding customers that might be taken off hold in the near future. For example, if you have them on the device then you can take them off hold and mow their lawns if they call you when you are in the field.
- **Include Vendors (Clip2Go Web Only)** will include any record that has the “Vendor” box checked off
- **Include Employees** will include any record that has the “Employee” box checked off
- **Customer with activity after (Clip2Go Web Only)** allows you to select data based on the customer’s Last Activity date as shown in the customer’s main screen. You can leave this blank to include all customers.
- **Customers active since (Clip2Go Web Only)** allows you to narrow down the data to customers “Active Since” date in the customer main screen. This can be left blank to include all customers.
- **Filter out CMS Due Dates out to xx in the future (Clip2Go Web Only)** option allows you to select how many days of CMS notes (Contact Management System notes) you would like to see. This allows you to see a CMS that is not due until xx days. If you select 10 days for example, then you will see each CMS note that is due in less than 10 days from today.

7. After you have completed your selections in this screen, click on the “**Process and Send**” button to send the information to the web.

Note: Any empty date fields will always be included in the sort regardless of what date is chosen. Older CLIP customers may want to do a global replacement (File>Global Replacement>Replace Information) for the “Customer Since” field to make the filter more accurate.

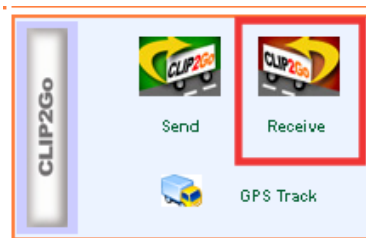
8. When the Data Upload box appears, select the “Process” button.



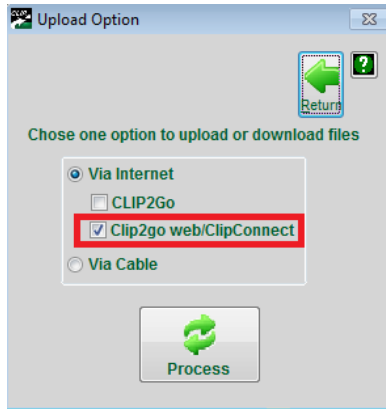
11. Go directly to the website login page and start using Clip Connect!

Synchronizing the changes and recorded work to CLIP

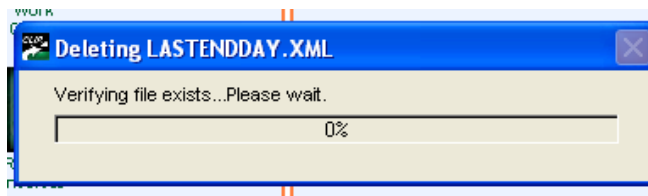
1. After changes have been made on Clip Connect, you must receive them so they can be added into CLIP. Log into your *CLIP* program and click the button that says “Receive”.



2. Choose “Via Internet” - “CLIP2Go web/CLIPConnect”



3. It will download all files and process them. You will be notified when they are all done



4. The information from CLIPConnect has been put into **CLIP**. If you downloaded recorded jobs you must go into Record Work and complete the process as described in this manual.

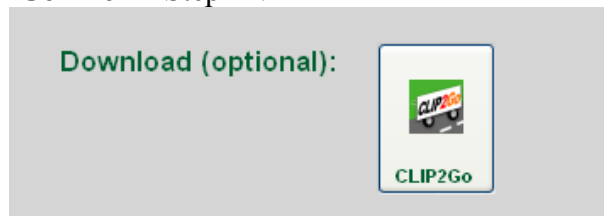
Processing the Recorded Work files in CLIP

All changes to customers, jobs, and CMS are automatically updated when the “Receive” process is run. The recorded work files must still be processed.

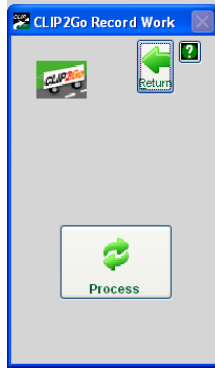
1. In **CLIP** select the “Record” icon



2. Select “CLIP2Go” from “Step 1”.



3. Select “Process”. **CLIP** will find and process all record work files that were synced from all devices/the web.



You will be able to see the processed work by looking in “Mark Work as Done”.
When posting work with the “Enter Employee Info” option selected, the employee’s total time from CLIPConnect’s “Time Clock” feature will automatically be entered into the employee time entry screen.

