

# CLIP ERouter Manual for Palm Pilots





## System overview

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The CLIP ERouter permits you to load route sheet data from CLIP into a Palm Pilot unit. This will eliminate the need of sending out paper route sheets with the crews. The Palm is connected to your PC through a USB cable that attaches to your computer. At the beginning of each day you upload the crew work to the Palm. At the end of the day crews return the device to the office, and the data loads easily from the Palm to CLIP. This will also work for multiple days, you could upload the whole week to the Palm and then download it at the end of the week.

**The Palm must have the 4.0 or newer OS (Operating System). Any new Palm you buy will have the correct OS on it, only older units may not work.**

After CLIP processes the downloaded file the following information is recorded in the record work screen:

- Job marked as done or not

- Start and stop times

- The number of persons in the crew

- The four digit employee ID if using with the Pro employee module

Job costing becomes seamless; the office no longer has to enter times manually.

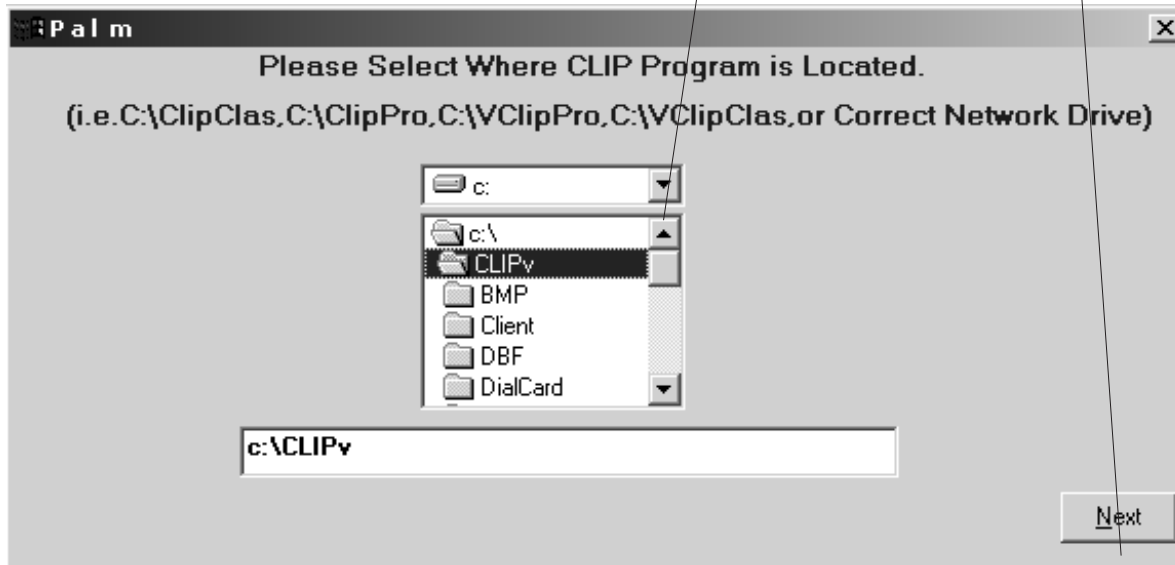
## How it works technically

When you push the Upload button from within the Print Route Sheet screen a text file is created. This file is called Crewdata.txd. Syncing with the Palm transfers the file to the Palm. When you select "Get Work" on the Palm, the program goes and gets the file and pulls it into the program. The opposite happens when you "End the Day". The ERouter program makes a file called crewdata(plus the date).cfd and transfers it to a folder which is then transferred back into CLIP.

