

Estimates in Jobs

With CLIPxe, we have included a new series of functions that help you create estimates from your Jobs straight into Microsoft Excel and then to Microsoft Word. This gives you lots of flexibility with estimating and creating your own proposals.

For this function to work properly we are depending on the data in CLIP to be correct. Items that must be filled in correctly are the “Charge” and “Max”

The screenshot displays the 'File Maintenance for customer: TANG, JENNY' window. The customer information is 'TANG, JENNY' at '13910 Rockingham Rd'. The 'Jobs' tab is selected, showing 'Job # 1' with the description 'Lawn Maintenance'. A 'Job Change' button is highlighted with a red arrow. A table shows 'Min', 'Max', and 'Due to Dte' values of 28. A 'Charge per Job' of 22.50 is shown with a 'Discount Applied' label. Other fields include 'Man Hour Rating', 'Charge Per Hour', 'Job Area', 'Tax Type', 'Average Time', and 'Materials/Subs Cost'. A 'Create Estimate' button is at the bottom.

This can be combined with the new Projects Module (Projects is an extra module that can be purchased for the Pro version) function that allows materials in jobs to create Lightning fast proposals and estimates.

SETUP

You will first have to create some Word templates that you will use for your estimates. You will create a Word document that contains your estimate information and wording. Instead of putting in the prices or descriptions you will add a merge field from CLIP. When you make the estimate the merged fields will be automatically filled in from the customer's information.

To make a template pick any customer that you want to make an estimate for.

Make sure the customer has at least one job.

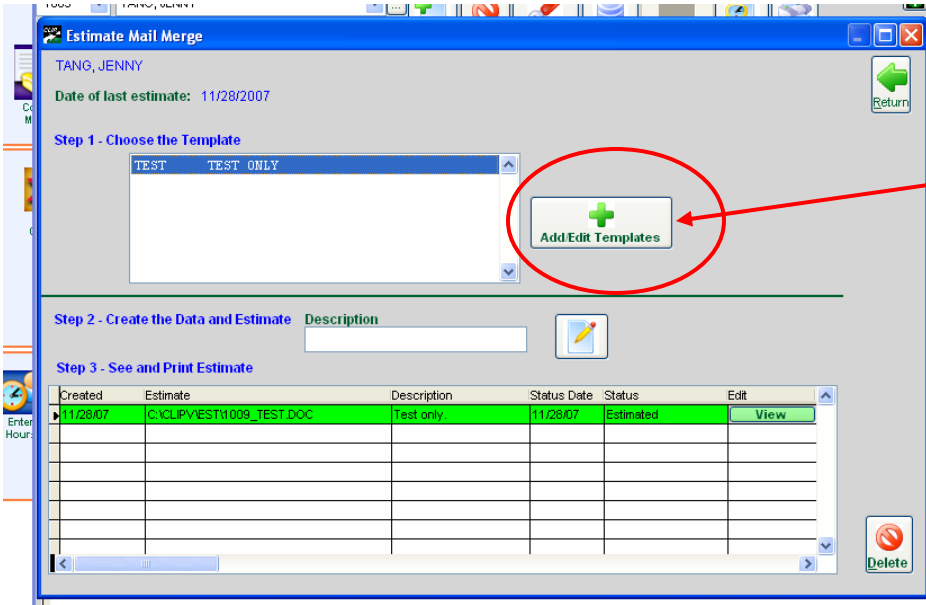
In the Job Details Screen you have an option to include or not include the job in the estimating function. Make sure that at least one job is marked as "Include".

The screenshot shows the 'File Maintenance for customer: TANG, JENNY' window. The 'Jobs' tab is selected, and the 'Job Detail' sub-tab is active. The job details include:

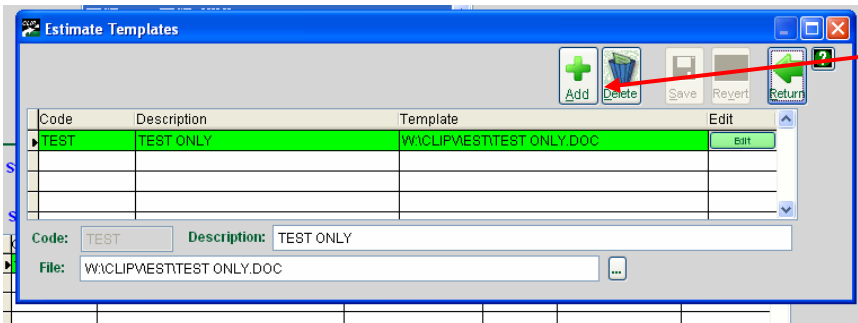
- Job # 1
- Job Description: Lawn Maintenance
- Job Category: (empty)
- Job SubCategory: (empty)
- Job Type: (empty)
- Last Year Price: 0.00
- JB.Custom Numerical: 0.00
- Crew Number: 3
- Routing Sequence: 5420
- Map Location: 18-B6
- Estimate Code: TEST
- Include in Estimate:
- Invoice #: 0
- Date Printed: (empty)
- Salesman: (empty)
- Sold Date: (empty)
- Commission Rate: 0.00
- Charge per Job: 22.50
- Man Hour Rating: 0.56
- Charge Per Hour: 40.00
- Job Area: 4,125
- Tax Type: D
- Average Time: 0.36
- Materials/Subs Cost: 0.00
- Credit: 4001
- Debit: 4020

The 'Create Estimate' button is circled in red at the bottom right of the window.