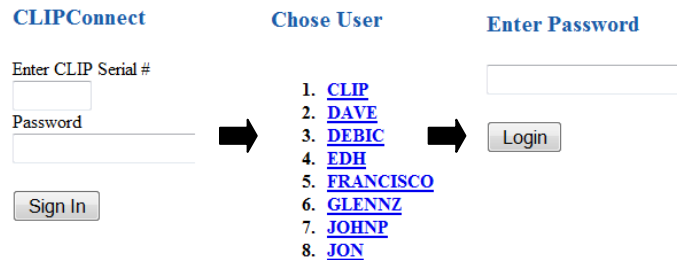
Using CLIPConnect

Main Screen

Go to the web page login screen. Enter the company serial # and password.

<http://www.clip2go.net/clipconnect/CompanyLogin.aspx>

Choose the user from the list. Enter the password for that user on the next screen.



After you login, you will see the CLIP Connect main screen.

CLIPConnect

1. [See Work](#)
2. [Time Clock](#)
3. [Crew Setup](#)
4. [Conditions](#)
5. [Set Up](#)
6. [Log Out](#)

1. **See Work** - This will let you see work for the first crew on your list. If you want to change the crew, go to Crew Setup (See option 3)
2. **Time Clock** - This will allow your employees to punch in and punch out.
3. **Crew Setup** – This is where you can add people to crews and set the crew for which you would like to see work. (See option 1)
4. **Conditions** - This option will allow you to edit working conditions such as wind speed, wind direction, temperature, weather, and lawn condition.
5. **Set Up** - This allows you to setup your time zone.
6. **Log Out** - Use this to log out of CLIP Connect.

See Work and Starting and Stopping jobs

1. Select See Work.

CLIPConnect

1. [See Work](#)
2. [Time Clock](#)
3. [Crew Setup](#)
4. [Conditions](#)
5. [Set Up](#)
6. [Log Out](#)

2. This will bring up the list of customers for the Crew selected in Crew Setup. This list also tells me if a job has been done (Y), not done (N), skipped (S), or incomplete for a job that is in progress (I).

NOTE: Jobs marked as done will not show up until you click Show All Done.

3. Click on a customer to see their information.

[Back](#) [Show All Done](#)

Status Customers

1. [N EICKEL, DIANE](#)
2. [I - GARCIA, GRACIELA](#)
3. [N - DE FILIPPIS, ROBERT](#)
4. [N - WEISS, MARK](#)
5. [N - HARRIS, BARBARA](#)
6. [N - TASH, ROBIN](#)
7. [N - NATION, PEGGY](#)
8. [N - COX, BRUCE](#)
9. [N - GEORGE, BINDU](#)
10. [N - BUTLER, LAWRENCE](#)
11. [N - SINGH, MANJIT](#)
12. [N - CHOPRA, YASH](#)
13. [N - TANG, LEI](#)
14. [N - MATOSKO, SCOTT](#)
15. [N - ALAM, SYED](#)
16. [N - FARBER, IVEY](#)
17. [N - LEONARD, TRACIE](#)

4. Click Ok to verify that this is the customer that you would like to service.

[Back](#)

#: 1773
WEISS, MARK
102 Manette Court
Gaithersburg MD
Map:
Route: 0
H. Ph.: (301) 762-6398
W. Ph.: (301) 762-6398
Notes:
Jobs:

[Ok](#)

5. This will bring you to the customer's job screen.

[Back](#)

Status Jobs

1. [N - Leaf Clean Up](#)

6. Click on the job to go into it.

[Back](#)

Leaf Clean Up
MHrs: 0
Notes:

[Ok](#)

7. Verify this is the correct job, click Ok. Click "Start Job" if you are going to start doing the job or to skip the job (maybe it is too wet to cut the grass) click the "Skip Job" button.

[Back](#)

Leaf Clean Up

1. [Start Job](#)
2. [Skip Job](#)

[Back](#)

Leaf Clean Up
02:44:31 PM

1. [Finish](#)
2. [Add Inv Notes](#)
3. [Conditions](#)
4. [Cancel](#)

8. At this point, you can hit Finish, Add Invoice Notes, record the Conditions, or Cancel the job.
9. When you hit Finish you can mark the job as done (End Job) or Incomplete.