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## Installing the ERouter software

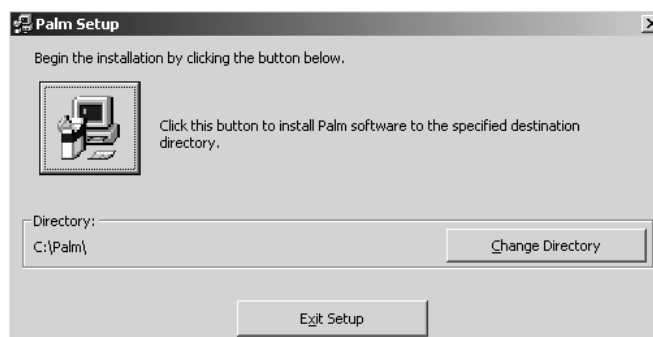
1. Install the Palm Pilot according to the directions supplied with the Palm.
2. Install the CD-ROM that came from Sensible Software. It should automatically start when you put in the CD-ROM, if not go to Start-Run and type x:setup ( x is the letter for your CD-ROM).
3. Locate where your CLIP program is installed. You will need to navigate to the C drive first (if you have CLIP on a network go to the correct drive where CLIP is installed). Use the pull down to see the drives then find the CLIPv folder, select Next.



**NOTE: If you move CLIP you will have to reinstall the ERouter software and select the new drive and folder as shown above.**

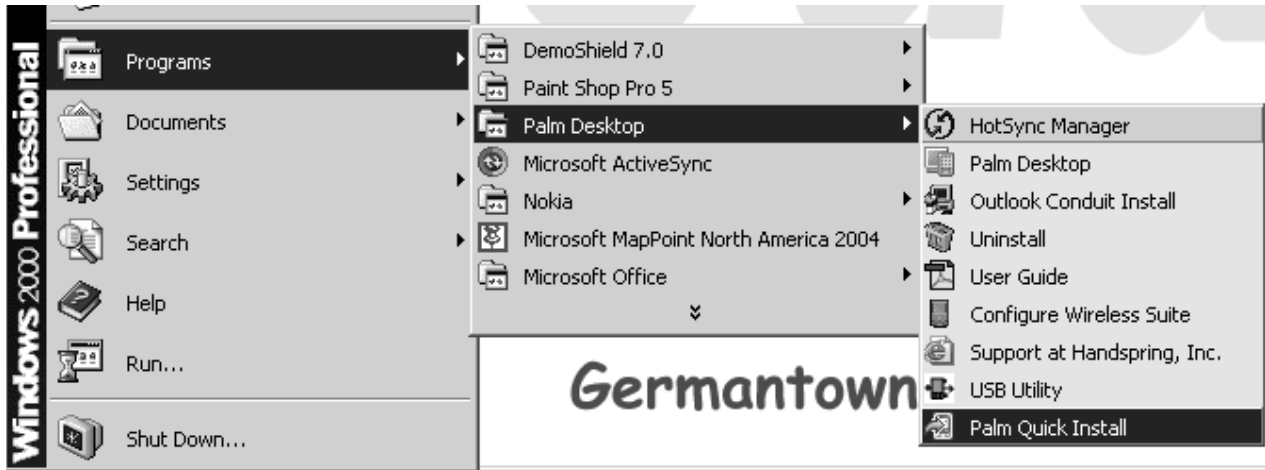
**4. Accept all the choices that come up. Normally your Palm software is installed to C:\Program Files\PalmOne. If you changed this when you installed the Palm then you will need to use the "Change Directory" button to locate where it is installed.**

**NOTE: If you have a Handspring you must change the location to C:\Program Files\Handspring. If you do not do this the Program will install but CLIP will not sync with the unit.**

