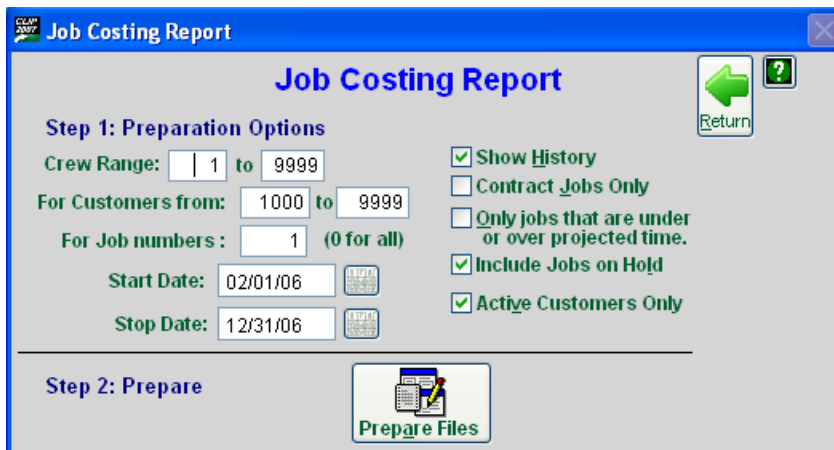
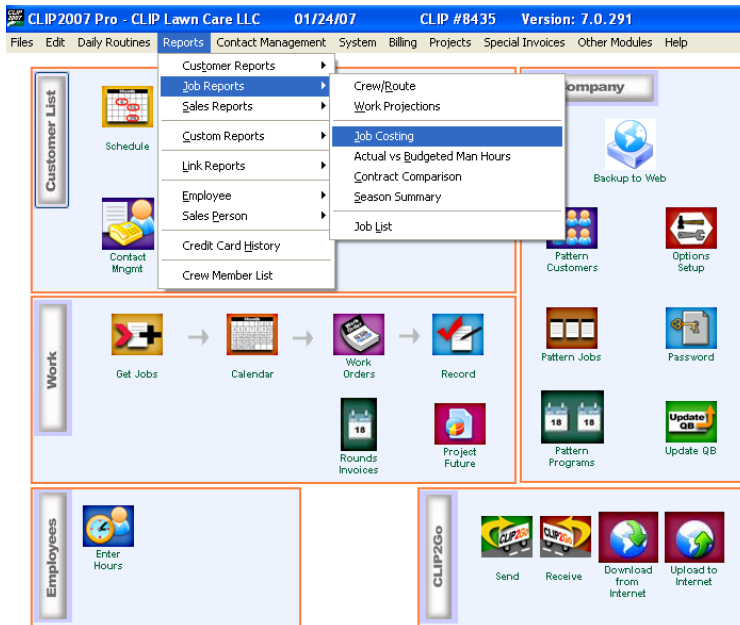


Steps Making Contracts:

First, Create a new folder under W:\CLIP Lawn Care\Documents create a title for the current year (ex. 2007 Contract Stuff)

The next thing will be to find any bad entries that would cause the Job Costing report to be off such as times entered wrong or travel time entered wrong.

Run the job costing report in CLIP with the following settings and the dates set for the previous year (02/01/xxxx – 12/31/xxxx)



Press Prepare Files. Wait for the files to process.

Job Costing Report

Step 1: Preparation Options

Crew Range: to

For Customers from: to

For Job numbers: (0 for all)

Start Date:

Stop Date:

Show History
 Contract Jobs Only
 Only jobs that are under or over projected time.
 Include Jobs on Hold
 Active Customers Only

Step 2: Prepare

Prepare Files

Step 3: Print

Sort Options:

Sort By:

- Number
- Name
- Customer, Crew
- Crew
- Sort by Dollars per Hour
- Sort by Travel time
- Sort by Dollars/Hr Including Travel time

Print Options:

- Detail
- Summary

Preview/Print To EXCEL To MapPoint

Red if Below
Yellow in between
Green if Above

Select the Detail Print Option and Sort by Dollars/Hr Including Travel Time. Print the report.

NOMALAYA, ANTONIO

(The information in this box is taken from the job record, not the history. To see an historical perspective, see the history below.)

