

# Contents

Vander Kooi and Assoc. System of "Multiple Overhead Recovery" ..... 3

Tutorial for making an estimate in Projects ..... 4

Setting up the basics ..... 37

    A: Set Up Vendors ..... 37

    B: Set up user defined descriptions ..... 38

    C: SET UP INVENTORY ..... 40

        Assigning Part Numbers ..... 40

Setting Up A Project ..... 42

    Reports ..... 53

Daily Routines ..... 57

    1.Set up the project work orders for your crews. .... 57

    2. After selecting you will can send it to the printer or to the screen ..... 60

    3. Send your crew out with the work order ..... 61

    4. Set up project bank: ..... 62

Overview on the Record Work Screen ..... 62

    5. Add projects into the Project Bank ..... 64

    6. Recording The Work ..... 65

    7. Post the projects to history ..... 72

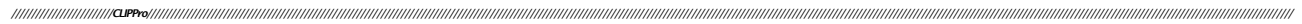
    8. During the process check and evaluate the progress ..... 73

    9. Posting History to Journal ..... 73

    10. Print Bills ..... 75

Importing inventory from Excel ..... 76

Working with DIG (Design Imaging Group) ..... 79



**Projects**

Projects is a powerful, accurate tool that helps you to know how much to bid on a proposal for construction work. You will have a list of all the materials, labor and assemblies that you use in your company. You will set up your customers with the name and addresses of all the customers that you might give estimates and proposals to. Once this initial set up is done, you will be able to crank out proposals very easily and accurately, knowing that you will make money on any project you bid on. These proposals are then printed out on work orders for your crews. When they bring back the work orders you can record these items as being done and track your costs, overhead and profit. You can compare proposed amounts to actual amount used.

**Vander Kooi and Assoc. System of "Multiple Overhead Recovery"**

CLIP Software worked closely with Vander Kooi and Assoc. (VKA) to develop Projects to easily accommodate their system of bidding and estimating. VKA offers classes, workshops and personal consulting to companies that want to become more profitable. By tracking all of your costs and classifying them into the various categories, VKA helps you come up with your Multiple Overhead Recovery System (MORS) numbers. The MORS will tell you exactly how much overhead you need to recover on the four areas of any estimate, i.e.: Materials, Labor, Equipment and Subcontractors. CLIP software has also developed a system to figure these numbers out. This system, MORS, is only available through VKA or CLIP software and includes consultation from VKA to make sure that the numbers will be accurate in your situation.

A typical example of MORS numbers would be 10% on Materials, 70% on Labor, 15% on Equipment and 5% on Subcontracts. This means that if I have a total project that includes all four of these items, I would add 10% to my materials cost, 70% to my labor cost, 15% to my equipment cost and 5% to my subcontractors cost to help defray overhead. On top of that I would add 15% for profit. The breakdown would look something like this:

Landscape Job

Materials Cost	\$ 400.00	Add 10%	Equals \$ 440.00
Labor Cost	\$ 432.00	Add 70%	Equals \$ 734.00
Equipment	\$ 30.00	Add 15%	Equals \$ 34.50
Sub-Cont.	\$ 320.00	Add 5%	Equals \$ 336.00
Total Costs			.....\$1,544.90
Add 15% Profit			.....\$1,776.64 Customer's price

As long as your Overhead Recovery numbers are correct, you will guarantee a profit at the end of the year while remaining as competitive as you can or want. This system is much better than the "shoot from the hip" system that a lot of people use such as tripling your materials cost or doubling your subcontractors costs. These other methods work, if they work at all, by chance. If you have a job with a high cost on materials, your bid will be way out of line. On the other hand if you have a job with low materials cost, your bid will be low and you will lose money on that job. You have to remember that you are a service company and what you are really selling is labor and knowhow. Labor is where you will make or break the bank.

Because labor is so important to us, we also need to track "general conditions" (or hidden items) that the customer will not see but are a real cost to us. A good example of a general condition is travel and set up time. If the property where the work will be performed on is a long distance away (30-45minutes) and we will be sending a crew of three employees and it takes two days to

complete the job, we need to add 45 minutes times 3 men times 4 trips (two round trips) or 9 man hours. Since our average cost per man hour on that crew is \$12.00 that means we will need an additional (\$108.00 plus 70% in labor costs) \$183.60. We would not want to show this to the customer on the bid, but it is a very real cost and therefore must be paid by the customer. The way this is handled is to distribute the extra travel time throughout the bid so that the price reflects the additional costs of travel but it is not broken out as an individual item for the customer to see.