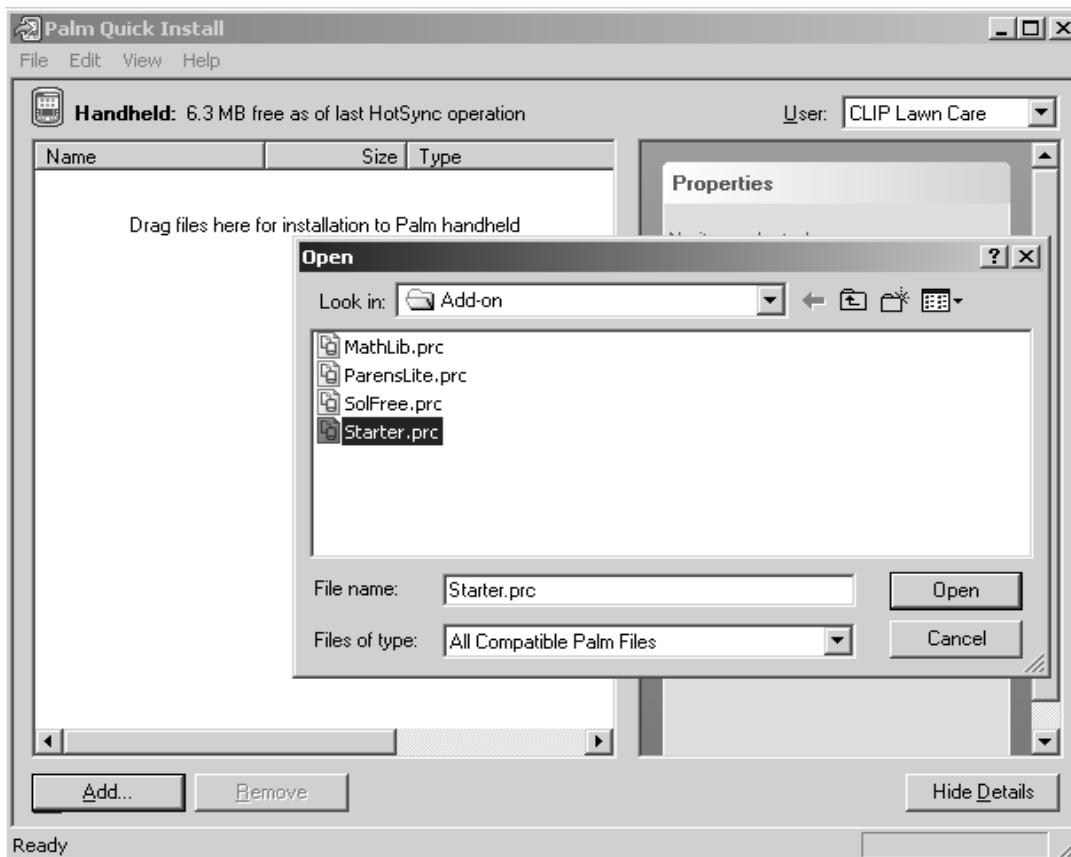


## If you sent the Palm in for programming by Sensible Software then skip to step 10

5. Open the Palm Installer by going to Start-Programs-Palm Desktop and click on Palm Quick Install.

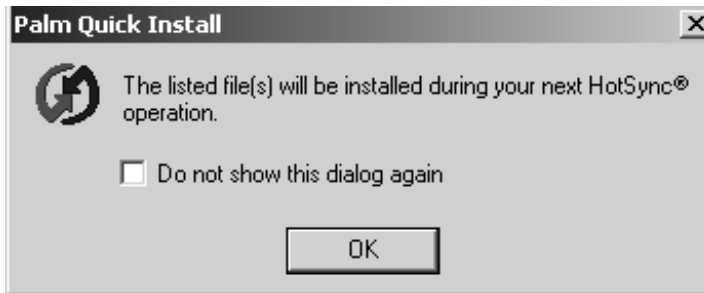


6. Click on Add and locate the file called Starter.prc.

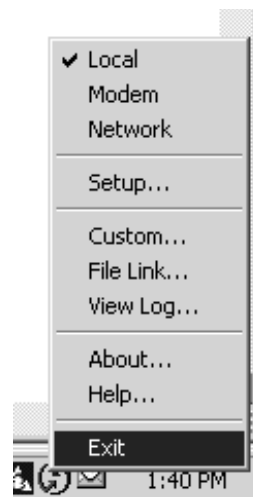


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7. Select Open
8. Select File-Exit



9. Select OK
10. Shut down the Active Sync by locating the icon on the bottom right of your screen on the task bar. It is Red and Blue in color and a picture of a circle. Position your mouse over the icon and right click. Select Exit



11. Select Yes to Exit ( if screen appears)
12. Restart the Active Sync by going to Start-Programs-Palm Desktop then select HotSync Manager. This will restart the HotSync.