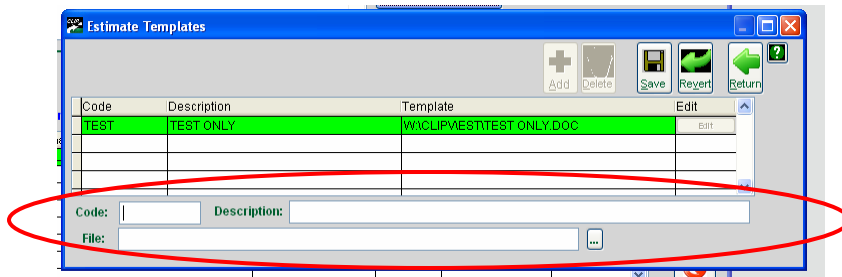
Click the "Create Estimate" button



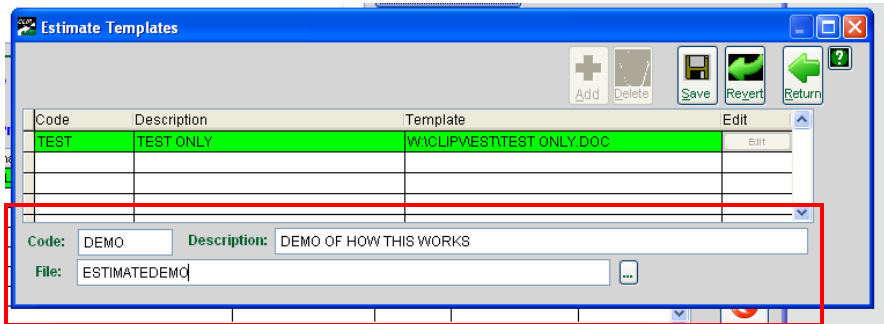
Click Add/Edit Templates



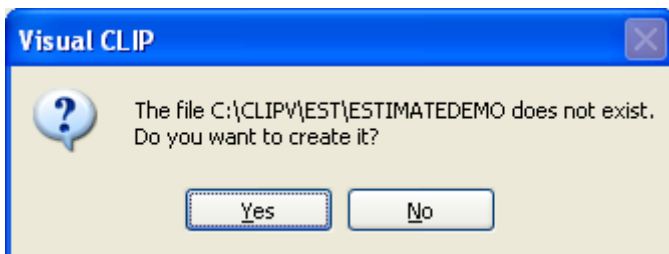
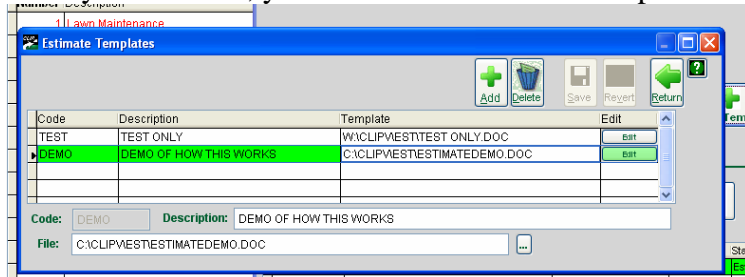
Click Add



In the “Code” enter a short description of the new estimate form. In the “Description” enter a long description. In the “File” enter in the name of the Word document you want to create.



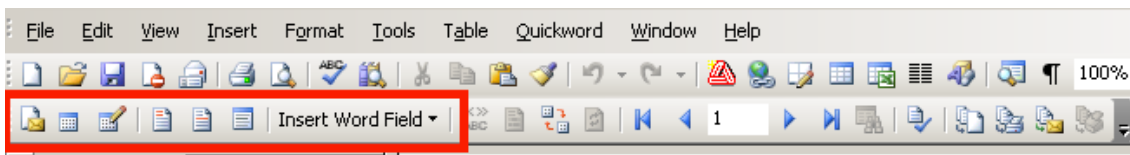
Once you SAVE it, you will see it as one of the options:



Select “Yes” to create the new template

Depending on your computer this will take up to a minute. First you will see Word open up then Excel will open, after which you may get the following message

Select Yes.

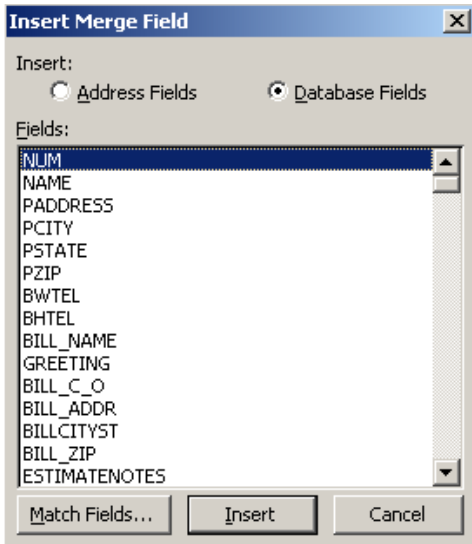


You will now have access to the mail merge tool bar.

Type out all the wording of your estimate.