		Man Hour Rating							
		From Job.							
2186-1	Lawn Maintenance			0.00	0.74	-0.74		0.00	
Date	Done #	Budget Time	Actual Time	Dif.	Charge	Cl amount	Material Cost	Travel Time	
07/12/06	1	0.68	0.74	-0.06	0.00	0.00	-	1.50	
Totals: Average \$/hour		0.00	Avg. Hrs 0.74	0.74	-0.06	0.00	0.00	-	1.50
Totals for NOMALAYA, ANTONIO		Avg \$/hour 0.00	Avg. Hrs 0.74	0.74	-0.06	0.00	0.00	-	1.50
		Avg \$/hour Including Travel Time:		0.00					

Look for any numbers that seem way too high and highlight them. Only look through the customers that have a Avg \$/hour including travel time as less than the company's current goal (ex. \$40 per hour).

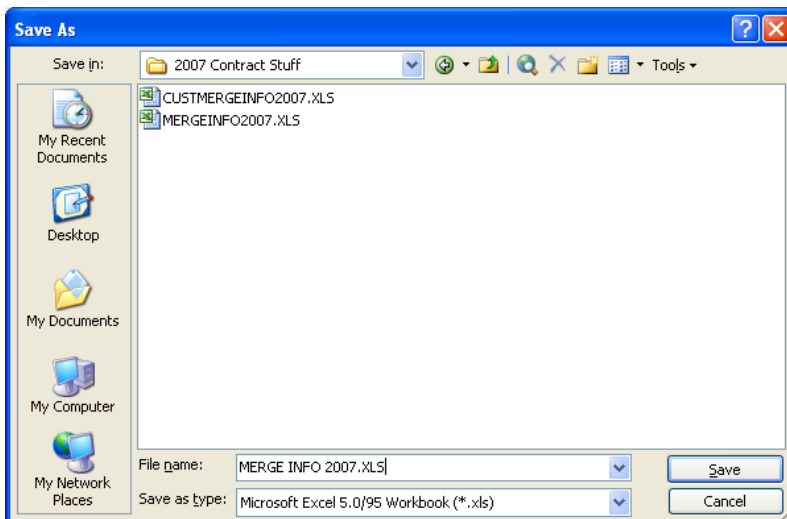
Go into the customers' history and edit the history for each of the time's highlighted.