**FAILURE TO DO STEPS 10-12 WILL PREVENT THE PALM FROM SYNCING WITH CLIP. THE SOFTWARE WILL BE INSTALLED AND THE PALM WILL STILL SYNC BUT THE ERROUTER WILL NOT WORK.**

13. Plug the Palm in into the cable-
14. Push the sync button on the Palm - *Wait until the Palm is done syncing*
15. Select the Home key icon located on the Palm. This is the one with the picture of a house that is permanently printed on the Palm

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16. You will see a new icon that says ERouter



17. Select the ERouter icon

18. Select Continue

19. Select OK to the Welcome to ERouter message

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## Using the ERouter software

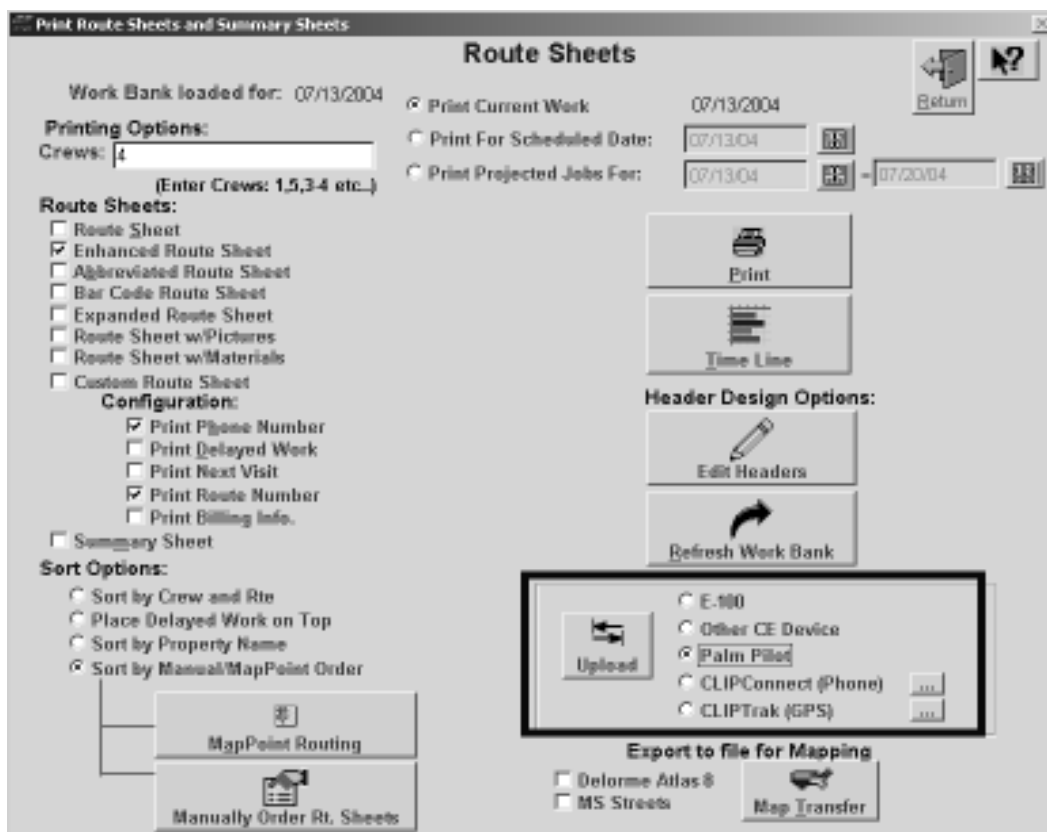
Open Clip

Go to Daily Routines and Print Route Sheets.

Now, select the crew(s) for which you wish to upload a route sheet for. Note that all jobs for the given crew(s) will go to one Palm. Normally, you should Upload data for one crew at a time when using multiple Palms.