Now our new bid is \$1,729.65. (old cost (\$1,544.90) plus the travel time cost \$183.60 plus 15% for profit.

As you use Projects, you will see that we accommodate this system very well. Projects is powerful enough to use other systems of estimating and bidding as well. We, at CLIP Software believe that the VKA system is one of the best available and will help guarantee your profits from year to year.

### **Tutorial for Setting up Projects**

---

Before you can begin to make up estimates and proposals for your customers in Projects, you need to set up your vendors, your stock types, Please reference later in the manual for detailed instructions on how to set all these lists up. For the purpose of this tutorial we will only use the options that come shipped with CLIP.

### **Tutorial for making an estimate in Projects**

---

Lets make up an estimate in Projects just to show you how fast, accurate and easy it is.

To use this example, we will create a proposal for a customer that wants us to install a flower bed and plant a tree.

#### **Enter the items we will use into the Inventory**

**Note:** To use any items to build a project, they first have to exist in inventory.

We need to create all the parts that we will need.

When we analyze what parts will be needed for this proposal we can actually see that there are a good number of parts needed:

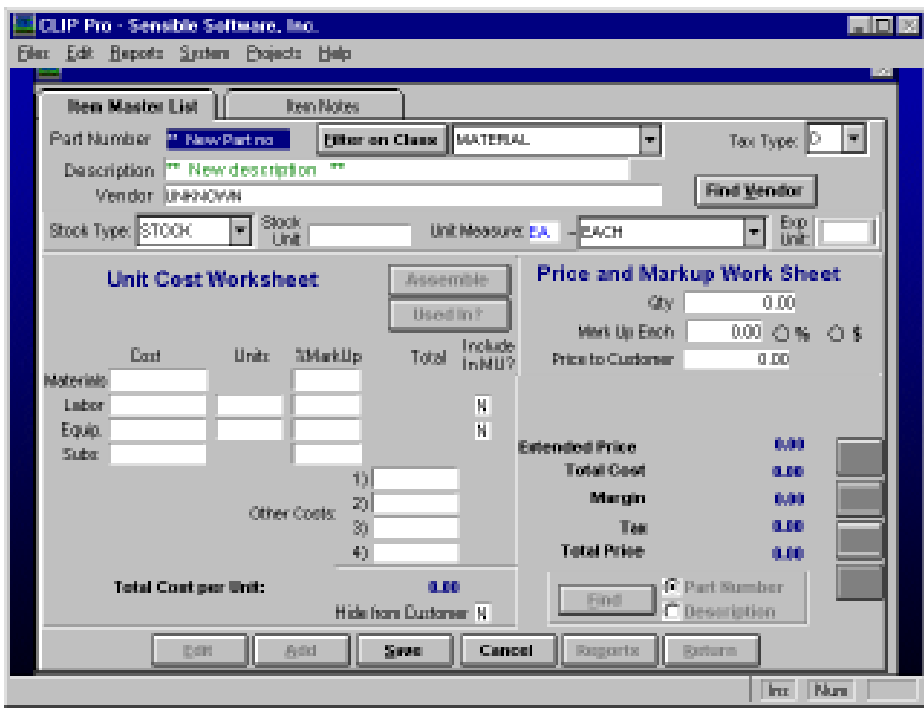
1. Flowers
2. Mulch
3. Peat moss
4. A tree
5. Three stakes
6. Some string
7. Labor
8. Travel time

Some of these items can be viewed as part of an assembly. For example, we could create an assembly called "plant tree" that included the string, the stakes, the labor, and the peat moss. We will do that, but first we need to add each of these parts to our inventory.

Open the Inventory - Inventory Data Entry screen to begin.



The first item is blank, since we initially do not have anything in our inventory database.



**Entering the Flower**  
**Enter the Part Number.**

It is important that you have a method for assigning part numbers. It will be much easier later on to be able to identify a part easily by its part number. For Example, if we were to enter the flowers here, we could put them in as "AN" for annuals, then the name "ZINNIA" and then the size "4". Now we would know easily that a 4 inch Zinnia is ANZINIA4.

## Projects/Bidding/Estimating

Set the class type as "PLANT", Set the tax type to "D" (No sales tax). Set the description to "Zinnias 4 Inch Potted". If you have set up your vendors in CLIP, you can choose the vendor for this part, if not, just leave it blank.

Stock type would be "STOCK" meaning that this item is a stock item that needs to come from inventory. A "TIME" part is one that is not inventoried but is spent on the job.