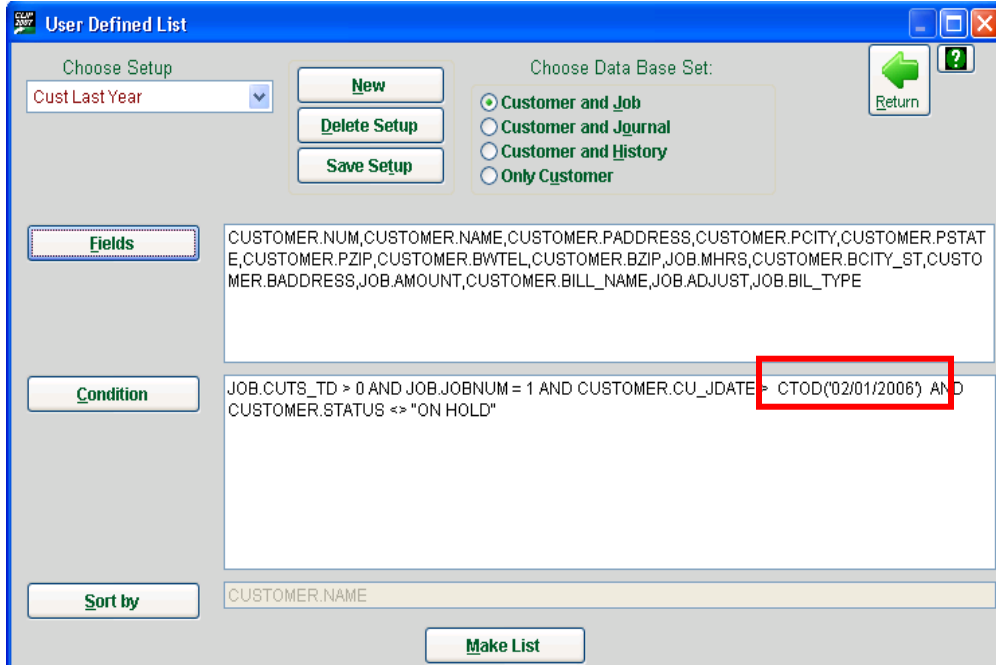
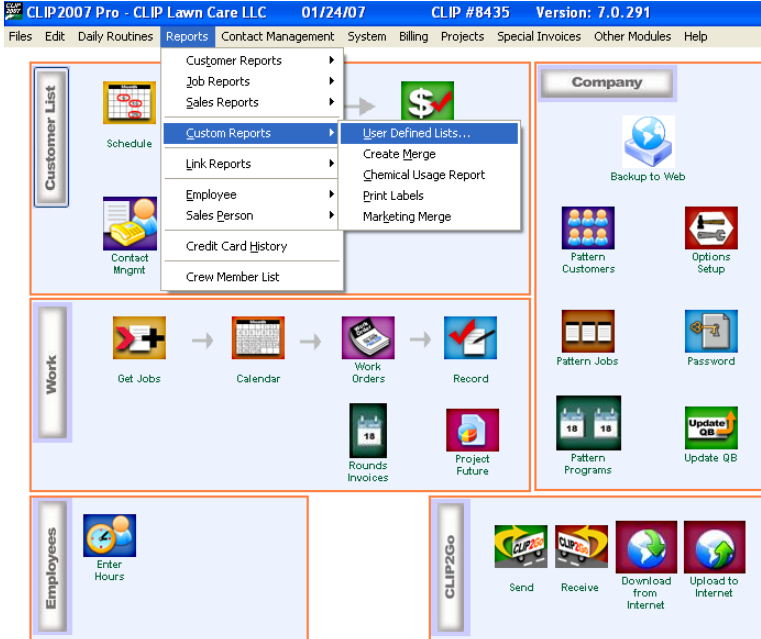
Run the report again but do the Summary Report and output to Excel.

Sort the spreadsheet by customer number.

Save the sheet in the folder created earlier as: *MERGE INFO 2007.xls* (or the current year).



Next you will need to make a report containing more customer, billing, and job information because the job costing report does not contain all the data you need. Go into the custom reports section and select the Report titled: *Cust Last Year*



The Fields should be as follows:

CUSTOMER.NUM,CUSTOMER.NAME,CUSTOMER.PADDRESS,CUSTOMER.PCI
TY,CUSTOMER.PSTATE,CUSTOMER.PZIP,CUSTOMER.BILL_NAME,CUSTOME
R.BADDRESS,CUSTOMER.BCITY_ST,CUSTOMER.BZIP,JOB.AMOUNT,JOB.ADJ
UST,JOB.BIL_TYPE,JOB.CUTS_TD

The Condition should be as follows:

CUSTOMER.STATUS <> "ON HOLD" AND CUSTOMER.CU_JDATE >
CTOD('02/01/2007') AND JOB.CUTS_TD > 0 AND JOB.JOBNUM = 1

Change the date in the condition to the previous year.

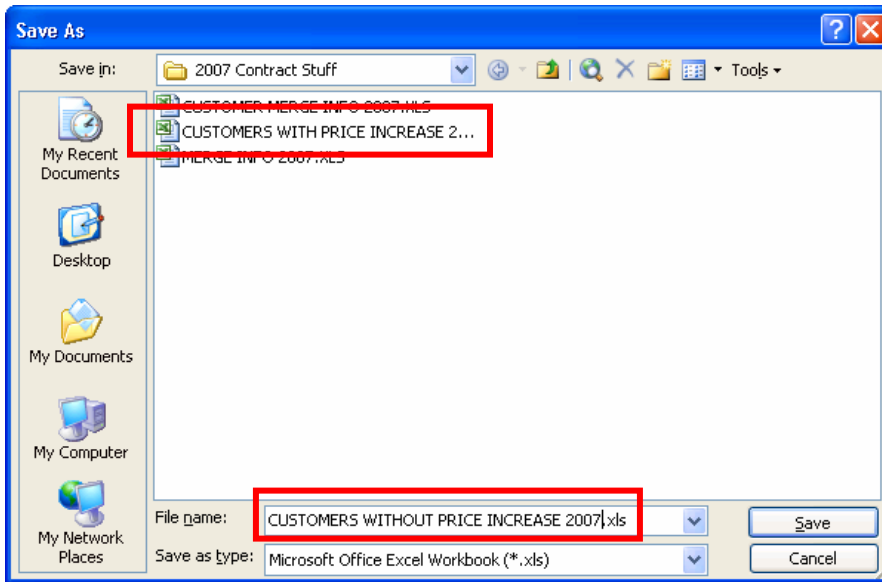
Press Make List and Export the list to Excel. Save as *CUSTOMER MERGE INFO
2007.XLS* in the folder created earlier. Open the file and sort it by customer number.