Check off the Palm Pilot button on the right then push the Upload button

(Pro screen shown- Classic is similar with less options)



Select OK to the File produced message

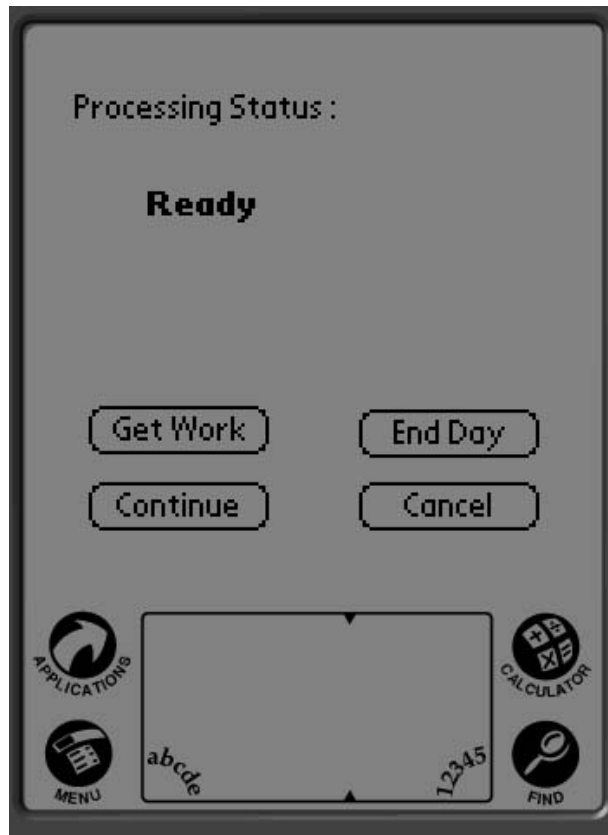
Press the Sync button on the Palm. Wait for sync to finish

On the Palm select the ERouter Icon

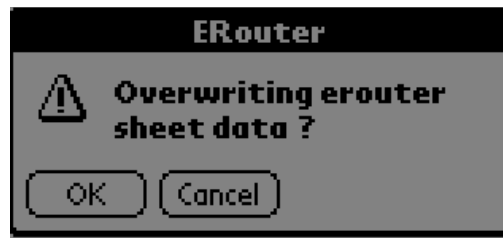
Select "Continue"

Select "Get Work"

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Select "OK" to overwrite the data. This will overwrite the data from the previous upload.



Enter the Supervisor's Initials by using the Palm alpha keyboard ( 4 characters)

**NOTE:** If you are using Pro and are going to record individual employees times you must use the 4 digit employee code that you assigned in File Maintenance. If you are using Classic or not tracking employees then you must still enter a 4 digit employee code that CLIP will use for the Foreman

Enter the number of crew members by using the Palm num keyboard



Based on the number of crew members entered you will be prompted to enter the employee's ID number.

**NOTE:** This feature is for use with the Pro Employee Module. If you are not planning to use this function, you do not have to fill out the employee id's, just select the "OK" button. If you have the "Record Employee Times" checked off in the Record Work screen (Pro only) then you must put the correct id in for each employee on that crew. When using the employee module the employee ID is 4 digits long otherwise only a 3 digit ID is used to track the Foreman only.

Select OK

You will now see a list of all the customers for that day. You can use the scroll bar to see them all. These are listed in the Routing Sequence order just like a normal route sheet.

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Find the customer you are starting work for and select "View Jobs". You will see all the jobs scheduled for that customer.

There two ways to mark a job as done.

1. Tap the **Mark job as done**, The job will then show "Y" as being finished. The negative to this method is that the job is not being timed and therefore not utilizing **CLIP's** job costing function. This method may be used mostly by chemical applicators.



2. Tap the **Start Job** button. Enter the mileage if desired . Tap **Start the Job** The job is now in progress. The notes will appear in the center of the screen. Note the man-hour rating and the time shows when the job was started . At this point the Palm can be shut off or it will automatically shut off according to your settings. When the job is completed you have two choices.