The stock unit answers the question; "How are they packaged?" You could enter a "24pc Flat" or "5 gallon".

The unit measure is "How is it counted?". This could be EA or LBS or some other measurement.

The Exp Unit is a special field for exporting the inventory to PlanScape and other Landscape design programs. Ignore it for now.

The screenshot shows the CLIP Pro software interface. The main window is titled "CLIP Pro - Sensible Software, Inc." and has a menu bar with "Files", "Edit", "Reports", "System", "Projects", and "Help". The "Item Master List" tab is active, showing the following fields: Part Number (ANZINIA4), Description (Zinnias - 4 Inch potted), Vendor (UNKNOWN), Stock Type (STOCK), Stock Unit (24pc Flat), Unit Measure (EA - EACH), and Tax Type (D). There are buttons for "Filter on Class", "Find Vendor", "Assemble", and "Used In?". Below these fields is the "Unit Cost Worksheet" section, which includes a table for entering costs:

Materials	Cost	Units	%Markup	Total	Include In MU?
Labor					N
Equip.					N
Subs					

Other Costs: 1) 2) 3) 4)

Total Cost per Unit: 0.00

Hide from Customer: N

The "Price and Markup Work Sheet" section shows: Qty (0.00), Mark Up Each (0.00), Price to Customer (0.00), Extended Price (0.00), Total Cost (0.00), Margin (0.00), Tax (0.00), and Total Price (0.00). There are buttons for "Find" and "Return".

### Entering the Costs

We need to enter all the costs associated with this part.

**Materials Cost** - Enter the direct cost of purchasing this product. If you pay your sales tax up front and do not charge it to your customer, enter the cost including the sales tax because it is a real cost to you.

**Markup for materials** - This mark up pays for part of the overhead needed to perform work. If you are using the Vander Kooi method, you will have a percentage that you will use for all materials. This will normally be 10%. CLIP will figure out the materials total line item.

**Labor cost** - Labor can be set up as a separate item (part number) or it can be included within a part. We recommend that you keep the labor as a separate

////////////////////////////////////CLIPPro////////////////////////////////////

item/part and include it as an assembly part or enter it into your project as a separate item. For this example, we will not enter labor included on the part.

**Equipment cost** - Equipment and labor are very similar. We will not enter equipment costs for this item.

**Sub-Contractor's costs** - There are no subcontractors for this item so we will not enter any.

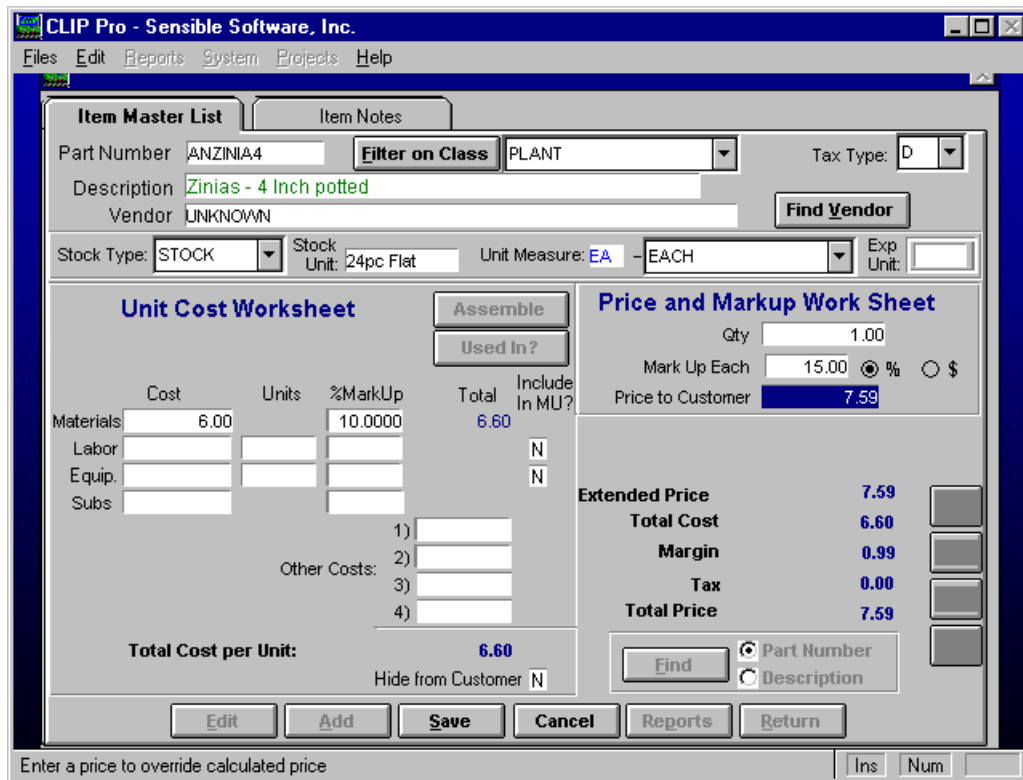
**Other costs** - There are no other costs so we are finished with these costs.