[Back](#)

Lawn Maintenance - Bi Weekly/Call In

1. [End Job](#)
2. [Incomplete](#)
3. [Add Another](#)

10. To do a group of jobs click on the “Add Another” button. Grouping allows you to take a group of jobs for the same customer or multiple properties and spread the total time spent over all the jobs. After you have made the job a group job, hit Back and you will be taken to the customer screen. From here you can choose another customer and add a job to the group of jobs.. When you get to the last job that you did in the group choose “End Job” instead of clicking “Add another.”
11. Keep on following the process until you have completed or skipped all of the jobs on your route.

Time Clock

1. If you use the employee tracking feature in *CLIP* you can have the employees punch in/out at the beginning of the day. Select the “Time Clock” button.

CLIPConnect

1. [See Work](#)
2. [Time Clock](#)
3. [Crew Setup](#)
4. [Conditions](#)
5. [Set Up](#)
6. [Log Out](#)

Crew Setup

1. On the Clip Connect home screen, select “Crew Setup”.

CLIPConnect

1. [See Work](#)
2. [Time Clock](#)
3. [Crew Setup](#)
4. [Conditions](#)
5. [Set Up](#)
6. [Log Out](#)

2. This will bring you to the Crew Setup Screen.

Crew: 1

[Back](#)

1. [Change Crew](#)
2. [Foreman](#)
3. [Employees](#)

3. From here you can see which crew is currently selected. You can change the selected crew and edit the Foreman and Employees for that Crew. NOTE: You will only see work for the crew that is selected.

Adjusting Crews

1. Click Change Crew. Choose the crew you would like to edit.

1. [9999](#)
2. [1](#)
3. [2](#)
4. [3](#)
5. [4](#)
6. [5](#)
7. [20](#)
8. [100](#)

2. The current crew will appear at the top of the screen.

Crew: 3

[Back](#)

1. [Change Crew](#)
2. [Foreman](#)
3. [Employees](#)

3. To pick or change a foreman, click Foreman and choose the employee from the list.
4. Clicking on Employees will let you view the current employees on the crew, add, or delete employees.

Employees

[Back](#)

Crew: 3

1. [View](#)
2. [Add](#)
3. [Delete](#)

5. To see/record work for theselected crew, navigate to the home screen and select See Work.

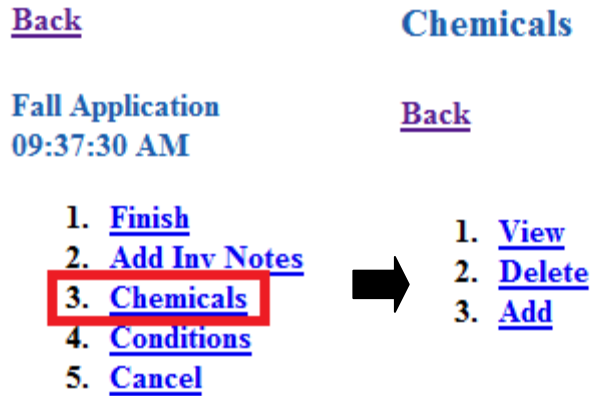
Recording Features for Programs and Rounds

If the job is a “Round”, a different set of options will appear on screen. This menu allows you to enter Chemicals and modify the conditions.

Select “Chemical” to view, add, or delete chemicals. When adding a new chemical the Quantity will be calculated automatically based on the Rate and Area. You can adjust this quantity if needed.

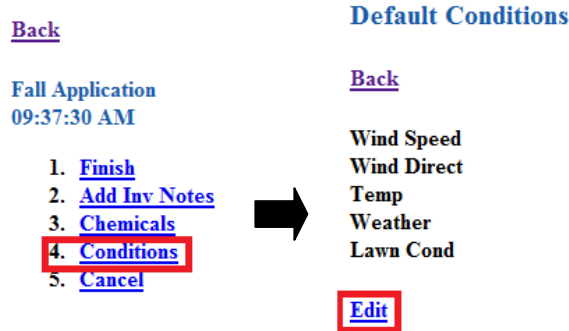
Note: This quantity is transferred from the original setup for the round in CLIPxe so it should not need to be adjusted

By selecting “Chemicals”, you will be able to View, Delete or Add Chemicals.:



By selecting “Conditions”, you will be able to view the current conditions, or edit them as necessary.

Select Edit at the bottom of the screen to edit the Condition values.



CLIPConnect: Employee Training Instructions

This can be used as a field guide to train your employees and staff on using CLIPConnect.