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A. If the property only has one job and you are moving onto the next property tap **End Job**

B. If more then one job is being done or multiple properties are next to each other then you will want to tap **Add Another**. This starts what is called "group mode". To get the most accurate job costing you would technically have to stop what your doing in the middle of a multi job property. Lets say you had mowing as one job and trimming as another. As soon as you finished mowing you would have to stop the job and then start the next job in the Palm. The same would apply for properties next to each other. This is not practical. Grouping mode handles this by letting you start the first job, do all the jobs, then come back and mark all the jobs in group mode. This is done by tapping **Add Another** then find the next job, **Start Job**, immediately **Add Another**. You would keep adding all jobs that need to be grouped. On the last job of the group you would tap **End Job**. Clip will then take the total time spent and divide it among all the jobs. The calculation is based on the man-hour rating you have entered in the jobs detail screen. It is important to have these filled in and correct. Clip allows you to adjust these "distributed" times in the record work screen to make corrections.

After completing a job, you may start another for the same customer or you

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may return to the Properties screen and select another property.

If a mistake was made on recording the job as done you can choose to unmark the job as done. This erases all the information for that job. Note: This will not work if the job was recorded in the grouping mode.

Use the "Return" button to get back to the Properties screen to see which property is to be done next. Follow the procedures described above to complete the day. If any job or property is not completed you do not need to do anything in the way of marking it.

**Note:** The supervisor's Initials and Number of Crew Members can be changed while in between jobs. Select the ERouter tab at the top of the screen. Then select File-Utilities. You can now make the needed changes

At the end of the day select the "End Day" button from the Properties screen.

Select the "End Day" button from the Processing Status screen

Select OK to End the day. This will overwrite yesterdays file.

After Ending the Day the Palm goes back to the main screen. Leave it there.

**Do not "Get the Work" until you have finished downloading and processing the files for the day**

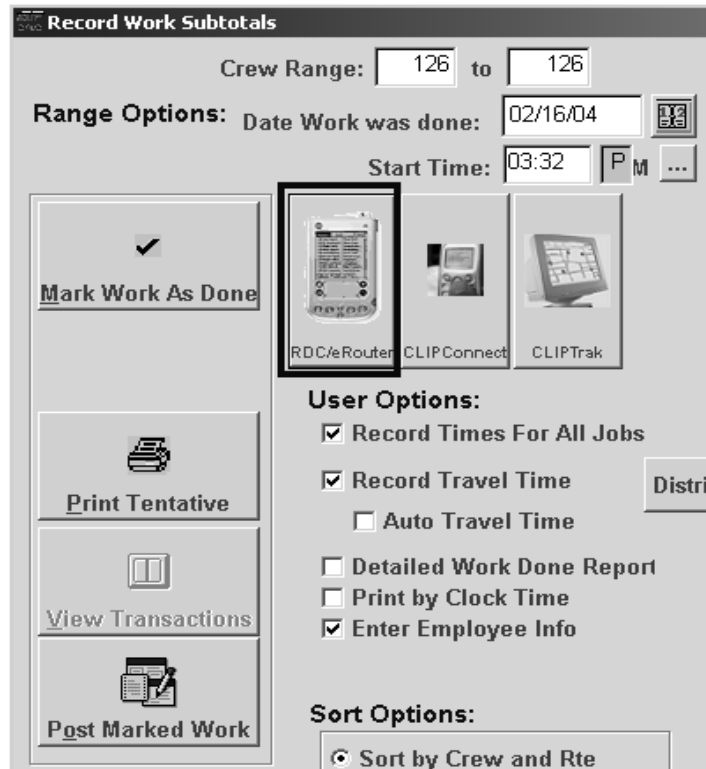
Plug the Palm into cable.

In CLIP go to Record Work. (Normally you should have the "Record Times For All Jobs" checked off) ( If using the Employee tracking make sure the "Enter Employee Info is also checked off) Note: You must have "Record Times for All Jobs" checked off if you are going to have "Enter Employee Info" checked off.