**Hide from Customer** - This will not be a "general conditions" part, so we will not be hiding it from the customer.

**Price and Markup**

First, we will enter the normal quantity ( usually 1 )that will be used for this item. This quantity will be changed when we actually make up a project, but at least it will default to this value until we change it.

**Mark up each** - For markup, we are shooting for 15% markup on all items, so we will enter a "15" here and then choose the "%" radio button.



This changes our price to the customer to \$7.59. Notice that we have a \$0.99 margin on each flower. This is 15% of the cost.

Save the changes and get ready to enter the tree.



### Entering the tree

#### Adding a new part

To add a new part, press the "Add" button.

Press enter on your keyboard to select the Zinnias as our pattern. This will copy all of the information from Zinnias down to the new part helping us with some of the data entry.

#### Enter the Part Number.

A part number for labor could be "TRAWEEPW" for Tree - Assembly - Weeping Willow Tree.

Set the class type as "PLANT", Set the tax type to "D" (No sales tax).

Set the description to "Weeping Willow Tree - 5 gallon Assembly".

Stock type will be "ASSEMBLY".

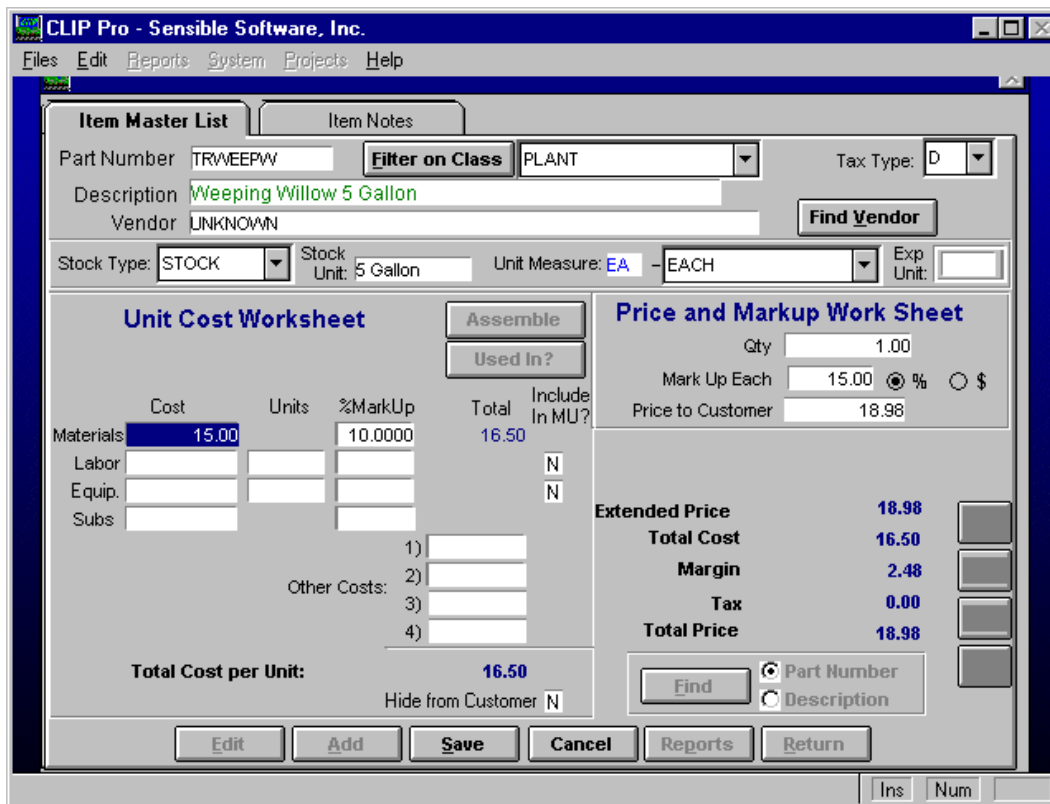
Unit Type will be "5 Gallon"

The unit measure (How is it counted?) will be "Each".

