

Field Projects

General Overview

Field Projects allows you to take a copy of the CLIP program out on a laptop and make projects/estimates out in the field. You can then export these projects to a diskette, CD, or to the network. In the office copy of CLIP you can then import these Projects.

Field Projects will allow to:

1. Create a new customer
2. Create or copy from an existing project
3. Select items from your existing inventory
4. Change any of the prices on an item
5. Print proposals and all other reports
6. Use the "Bill Now" feature

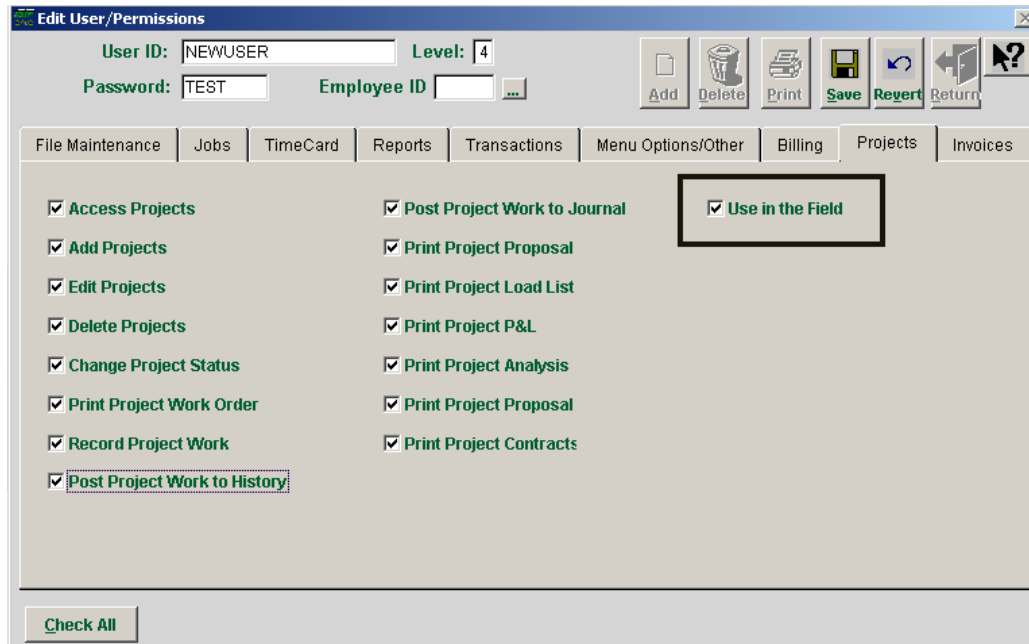
Field Projects is designed for a specific use, many of CLIP's features are disabled while you are in the Field Projects mode. There are a few limitations which are:

1. Updating existing customers data will not transfer
2. You can not add new inventory items
3. You can not change the master inventory list
4. You can not access jobs

How to initially setup the field version of Projects

1. Add a new user

You must have passwords turned on. Log into CLIP as the master user and “Add a new user”. Make the first character of each field user’s name unique because it will be used to identify invoices that are generated in the field; The first initial of the user’s name will precede the invoice number. In passwords go to the projects tab and check the box ‘Use in the Field’.



2. Install CLIP onto the portable computer

Use the CLIP install CD to install CLIP on the laptop. You can do a complete install.

3. Copy the office copy of CLIP onto the laptop.

The easiest way to do this is to have your laptop as part of a network, otherwise you can use a CD to transfer the office copy if you have a CD burner. Copy the CLIPv folder from the office computer and paste onto the laptop computer. Answer “Yes” to overwrite the installed copy of CLIP on the laptop.

4. On the laptop in the field log into CLIP using the field user name and password

5. Make a project

Create new customer(s), if you need to, or select an existing customer and create new project(s) as normal. If you are going to create customers in the field, you may want to assign a range of numbers to any of your users who create customers. Otherwise, if there is an existing customer number in the database when you import, the imported customer's number will be reassigned.

After you have finished the project/estimate, you can print any reports (proposal, load list, contract, etc.) as needed.

