

# Installation - Start Here

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## Import from Excel

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

1. Open Excel. You can find a sample excel sheet on [www.clip.com](http://www.clip.com) under Updates-Utilities
2. You will need to get your existing 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. This will create a placeholder if you do not have date for that column.

You can also go to [www.clip.com/product\\_manuals.html](http://www.clip.com/product_manuals.html) and look under "Miscellaneous Manuals/Guides" to get an excel template with all the columns created.

Legend:

D = Date format 01/01/2010

C = it can contain letters and numbers

N = it can only contain numbers

The number after the (C) or (N) tells how many characters that field can hold. For numbers if it has a comma then another number, this tells you how many decimal places the number can have i.e. N(12,2), this means you can have a number up to 999999999.99.

////////////////////////////////////Visual CLIP////////////////////////////////////

**Column A**= ID (This is the customer number, and it is mandatory that a unique number be filled in) N(5)

**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) C(50)

**Column C**= Bill Name (Use normal name format first & last name) C(65)

**Column D**= Bill Care of (If an extra address line is needed otherwise CLIP will ignore blanks when printing) C(35)

**Column E**= Bill Address (Billing street address) C(65)

**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. C(45)

**Column G**= Bill Zip C(12)

**Column H**= Tax ID (This will normally be the same as the State-This is a mandatory field) C(2)

**Column I**= Property Address C(50)

**Column J**= Property City C(42)

**Column K**= Property State C(2)

**Column L**= Property Zip C(12)

**Column M**= Home Tele C(25)

**Column N**= Work Tele C(25)

**Column O**= Fax number C(25)

**Column P**= Email Address C(50)

**Column Q**= Credit Limit (This must be a number-if you do not want to use this feature put 99999 in all customers fields) N(12,2)

**Column R**= Service Charge (This must be either a Capitol Y or N- This is a mandatory field) C(1)

**Column S**= User Defined Date (Optional: this can be any date that you want to track.) D(8)

**Column T**= Custom Characters (Optional info from your Excel sheet that is not covered with one of the other fields) C(10)

**Column U**= Type (Optional to tell what type of customer ie I-irrigation, M=mowing) C9(5)

**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 C(1)

**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)X= pager C(15)

**Column Y**= Additional Phone #1 C(15)

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**Column Z**= Additional Phone #2 C(15),  
**Column AA**= Customer Start Date D(8),  
**Column AB**= Last Activity Date D(8),  
**Column AC**= Latitude of Customers Property N(9,5) ;  
**Column AD**= Longitude of Customers Property N(9,5),  
**Column AE**= Customer Default Map Location C(10),  
**Column AF**= Default Program Sq Footage N(12,3),  
**Column AG**= Default Program Crew N(4),  
**Column AH**= Default Program Route N(8),  
**Column AI**= Default Job Crew N(4),  
**Column AJ**= Default Job Route N(8);  
**Column AK**= Statement Note C(50),  
**Column AL**= Custom Field #1 C(15),  
**Column AM**= Custom Field #2 C(15),  
**Column AN**= Custom Field #3 C(15),  
**Column AO**= Custom Field #4 C(15),  
**Column AP**= Custom Number #1 N(12,2),  
**Column AQ**= Custom Number #2 N(12,2) ;  
**Column AR**= Custom Date #1 D(8),  
**Column AS**= Custom Date #2 D(8),  
**Column AT**= Custom Date #3 D(8),  
**Column AU**= Custom Date #4 D(8))

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

10. Select "Yes"

11. Locate the Excel file you made

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.

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

The <PageUp> and <PgUp> keys are the same. The <Page Down> and <PgDn> keys do the same function.

The <Control> (or <Ctrl>) key is called a "modifier." It is only used in conjunction with another key. Holding it down as you press another key modifies the regular function of the second key.

Example: If you have text selected and hold the <Ctrl> key down and press the letter <C>, the computer will interpret it as the "copy text" command and will place the selected text on your **CLIP**board.

The <Alt> key is another modifier used only in conjunction with another key.

### Click

When the word "Click" is used in this manual it refers to pushing your left mouse button. You may also tab (or use the arrow keys) to the desired field and press <Enter> to accomplish the same function.

### Keystrokes

You will notice as you move around in **CLIP** that several different keys often function similarly. For instance, in several screens you may select an option by using your arrow keys or <Tab> to move the highlight to that option and press <Enter>. Or you may just type in the letter that is underlined in that option while holding the <Alt> key down to move directly into the next screen (such as "A" to **Add Customer** in **File Maintenance**).

When you are in edit mode you should always use the <Tab> key to move from field to field. A mouse is generally a slower method of selecting an item, but if you are only making a few edits to a screen, it is often faster to use a mouse to jump down to a field than it is to use your <Tab> key.

### Cursor

You can find where you are on the screen by locating the blinking vertical line. This line is called a cursor.

### Answering questions **CLIP** asks

Quite often, **CLIP** will give you a suggested (default) answer in a field where it is asking you to enter information. This is to speed your work along by allowing you to just press <Enter> rather than clicking or typing.