Cut and Paste the customer information from this spreadsheet to *MERGE INFO 2007.xls*
(look at this file for an example of how to organize the data: [W:\CLIP Lawn
Care\Documents\2007 Contract Stuff\MERGE INFO 2007.xls](#))

	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
	city	pstate	pzip	bill_name	baddress	bcity_st	bbip	Total Amount	Total Hours	Total Material Cost	Dollars per hour	\$/hr Inc.	Travel Time	Avg Man Hrs	Travel	amount	adjust	mths
1	Potomac	MD	20854	Galt Roseman	10812 Hillbrooke Lane	Potomac, MD	20854	\$23.00	0.8	0.69	\$0.00	\$28.75	\$15.44	0.8	1.49	\$23.00	\$23.00	0.58
2	North Potomac	MD	20878	Kevin Dales	6 Arlington Court	North Potomac, MD	20878	\$30.00	0.96	0.34	\$0.00	\$31.25	\$16.87	0.96	1.3	\$30.00	\$30.00	0.75
3	Boggs	MD	20841	Tenille Ademiulji	14521 Eubbling Spring Road	Boggs, MD	20841	\$26.00	1.4	0.06	\$0.00	\$19.57	\$17.81	1.4	1.46	\$26.00	\$26.00	0.65
4	Germanntown	MD	20876	Elmer Eveseter	21521 Manor View Circle	Germanntown, MD	20876	\$22.50	1.07	0.14	\$0.00	\$21.03	\$18.60	1.07	1.21	\$22.50	\$25.00	0.56
5	Germanntown	MD	20876	Noung Huhnh	20941 Scottsburg Drive	Germanntown, MD	20876	\$25.00	1.2	0.06	\$0.00	\$20.83	\$19.84	1.2	1.26	\$25.00	\$25.00	0.63
6	Urbana	MD	21704	Pat Ridgley	3629 Lew Wallace Street	Urbana, MD	21704	\$180.00	3.37	5.21	\$0.00	\$53.41	\$20.98	0.56	1.43	\$30.00	\$30.00	0.75
7	Boggs	MD	20841	Frank Prescott	14601 Bubbling Springs Road	Boggs, MD	20841	\$26.00	1.07	0.16	\$0.00	\$24.30	\$21.14	1.07	1.23	\$26.00	\$26.00	0.6
8	Friedrick	MD	21704	Eleanor White	3903 Kendall Drive	Friedrick, MD	21704	\$75.00	1.98	2.06	\$0.00	\$54.05	\$21.80	0.46	1.95	\$25.00	\$25.00	0.63
9	Damascus	MD	20872	Dan Cos	10818 Avonlea Ridge Place	Damascus, MD	20872	\$800.00	25.22	11.31	\$0.00	\$31.72	\$21.90	1.58	2.28	\$50.00	\$50.00	1.25
10	Gaithersburg	MD	20878	Debra Tallman	10 Seville V'ag	Gaithersburg, MD	20878	\$60.00	1.44	1.2	\$0.00	\$41.67	\$22.73	0.72	1.32	\$30.00	\$30.00	0.75
11	Germanntown	MD	20874	Anita Mishra	13602 Molasses Run Drive	Germanntown, MD	20874	\$25.00	0.54	0.54	\$0.00	\$46.30	\$23.15	0.54	1.08	\$25.00	\$25.00	0.63
12	Boggs	MD	20841	Flam Nanula	18326 Fable Drive	Boggs, MD	20841	\$896.00	27.75	10.75	\$0.00	\$32.29	\$23.27	0.99	1.38	\$32.00	\$32.00	0.9
13	Germanntown	MD	20874	Paul Haganum	19325 Ranworth Drive	Germanntown, MD	20874	\$27.00	0.76	0.4	\$0.00	\$35.53	\$23.29	0.76	1.16	\$27.00	\$27.00	0.68
14	Gaithersburg	MD	20877	Jpn Schaefer	3 Duwall Lane	Gaithersburg, MD	20877	\$630.00	8.78	17.52	\$0.00	\$71.75	\$23.95	0.31	0.94	\$22.50	\$25.00	0.56
15	Montgomery Village	MD	20886	Gregory Kage	20320 Aspenwood Lane	Montgomery Village, MD	20886	\$810.00	0.88	2.5	\$0.00	\$92.05	\$23.86	0.29	1.13	\$27.00	\$27.00	0.68
16	N. Potomac	MD	20878	Jeremy Janszen	11005 Velland Street	N. Potomac, MD	20878	\$234.00	4.65	5.01	\$0.00	\$50.32	\$24.22	0.52	1.07	\$26.00	\$26.00	0.65