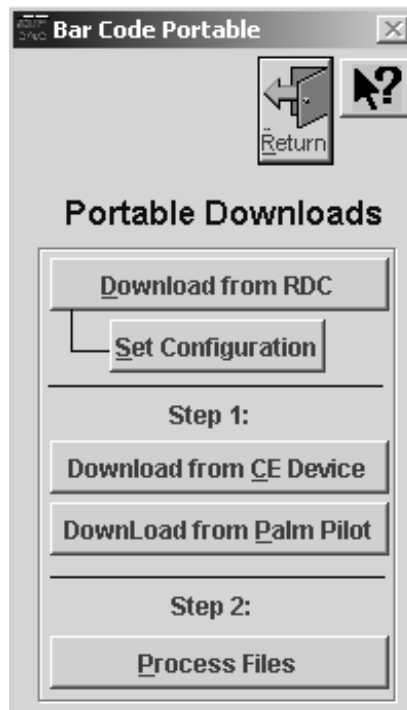
Click on the picture "RDC/eRouter"

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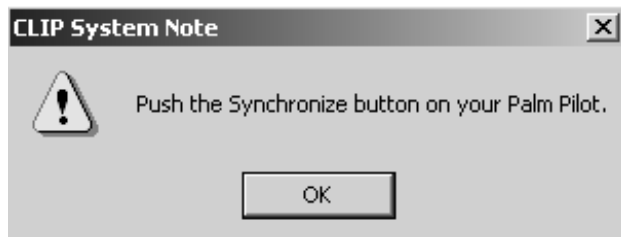
Select "Download from Palm Pilot"



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Push the sync button on the Palm.

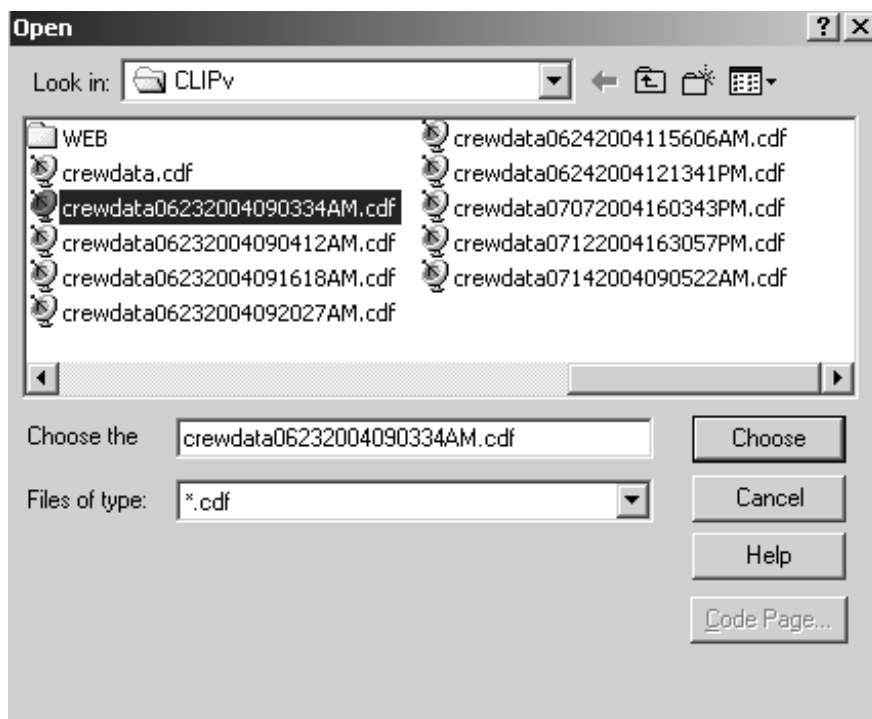
Select OK to the Clip message



You can sync all the Palms one after another if you have more then one or you can process one at a time

Select Process Files

From the list on the left choose the file that says crewdata+date+time.cdf(example: crewdata06232004093304AM.cdf). If you have multiple Palms a separate file is created for each time you sync. Choose the one you want to process. After the process is complete it will delete the file.



Select the Choose button

You can now either print or preview the information that was recorded.

**NOTE:** If you have the "Record Employee Times" checked off CLIP will compare the employee ID that was entered in the Palm to what employee ID's are setup in CLIP. If it finds an ID that is not in CLIP you will get a warning message for

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each time a mistake is found. You will need to go into the record work and manually correct these mistakes after the import process is finished.

You can manually go into any job through the record work screen to preview and make adjustments as needed.

Post work as normal.