When you get to a spot where you will want information from CLIP select the “Insert Merge Field” button



You will see a list of fields you can use. (Field meaning listed below)

Select the one you want and select “Insert”

Example:

| CLIP Lawn Care LLC 2005 Annual Maintenance Agreement | | | | | | |
|--|-------------------|--|----|---|------------------------------------|--|
| Prepared for: «BILL_NAME» «BILL_ADDR» «BILLCTYST» «BILL_ZIP» | | | | | | |
| Choose a payment plan and initial | | | | | | |
| <table border="1"><thead><tr><th>Per Visit Payment</th></tr></thead><tbody><tr><td><p style="text-align: right;">Initials</p><p>This option gives you more flexibility but costs more than monthly payments.</p><p>Payment is due the 10th of the month for the previous months work</p><p>Per Visit Cost: \$ «a amount» «a maximum» visits at \$«a amount» per visit = \$ «totalcontract»</p><p>Payment Instructions: Send no money now; Please sign and return.</p></td></tr></tbody></table> | Per Visit Payment | <p style="text-align: right;">Initials</p> <p>This option gives you more flexibility but costs more than monthly payments.</p> <p>Payment is due the 10th of the month for the previous months work</p> <p>Per Visit Cost: \$ «a amount» «a maximum» visits at \$«a amount» per visit = \$ «totalcontract»</p> <p>Payment Instructions: Send no money now; Please sign and return.</p> | OR | <table border="1"><thead><tr><th>Budget Billing In Monthly Payments</th></tr></thead><tbody><tr><td><p style="text-align: right;">Initials</p><p>This option allows you to have a pre-set amount billed each month and saves you 10%.</p><p style="text-align: center;">*SAVE 10%</p><p>Payment is due on the 10th of the month for the upcoming month. Cost will be divided in equal monthly payments from April through November.</p><p>«a maximum» visits at \$«a amount» per visit billed in «contractlength» monthly payments of \$ «monthlypayment» = «totalcontract» Savings of: \$ «monthlydiscountsavings» *Savings based on per visit price</p><p>Payment Instructions: Please sign agreement and enclose a check for \$ «monthlypayment» to begin service.</p></td></tr></tbody></table> | Budget Billing In Monthly Payments | <p style="text-align: right;">Initials</p> <p>This option allows you to have a pre-set amount billed each month and saves you 10%.</p> <p style="text-align: center;">*SAVE 10%</p> <p>Payment is due on the 10th of the month for the upcoming month. Cost will be divided in equal monthly payments from April through November.</p> <p>«a maximum» visits at \$«a amount» per visit billed in «contractlength» monthly payments of \$ «monthlypayment» = «totalcontract» Savings of: \$ «monthlydiscountsavings» *Savings based on per visit price</p> <p>Payment Instructions: Please sign agreement and enclose a check for \$ «monthlypayment» to begin service.</p> |
| Per Visit Payment | | | | | | |
| <p style="text-align: right;">Initials</p> <p>This option gives you more flexibility but costs more than monthly payments.</p> <p>Payment is due the 10th of the month for the previous months work</p> <p>Per Visit Cost: \$ «a amount» «a maximum» visits at \$«a amount» per visit = \$ «totalcontract»</p> <p>Payment Instructions: Send no money now; Please sign and return.</p> | | | | | | |
| Budget Billing In Monthly Payments | | | | | | |
| <p style="text-align: right;">Initials</p> <p>This option allows you to have a pre-set amount billed each month and saves you 10%.</p> <p style="text-align: center;">*SAVE 10%</p> <p>Payment is due on the 10th of the month for the upcoming month. Cost will be divided in equal monthly payments from April through November.</p> <p>«a maximum» visits at \$«a amount» per visit billed in «contractlength» monthly payments of \$ «monthlypayment» = «totalcontract» Savings of: \$ «monthlydiscountsavings» *Savings based on per visit price</p> <p>Payment Instructions: Please sign agreement and enclose a check for \$ «monthlypayment» to begin service.</p> | | | | | | |

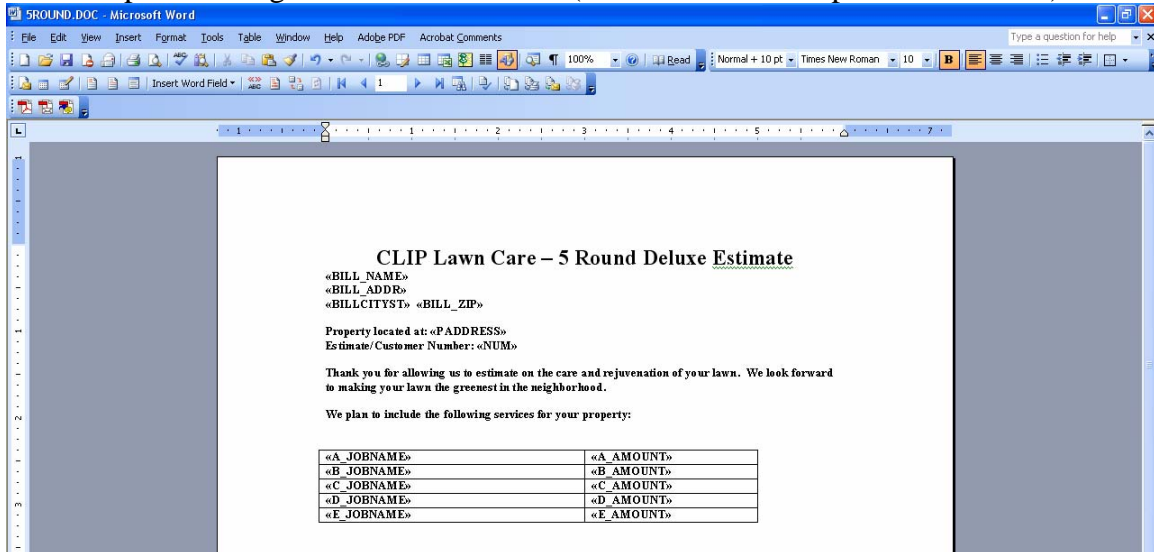
Here are the fields and what they mean:

- NUM= Customer Number
- NAME= Customer Property Name
- PADDRESS= Customer Property Address
- PCITY= Customer Property City
- PSTATE= Customer Property State
- PZIP= Customer Property Zip
- BWTEL= Work Telephone
- BHTEL= Home Telephone
- BILL_NAME= Customer Billing Name
- GREETING= Customer Greeting
- BILL_C_O= Customer Care Of
- BILL_ADDR= Customer Billing Address
- BILLCITYST= Customer Property City & State
- BILL_ZIP= Customer Property Zip
- ESTIMATENOTES=
- TOTALCONTRACT = the total price for the contract, including the discounts.
- CONTRACTTAX = Sales Tax on the contract, if any.
- TOTALCONTRACTWITHTAX = Total with the tax
- TOTALCONTRACTWITHOUTDISCOUNT= Total price without a discount
- CONTRACTLENGTH = Number of months that this contract will go.