Foremen:

1. Go to login web page (<http://www.clip2go.net/clipconnect/CompanyLogin.aspx>)
2. Login to the company

CLIPConnect

Enter CLIP Serial #

Password

Sign In

3. Choose your name from the list of login names

Chose User

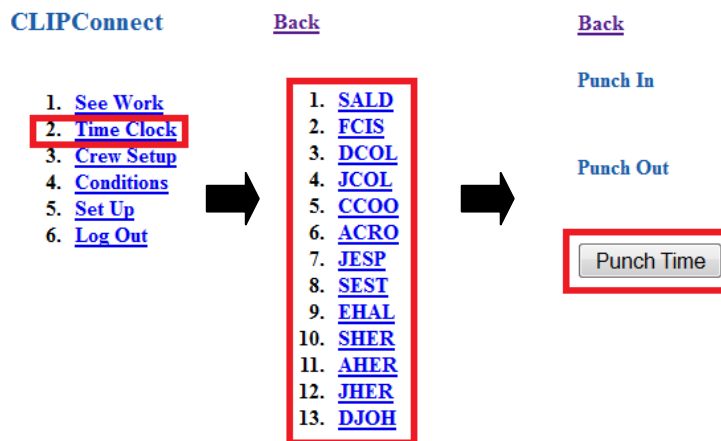
1. [CLIP](#)
2. [DAVE](#)
3. [DEBIC](#)
4. [EDH](#)
5. [FRANCISCO](#)
6. [GLENNZ](#)
7. [JOHNP](#)
8. [JON](#)

4. Enter the password in the next screen

Enter Password

Login

5. Punch in via “Time Clock”



6. Go back to the CLIPConnect main screen and select “Crew Setup”

CLIPConnect

1. [See Work](#)
2. [Time Clock](#)
3. [Crew Setup](#)
4. [Conditions](#)
5. [Set Up](#)
6. [Log Out](#)

7. Verify that the correct crew is selected and the employees on the crew are correct by going into Employees.

Crew: 100

[Back](#)

1. [Change Crew](#)
2. [Foreman](#)
3. [Employees](#)

8. Verify the crew and employees and edit as necessary. Go back to the ClipConnect main screen.

Employees

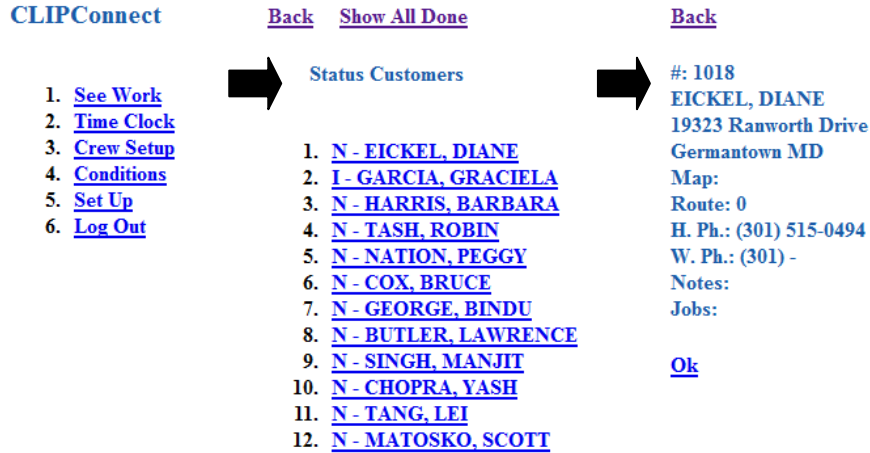
[Back](#)

Crew: 100

1. [View](#)
2. [Add](#)
3. [Delete](#)

At Customers property

- Click “See Work”. Choose the customer, then verify that it is the correct customer.



- Choose the job you would like to start. Hit Ok to verify the job; Hit Start Job. If you are skipping the job, select Skip Job.



- Click “Finish” when complete. If the job is done, click End Job. This will show you the job with a status of Y if it has been completed.



- Go back to Step 9 and repeat until the end of day.