17	Gaithersburg	MD	20878	Rieza Flatie	11712 Cherry Grove Drive	Gaithersburg, MD	20878	\$195.00	3.1	1.62	\$0.00	\$37.10	\$24.36	0.62	0.94	\$23.00	\$23.00	0.58
18	Montgomery Village	MD	20886	Bela Meghary	9637 Dellecastle Road	Montgomery Village, MD	20886	\$225.00	4.88	4.34	\$0.00	\$46.11	\$24.40	0.54	1.02	\$25.00	\$25.00	0.63
19	Gaithersburg	MD	20878	Brian Fitzgerald	11501 Pegasus Drive	Gaithersburg, MD	20878	\$84.00	2.85	0.58	\$0.00	\$29.47	\$24.49	0.95	1.14	\$28.00	\$28.00	0
20	Gaithersburg	MD	20878	Anthony Jackson	9008 Roundleaf V'ag	Gaithersburg, MD	20878	\$207.00	5.63	2.8	\$0.00	\$36.77	\$24.56	0.63	0.94	\$23.00	\$23.00	0.58
21	Darnestown	MD	20878	Jeffrey Ott	13 Apricot Court	Darnestown, MD	20878	\$729.00	19.55	10.13	\$0.00	\$37.29	\$24.56	0.72	1.1	\$27.00	\$27.00	1.15
22	Rockville	MD	20850	Jose Guerrier	1533 Baylor Ave	Rockville, MD	20850	\$589.68	9.96	14.01	\$0.00	\$59.20	\$24.60	0.36	0.86	\$21.00	\$21.00	0.53
23	North Potomac	MD	20878	Chris Appleton	12503 DeGas Court	North Potomac, MD	20878	\$522.00	7.87	13.7	\$0.00	\$67.60	\$24.66	0.41	1.14	\$28.00	\$28.00	0.7
24	Boggs	MD	20841	Randy Zakalik	14207 Autumn Crest Road	Boggs, MD	20841	\$70.20	1.67	1.12	\$0.00	\$42.04	\$25.16	0.84	1.4	\$25.00	\$25.00	0.75
25	Potomac	MD	20854	Elizabeth Garzon	11 Elbeberg Ridge Court	Potomac, MD	20854	\$684.00	12.17	1.35	\$0.00	\$56.20	\$25.73	0.41	0.88	\$22.80	\$22.80	0.57
26	Montgomery Village	MD	20886	Jane Hatch	20448 Aspenwood Lane	Montgomery Village, MD	20886	\$115.00	2.16	2.28	\$0.00	\$53.24	\$25.84	0.43	0.89	\$23.00	\$23.00	0.58
27	Rockville	MD	20854	Peter Sun	103 Varkins Circle	Rockville, MD	20854	\$652.50	10.75	14.4	\$0.00	\$60.70	\$25.94	0.37	0.87	\$22.50	\$22.50	0.56
28	North Potomac	MD	20854	Seema Schappelle	10818 Hillbrooke Lane	North Potomac, MD	20854	\$338.00	3.24	3.63	\$0.00	\$36.58	\$26.26	0.71	0.99	\$26.00	\$26.00	0.65
29	Germanntown	MD	20874	Peter Lal	13613 Hartsbourne Drive	Germanntown, MD	20874	\$590.40	16.46	3.3	\$0.00	\$41.34	\$26.41	0.61	0.95	\$25.20	\$25.20	0.63
30	Gaithersburg	MD	20878	Vernon Stewart	18851 Chesley Knoll Drive	Gaithersburg, MD	20878	\$50.00	2.45	0.95	\$0.00	\$36.73	\$26.47	0.82	1.13	\$30.00	\$30.00	0.75
31	Gaithersburg	MD	20878	Mark Weiss	102 Manette Court	Gaithersburg, MD	20878	\$696.00	11.03	15.19	\$0.00	\$63.10	\$26.54	0.38	0.9	\$24.00	\$24.00	0.6
32	Gaithersburg	MD	20878	Steve Dubin	902 Pointer Ridge Drive	Gaithersburg, MD	20878	\$84.00	2.7	0.46	\$0.00	\$31.11	\$26.58	0.9	1.05	\$28.00	\$28.00	0.7
33	N. Potomac	MD	20878	Caesar Ugaz	13912 Mustang Hill Lane	N. Potomac, MD	20878	\$356.40	5.99	7.4	\$0.00	\$59.50	\$26.62	0.33	0.74	\$19.80	\$19.80	0.5
34	Germanntown	MD	20874	Elaime Isaacson	12194 Flag Harbor Drive	Germanntown, MD	20874	\$453.60	8.84	8.38	\$0.00	\$52.50	\$26.65	0.31	0.61	\$16.20	\$16.20	0.5
35	Gaithersburg	MD	20878	Janie Trischel	18014 Haines Christie Lane	Gaithersburg, MD	20878	\$200.00	6.83	4.38	\$0.00	\$43.92	\$26.74	0.46	0.78	\$20.00	\$20.00	0.6