MONTHLYPAYMENT = Monthly Payment for the customer.
 MONTHLYDISCOUNTPCT = Percentage of discount if the customer chooses the
 MONTHLY= (2 = 2%)
 MONTHLYDISCOUNTSAVINGS = Dollar amount of the savings.
 TOTALNONCONTRACT = the total for the non-contract jobs
 NONCONTRACTTAX = Tax on the non-contract jobs
 TOTALNONCONTRACTWITHTAX = Total with tax
 EARLYPAYDISCOUNT = the discount if the customer pays early. (In percent – 5 = 5%)
 EARLYPAYDEADLINE = The date that the early pay is due.
 EARLYPAYDISCOUNTAMOUNT = The dollar amount of savings.
 TOTALPRICE = Totals for all of the jobs.
 TOTALTAX = The tax for the whole contract
 TOTALWITHTAX = Total for contract with Tax
 A_JOBNUMBER = Job number for the first job
 A_JOBNAME = Job Name of the first job
 A_MINIMUM= Minimum for the first job
 A_MAXIMUM = Max for the first job
 A_AMOUNT = Charge per job for the first job
 A_ADJUST = Charge over max for the first job
 A_AREA = Area for the first job
 B_JOBNUMBER = Job number for the second job.

The jobs go up to FF_JOBNUMBER which means a total of 36 jobs can be included in the estimate.

If you are showing a list of jobs the easiest way to get things to line up is to insert a table and then put the merge fields into the table. (Consult Word's help for instructions)



If your fields are not formatting correctly, i.e.: They do not show the proper decimal places or the dollar sign; follow the instructions below before doing the merge.

Use Dynamic Data Exchange

Dynamic Data Exchange (DDE) is one method available in the Microsoft Windows® operating system for transferring data between applications. It uses shared memory to exchange the data. If you use other data transfer methods, you run into a problem: Data from the worksheet is transferred in the native format in which Excel stores it rather than with the formatting that you applied in the worksheet cells.

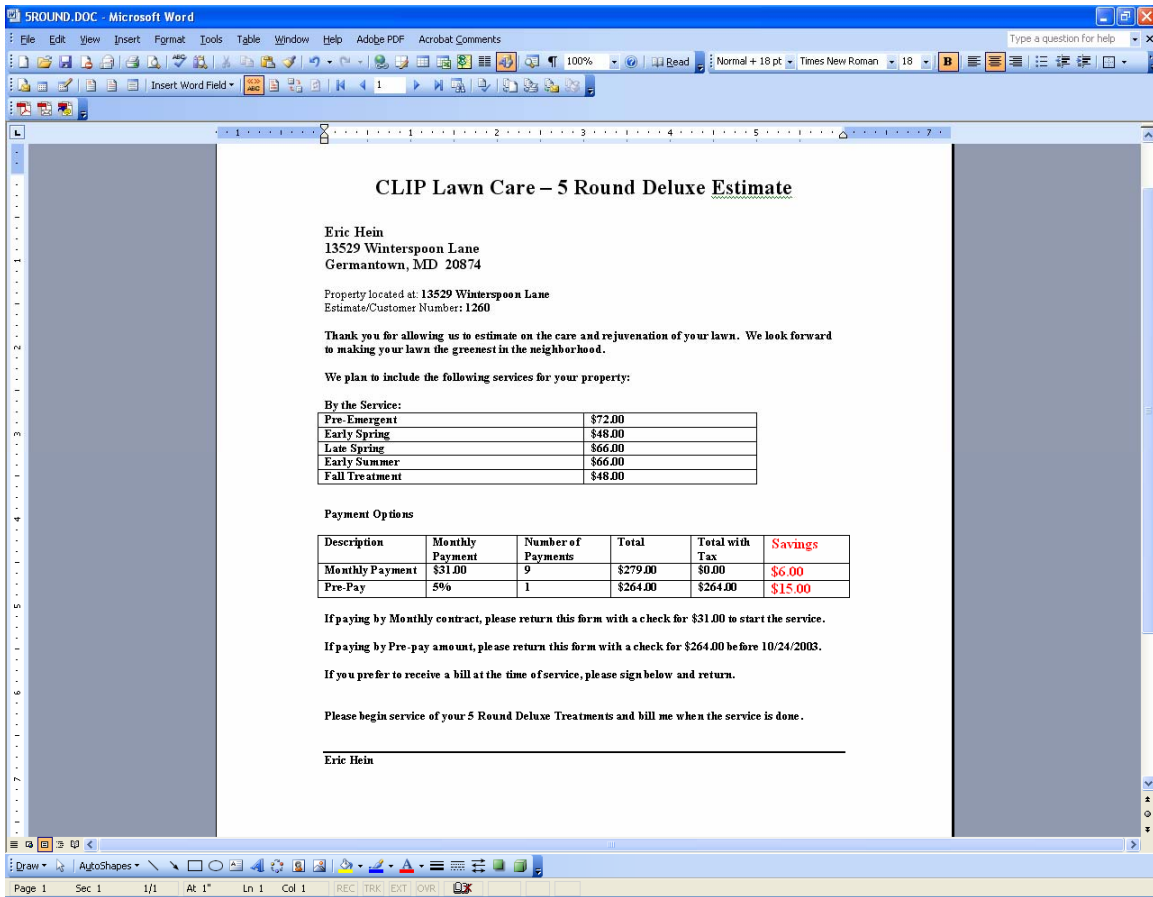
To choose the DDE data transfer method when you're connecting to an Excel worksheet during a mail merge, all you have to do is select one check box in Word:

1. On the **Tools** menu, click **Options**, and then click the **General** tab.
2. Click **Confirm conversion at Open**.

At the step in the mail-merge process when you connect to your data file, after you locate the Excel worksheet you want to connect to, the **Confirm Data Source** dialog box opens. Click **MS Excel Worksheets via DDE (*.xls)**, and then click **OK**. In the **Microsoft Excel** dialog box, for **Named or cell range**, select the cell range or worksheet that contains the information you want to merge, and then click **OK**. The numbers from the Excel spreadsheet will now look exactly the same in your merged documents as they look in the worksheet cells.

Note: It's probably a good idea to turn off the **Confirm conversion at Open** option after you finish your mail merge. Otherwise, you might be prompted to confirm your data source at times when that's the last thing you want to worry about.

(This information was taken from the Microsoft Help Website.)

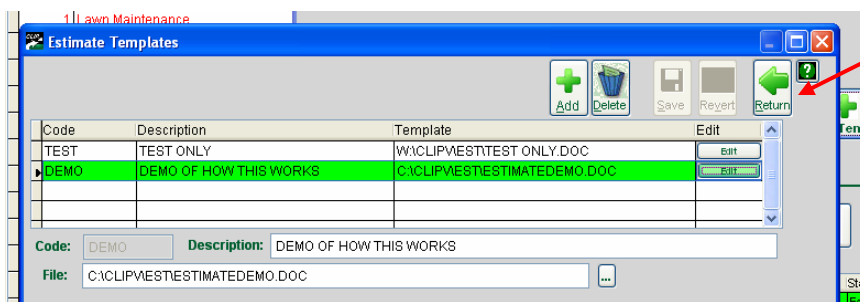


You can add some color and maybe a logo or picture.

Save your estimate.

Close Word and Excel

Go back into CLIP



Select "Return"

You can repeat this process for each type of estimate you want to make.

MAKING AN ESTIMATE

In the Job Details Screen you have an option to include or not include the job in the estimating function. Make sure that at least one job is marked as “Include”.

File Maintenance for customer: TANG, JENNY
1009 TANG, JENNY
13910 Rockingham Rd

Customer Jobs Projects History Financials Correspondence Programs

Jobs Job Detail Schedule Notes Materials/Job Costs Pictures

Job # 1 Pattern Parent: Lawn Maintenance

Job Description: Lawn Maintenance

Job Category: Job Change

Job SubCategory: Min Max Due to Date: Chrg. Our Max
[x] Times 20 20 20 22.50
[] Qty Qty Unit

Job Type: Charge per Job: 22.50 Calc 1 Discount Discount Applied

Last Year Price: 0.00 Man Hour Rating: 0.58 Calc 2 Man Hour

JB Custom Numerical: 0.00 Charge Per Hour: 40.00 Bill Type: [Include in Contract (C)]

Crew Number: 3 Job Area: 4.125

Routing Sequence: 5420 Tax Type: 0

Map Location: 18-B6 Average Time: 0.36 Calc

Estimate Code: TEST [x] Include in Estimate Materials/Shop Cost: 0.00

Invoice #: 0

Date Printed: Salesman: Sold Date: Credit: 4001 Mowing Contract

Commission Rate: 0.00 Debit: 4020 Contract Clearing Debit

Last Job Performed: 11/07/07 [] Show Active Jobs Only Create Estimate Date of last estimate: 11/28/2007

Select “Create Estimate” button

Estimate Mail Merge

TANG, JENNY

Date of last estimate: 11/28/2007

Step 1 - Choose the Template

| | |
|------|------------------------|
| TEST | TEST ONLY |
| DEMO | DEMO OF HOW THIS WORKS |

Add Edit Templates

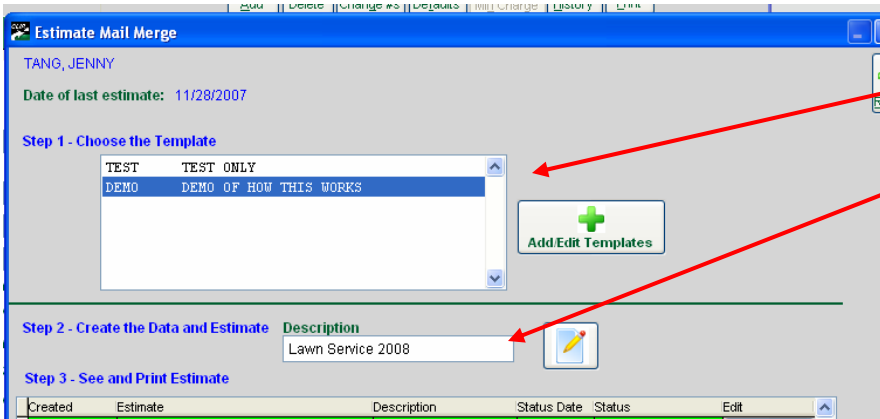
Step 2 - Create the Data and Estimate Description

Step 3 - See and Print Estimate

| Created | Estimate | Description | Status Date | Status | Edit |
|----------|---------------------------|-------------|-------------|-----------|------|
| 11/28/07 | C:\CLIP\EST11009_TEST.DOC | Test only | 11/28/07 | Estimated | View |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

[] Show Active Jobs Only Create Estimate Date of last estimate: 11/28/2007

Select the template you want to use.