If you are performing the work, you can press the <Bill Now> button to generate an invoice for the project as it was bid. [The invoice# will be prefixed with the first letter of the user's login ID.](#) When you go back to the office and import the project into the office database, you will have to bill again as the invoices will not be imported in. When you generate the invoice in the office, enter the original invoice # in the P.O. number field. Subsequently, when payment is made, you can lookup the invoice by searching on the P.O. number field.

6. Export the project created in the field into the office copy

There are two different ways to export projects – thru File Maintenance <Projects> or via Projects->Field Version->Export menu selection. Normally we recommend the second option. Either way you choose, CLIP will create a folder and name it as follows:

#####XXXXXXXXXX99999999 where # is the customer number, X is the first 10 characters of the customer's name, and 9 is the project id.

Export Via File Maintenance <Projects>

If the user is logged in as a field user, the <Export> button will appear at the top of the Project screen when the "Pick Project" or "Detail" page is active. Highlight the project that you want to export. Press the <Export> button. CLIP will prompt you to select a directory to export to project info to. Info will be stored in [a directory](#) that is named by using the customer's number, name, and project ID.

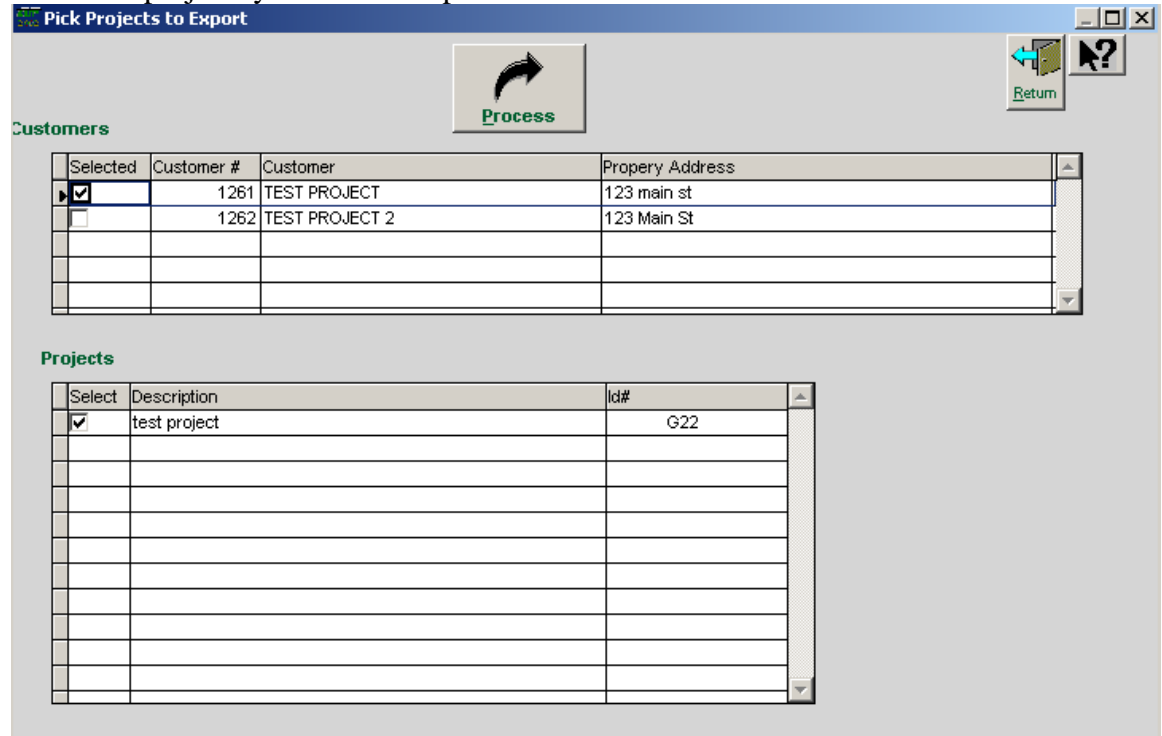
Export Via Projects->Field Version->Export menu selection

If the user is logged in as a field user, the <Export> menu selection will be enabled.