- Have laborers and foreman punch out via time clock

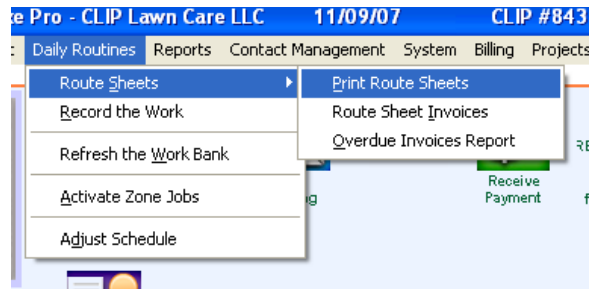
CLIPConnect

1. [See Work](#)
2. [Time Clock](#)
3. [Crew Setup](#)
4. [Conditions](#)
5. [Set Up](#)
6. [Log Out](#)

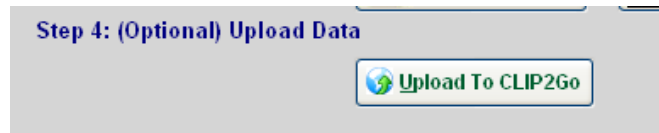
Office Administrator of CLIPConnect:

At Office before Crews leave for day.

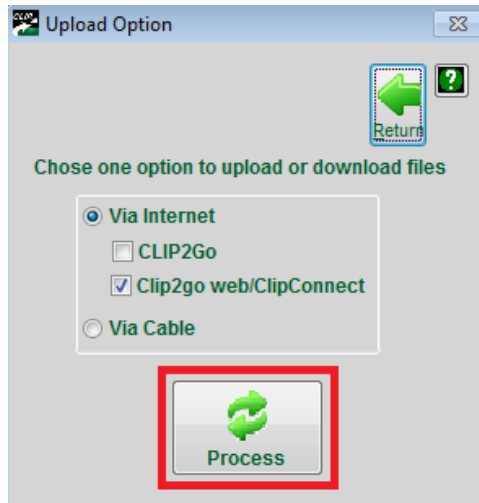
1. Go to Route Sheets in *CLIP*:



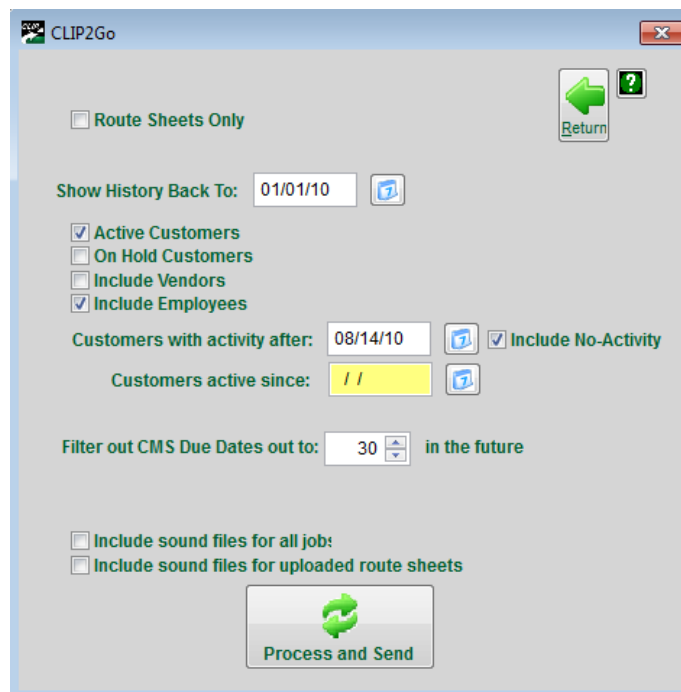
2. Click “Upload to CLIP2Go”



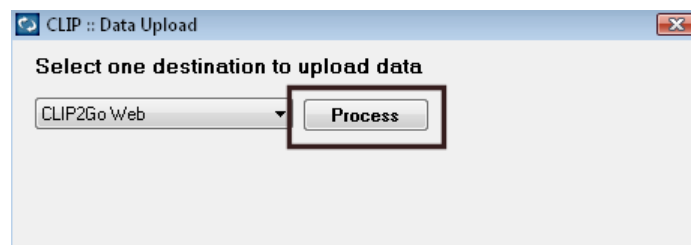
3. Click “Via Internet” – “CLIP2Go Web/CLIPConnect”
4. Click “Process”