Enter in a description for the individual estimate

Select the Information  button.



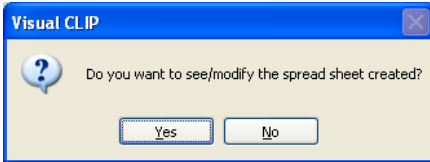
CLIP will gather the information from the job list, summarize it and allow you to choose what jobs you want to include.



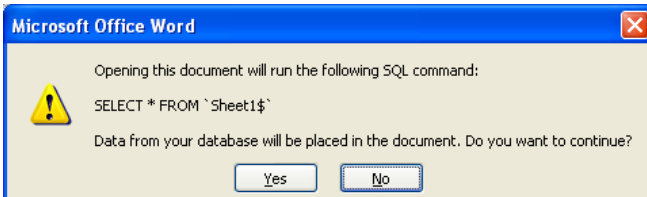
If you assigned the job an “Estimate Code” in the Job Details tab it will already be checked off to be “Included” otherwise you can select the jobs you want.

Select the Number of Months (Installment), Discount for Monthly or Discount for Early Pay (prepay discount)

Select the “Continue” button.



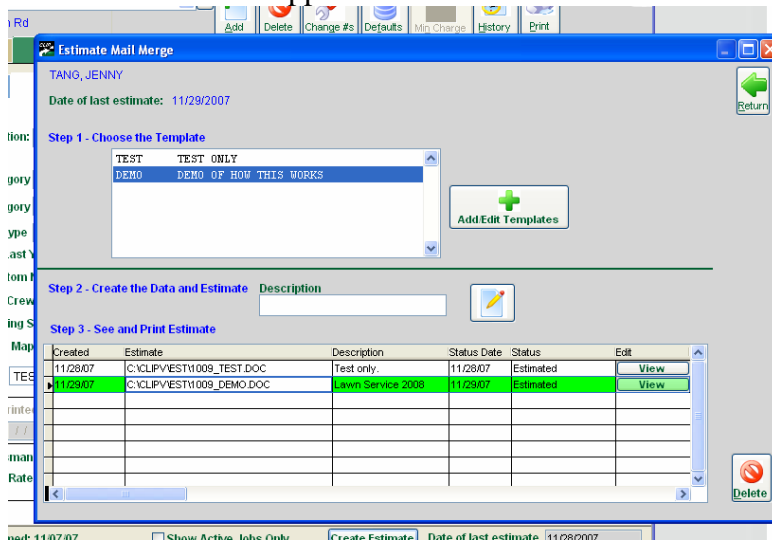
If you want to see the Excel spreadsheet with the data that CLIP created, click Yes on the following dialog:



Depending on your version of Word, you might see the following:

Select “YES”

A new estimate will appear:



Select the "View" button.

Proposal for 2008

Prepared for:
Jeremy Tang
12910 Rockingham Rd
Germantown, MD 20874

Date: Dear Jeremy Tang

Thank you for being our customer for this past season.

Here are your options for the upcoming 2008 season, please choose one and return to:

CLIF Lawn Care
215 West Patrick Street
Frederick, MD 21701

| | |
|--|---|
| <p>Per Visit Payment</p> <p>This option gives you more flexibility but costs more than the monthly payment.</p> <p>Payment due on the 15th of the month for the previous month's work.</p> <p>Per Visit Cost: \$22.00</p> <p>Normally, the number of visits will be between 20 and 25 times in a season which would equal \$500.</p> <p>Payment instructions: Send me money now, simply sign and return.</p> <p>Signature _____</p> | <p>Budget Billing Monthly Payment</p> <p>This option allows you to have a pre-set amount billed each month and save you 10%.</p> <p>Payment is due on the 15th of the month for the upcoming month. Cost will be divided to equal monthly payments from April through November.</p> <p>24 visits at \$22.00 per visit Billed in 8 monthly payments of \$70.00 + \$307.00 Service of \$50.00</p> <p>*Foreign banks may pay with price.</p> <p>Payment instructions: Please sign below and include a check for \$70.00 to begin service.</p> <p>Signature _____</p> |
|--|---|

Word will open and display the estimate.

You can make any manual changes you like. Make sure to "Save" if you make changes.

You can print it or email it as necessary.

CLIP Lawn Care LLC 2004 Annual Maintenance Agreement
Prepared for: Eric Hein

Choose a payment plan and initial

| Per Visit Payment | Budget Billing in Monthly Payments |
|---|--|
| Initial | Initial |
| This option gives you more flexibility but costs more than monthly payment. | This option allows you to have a pre-set amount billed each month and saves you 10%. |
| Payment is due the 10 th of the month for the previous month's work. | *SAVE 10% |
| Per Visit Cost: \$432.40 17 visits at \$432.40 per visit = \$183,508.00 | Payment is due on the 10 th of the month for the upcoming month. Cost will be divided in equal monthly payments from April through November. 27 visits at \$332.40 per visit = billed in 9 monthly payments of \$390.40 = \$3513.60 Savings of \$1817.50 *Savings based on per visit price |
| Payment Instructions: Send no money now, Please sign and return. | Payment Instructions: Please sign agreement and enclose a check for \$_____ to begin service. |

OR

____ I am interested in Leaf Removal. Please contact me in the fall.

____ I am NOT interested in leaf removal by Clip Lawn Care. I understand that leaves must be off all turf areas before mowing is begun. Any leaf removal completed by Clip Lawn Care will be billed at a rate of \$40.00 per man per hour, and \$1.00 for each bag used.