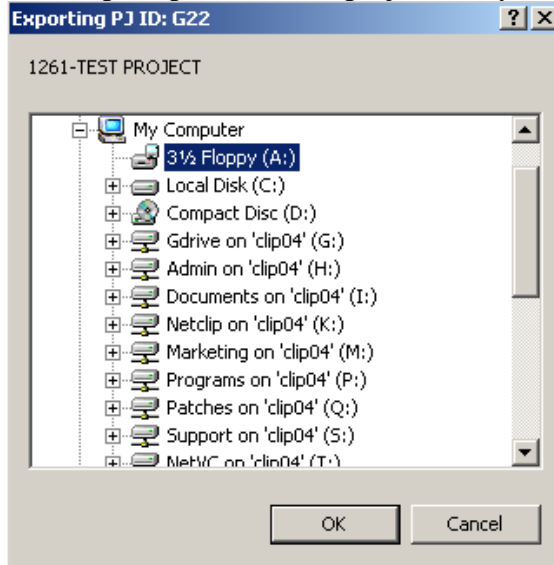
Select the customers that have projects you want to export.

Select the projects you want to export



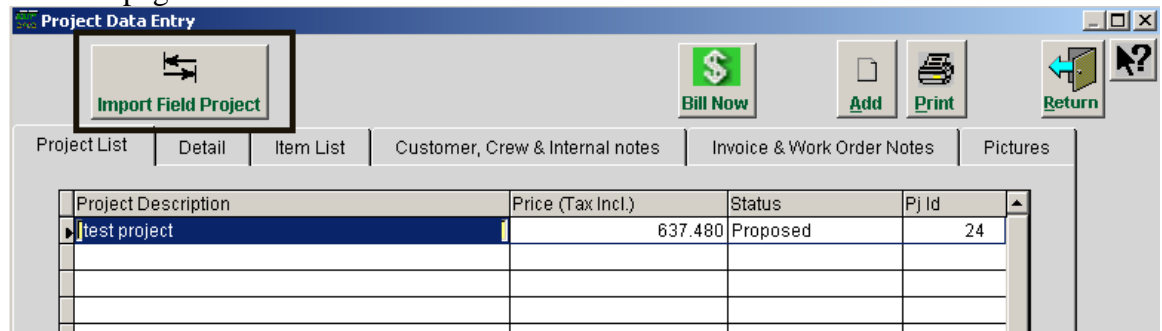
Select Process

Select where you want the export file to go to. In the example we are sending it to a diskette, but you could put it on a CD, Zip or directly onto the network. You will be prompted for each project that you are exporting



7. Import Project into the office copy

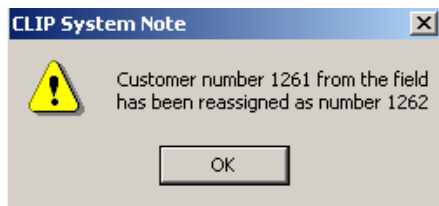
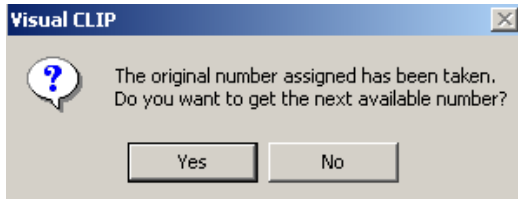
Via File Maintenance <Projects>. This might be used for existing customers that are already in CLIP. If the user is NOT logged in as a field user, the <Import> button will appear at the top of the Project screen when the “Pick Project” or “Detail” page is active.



You will be prompted to locate and select a folder to import from. If the customer number and ID don't match, the import will terminate.

Select Process

If the project was for a new customer and customer number has already been used by the office copy of CLIP you will be prompted to allow CLIP to assign a new one. Select “Yes”. Otherwise the projects will be imported automatically.



You can now go to the customers and see all the projects/data that was imported in.

Occasionally you may want to recopy your office copy back onto the laptop so you will have the most update to date information in the field.