Sort the data by Jobs Done to Date. Select all customers with only 1-3 jobs done and cut and paste them into a new spreadsheet titled *CUSTOMERS WITHOUT PRICE INCREASE 2007.xls*. Make sure you copy over the headers as well. Save under the Contract Stuff Folder. (The purpose for this process is not to give price increases to customers who only used our service a few times.)

Now Sort the report by dollars per hour including travel time Ascending.



Create another new spreadsheet and save it as *CUSTOMERS WITH PRICE INCREASE 2007*.

Copy and Paste all of the customers' information that are below the dollars per hour goal (ex. \$40/hr) onto the spreadsheet titled *CUSTOMERS WITH PRICE INCREASE 2007* and all of the customers that met or exceeded the goal onto the spreadsheet titled *CUSTOMERS WITHOUT PRICE INCREASE 2007*.

Review both lists and see if any changes should be made (i.e. move from price increase to non price increase because their job was the first of the day and got a lot of travel time) or customers removed (i.e. they moved, etc.)

Next you will need to add the 2007 Prices to the Spreadsheets.

First - *CUSTOMERS WITH PRICE INCREASE 2007.xls*

Create 5 new columns at the end titled "Tentative 2007 Price", "Final 2007 Price", "With 10% Discount", "Installment Price (7 months)", and "biweekly price"

In the "2007 Price" column make a formula to calculate the raised price. We also do not want to increase prices indefinitely but to put a cap on how much a price can increase (i.e. 35%). You will need to account for the formula. The formula should be this:

IF(Previous year amount x 40)/ \$ per hour inc. travel time < Previous year amount x 1.35 THEN (Previous year amount x 40)/ \$ per hour inc. travel time, IF NOT THEN Previous year amount x 1.35

Ex: =IF(S2*40/P2<S2*1.4,S2*40/P2,S2*1.35)

We will also want to round up these prices so you will need to insert another column to the side named "Final 2008 Price"