ACCEPTANCE: I request "Clip Lawn Care" provide maintenance services as proposed. There is included next to the Payment Plan that I choose for the 2004 season.

| Production Operator Signature | Date | Clip Lawn Care Representative | Date |
|--|------|-------------------------------|------|
| Terms and Conditions | | | |
| <ol style="list-style-type: none"> 1. Billing statements will include work done and amount due for each month. 2. Monthly Payments are due at "Clip Lawn Care" by the 10th day of each month. 3. Late fees on payments past the 10th day of the month will be \$20.00 per month (unless you are a partner). 4. Cancellations can be cancelled with 30-day notice unless stated otherwise. (upon Notice of Cancellation, amount owed for work performed prior to Notice of Cancellation will be billed immediately, in full.) 5. If you are not the monthly production operator, you cannot pay our bills. (We will bill you until we are notified you are no longer the operator.) 6. If you need this estimate and require any changes, you must be notified that the invoice you received, including contract and list of services you want to be changed. If the items are accepted at your request and the final terms to be completed on our invoice are those in this invoice, you agree to accept the additional time needed to perform requirements. 7. Substitutions are not to exceed one per hour due to unavailability conditions (especially weather) we cannot specify an exact date and time of service. | | | |

SATISFACTION GUARANTEED! If at any time during the life of this agreement, you find that our work does not meet or exceed your expectations, we will make it right at no additional cost!

800.774.2547 • 9639 Dr Perry Rd #123 • Hagerstown • MD • 21754
KEEP THIS COPY FOR YOUR RECORDS

CLIP will keep a reference to this Word file and you can go back and see what you estimated before. That way, if a customer calls you with questions, you can go back and look at it.

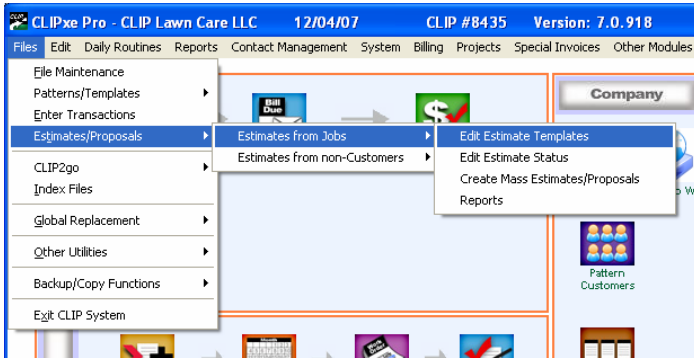
If prices change, change the price in Job details and then Re-Create the estimate.

Set up your Pattern Jobs

The easiest way to use this would be to setup your pattern jobs with the correct Estimate Codes. Then you would just change the "Charge" and make the estimate.

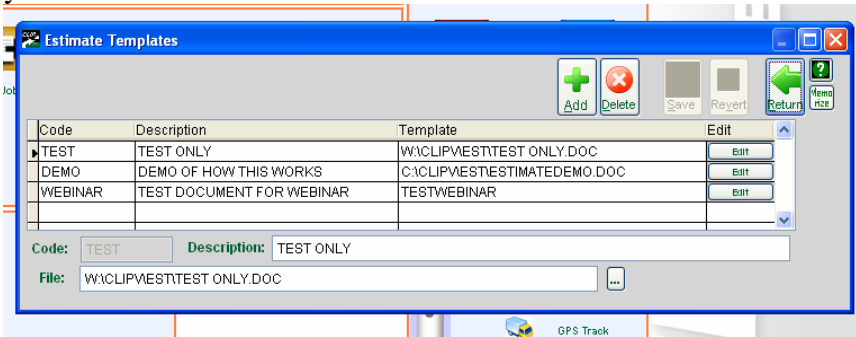
Doing estimates on a massive scale

Once you are comfortable with this process and you have created a good template for your customers, you will want to be able to create estimates for all of your customers. You can do that from the menu:



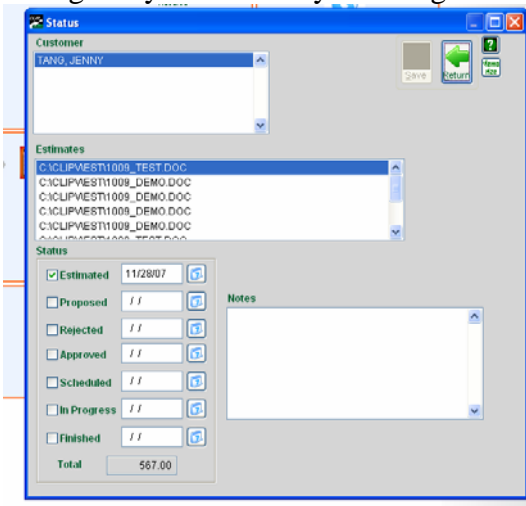
From here you have four options:

Edit Estimate Templates: this gives you the opportunity to edit the estimate templates that you have created.