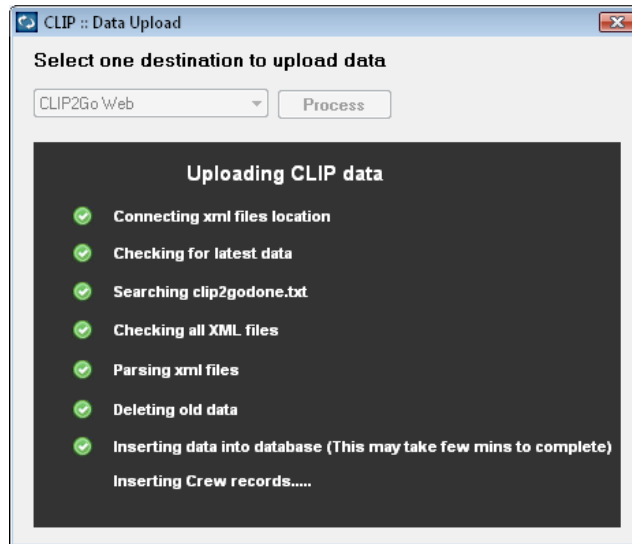
5. Choose appropriate options. Click “Process and Send”
- 6.



7. Click “Process”. This can take some time depending on how much data you choose to send.

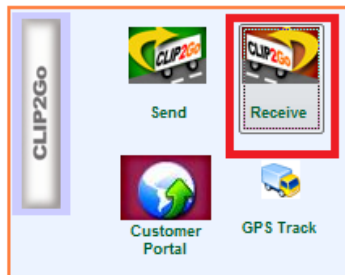


- Files will upload to the internet. The window will close when it is finished. You can use CLIPxe while it is uploading since this is a separate program.

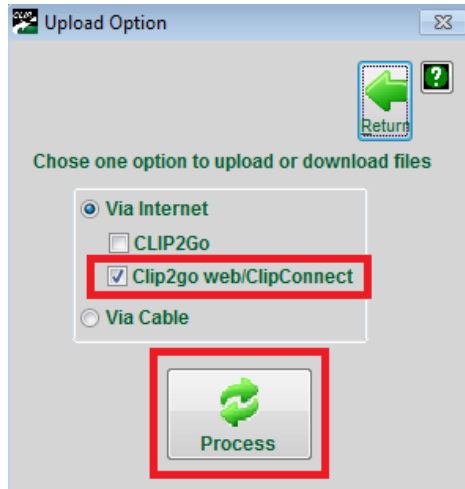


Back at Office after all Crews return for day or anytime during the day:

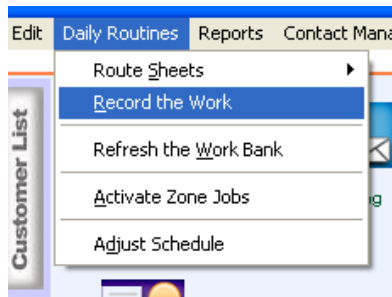
- Select "Receive" in *CLIP*



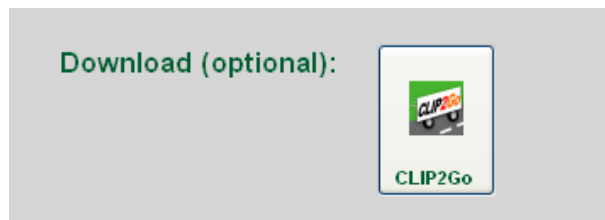
- Select "Via Internet"- "CLIP2Go Web/CLIPConnect". Click "Process".



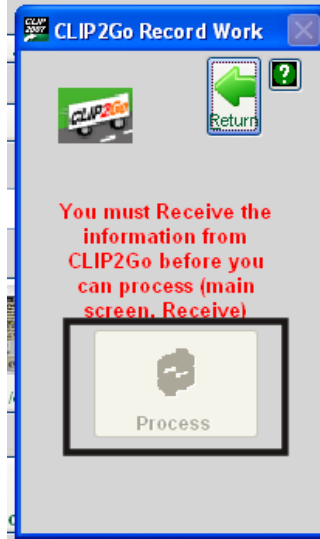
3. If jobs were recorded, go to “Record the Work”.



4. Click on “CLIP2Go”.



5. Click “Process”.



6. Review the marked work and post. Employee times will be filled in if you are using the Punch Clock feature.

Frequently Asked Questions

In CLIPxe-Record Work I can't see work that has been recorded.

The crew range you have selected is not including the crew number that was recorded work for.

I get a message that says "User is already logged in".

They did not use the Logout button but rather used the X to close the program. The program will kick the user out automatically in 15 minutes if the program is not being used.

I get a message that says I have no more licenses.

Check to make sure that another user is not in the program or if you have CLIPConnect open in multiple locations. If you used CLIP2Go in the past you must unregister the devices in CLIP.