In the 10% discount column create the formula: $2007 \text{ Price} \times .9$

In the Installment Price column create the formula: $(\text{price with 10\% discount} \times \text{number of weeks in season}) / 7$

In the “biweekly price” column create the formula $(2007 \text{ price} \times 1.3)$

Second - CUSTOMERS WITHOUT PRICE INCREASE 2007.xls

Create 4 new columns at the end titled “2008 Final Price”, “With 10% Discount”, “Installment Price (7 months)”, and “biweekly price”

You will need to create a formula to remove the discount from any contract prices for last year so create the following formula in the column:

=IF(Bill type="C", (previous year amount/0.9), previous year amount)

Ex: =IF(U2="C", (S2/0.9), S2)

In the 10% discount column create the formula: $2007 \text{ Price} \times .9$

In the Installment Price column create the formula: $(\text{price with 10\% discount} \times \text{number of weeks in season}) / 7$

In the “biweekly price” column create the formula $(2007 \text{ price} \times 1.3)$

Save the Spreadsheets and close them.

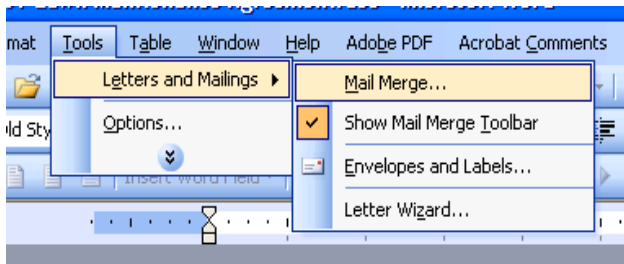
Next we will prepare the contracts.

Open the previous years contract and change any information needed (year, terms, weeks, etc.) Save it as *2007 Lawn Maintenance Agreement* (change to the current year).

Now save it as two new files: *Merge – Price Increase 2007 Lawn Maintenance Agreement* and *Merge – No Price Increase 2007 Lawn Maintenance Agreement*.

Next you will create the merge for each document.

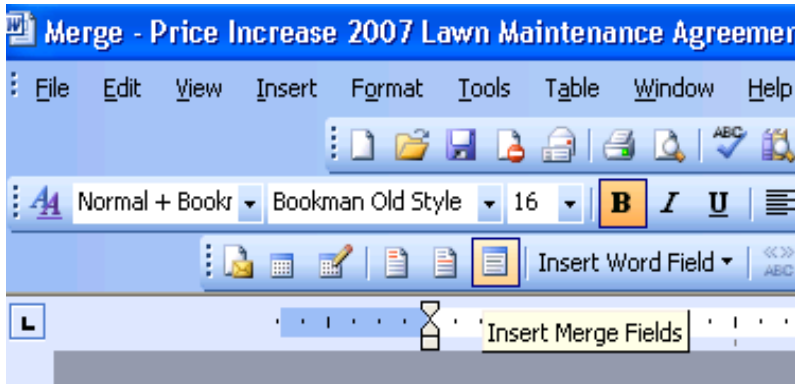
Open the *Merge – Price Increase 2007 Lawn Maintenance Agreement* and start a mail merge. Tools > Letters and Mailings > Mail Merge



Options to select:

- Letters
- Use the current document
- Use an existing list
- Choose browse and select *CUSTOMERS WITH PRICE INCREASE 2007.xls*
- Choose to bring the data via MS Excel Worksheets via DDE

Start inserting the fields where they belong.



Insert the Manager's signature on the signature line.

Complete the merge and Print.

Do the same process with *Merge – No Price Increase 2007 Lawn Maintenance Agreement* with the *CUSTOMERS WITH PRICE INCREASE 2007.xls* spreadsheet.

Create cover letters using the following files:

- *W:\CLIP Lawn Care\2007 Contract Stuff\2007 Agreement Cover increase.doc*
- *W:\CLIP Lawn Care\2007 Contract Stuff\2007 Agreement Cover no increase.doc*

Create a merge for these with the Excel Files above to insert the billing information.

Print the Documents on the three part carbonless copy paper. Follow the instructions in KIA for printing them. (keyword: contract)

Put the documents together.

Create labels in Word using a merge from the excel files above.

Mail!

Follow up with a call a week or two later!!!