Edit Estimate Status:

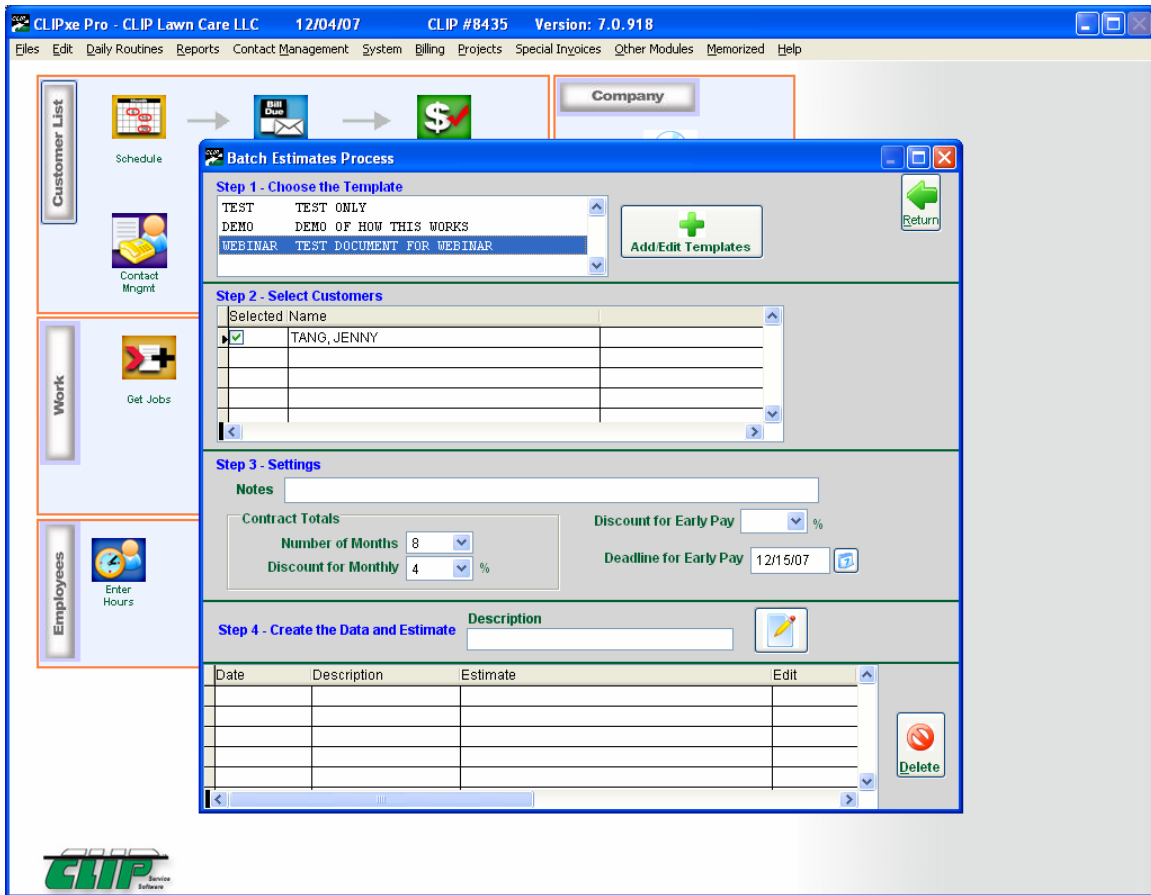
This gives you the ability to change the status of an estimate, as they come back to you:



You can add notes that tell you where the process is at the moment.

Create Mass Estimates/Proposals

This allows you to actually run the Estimate builder for a set of customers. Helping you to create massive amounts of estimates in minutes.



Please note that only the customers that have jobs that have the Estimate code in them will be listed in the second step:

File Maintenance for customer: TANG, JENNY

1009 TANG, JENNY
13910 Rockingham Rd

Customer Jobs Projects History Financials Correspondence Programs

Jobs Job Detail Schedule Notes Materials/Job Costs Pictures

Job # 1 Pattern Parent: Lawn Maintenance

Job Description: Lawn Maintenance

Job Category: [Dropdown] Job SubCategory: [Dropdown] Job Type: [Dropdown]

Last Year Price: 0.00 JB.Custom Numerical: 0.00 Crew Number: 3 Routing Sequence: 6420 Map Location: 18-B6

Estimate Code: WEBINAR [Dropdown] Include in Estimate

Invoice #: [Dropdown] Date Printed: [Dropdown]

Salesman: [Dropdown] Sold Date: [Dropdown] Commission Rate: 0.00

Charge per Job: 22.50 Calc1 / Discount Discount Applied
Man Hour Rating: 0.56 Calc2 \$Man Hour
Charge Per Hour: 40.00 Bill Type: Include in Contract [C]
Job Area: 4,125 Tax Type: D
Average Time: 0.36 Calc
Materials/Subs Cost: 0.00

Min: 28 Max: 28 One to Dte: 28 Chrg. Ovr Max: 22.50
Qty: [Dropdown] Unit: [Dropdown]

.1 = 6 minutes
.25 = 15 minutes
.50 = 30 minutes
.75 = 45 minutes

Credit: 4001 Mowing-Contract
Debit: 4020 Contract Clearing-Debit

Last Job Performed: 11/07/07 Show Active Jobs Only Create Estimate Date of last estimate 12/04/2007

Reports:

The reports function will allow you to follow the progress of the estimate.

Estimate Reports

Select Customers: [Select All] [Unselect All]

Selected Name: [Dropdown] TANG, JENNY

Select Date Filter:
 All Dates
 Between [Dropdown] [Dropdown]

Select Report:
 Status Report
 Status by Customer [Print/Preview]

Sold Date: [Dropdown] Credit: 4001 Mowing-Contract