#### Entering the Costs

We will enter the materials cost for the Tree.

Your screen should look something like this:



Enter the normal quantity (1) and the percent mark up (15%).  
Save your changes and get ready to enter the mulch.

**Entering the mulch**

**Adding a new part**

To add a new part, press the "Add" button.

You will now see a list with the previous part number in it. CLIP uses patterns extensively throughout the program. These patterns help you enter information quickly and easily. Press enter on your keyboard to select the Zinnias as our pattern. This will copy all of the information from Zinnias down to the new part helping us with some of the data entry.

**Enter the Part Number.**

A part number for mulch could be "MUSHHW" for Mulch-Shredded-Hardwood Set the class type as "MATERIAL", Set the tax type to "D" (No sales tax). Set the description to "Shredded Hard Wood Mulch". If you have set up your vendors in CLIP, you can choose the vendor for this part, if not, just leave it blank. Stock type will be "STOCK" meaning that this item is a stock item that needs to come from inventory.

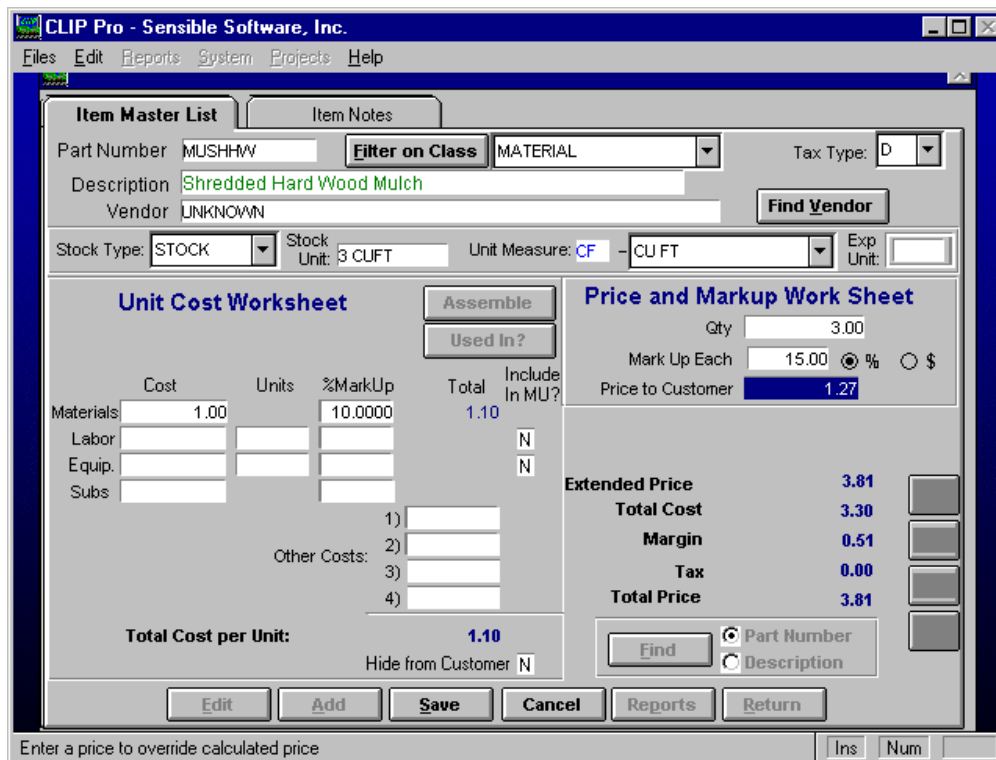
The stock unit (How part is packaged?) will be "3 CUFT" for 3 Cubic foot bags or "LOOSE" if you purchase it in bulk.

The unit measure (How is it counted?) will be "CU FT" for cubic foot.

**Entering the Costs**

We will enter the materials cost for Mulch.

Your screen should look something like this:



Save your changes and prepare to enter the peat moss.



### Entering the peat moss

#### Adding a new part

To add a new part, press the "Add" button.

Press the down arrows on your keyboard to select the mulch. The mulch and the peat moss are very similar. Press enter on your keyboard to select the mulch as our pattern. This will copy all of the information from "mulch" down to the new part helping us with some of the data entry.

#### Enter the Part Number.

A part number for labor could be "MUPEETMO" for Mulch - Peat Moss.

Set the class type as "MATERIAL", Set the tax type to "D" (No sales tax).

Set the description to "Peat Moss".

Stock type will be "STOCK".

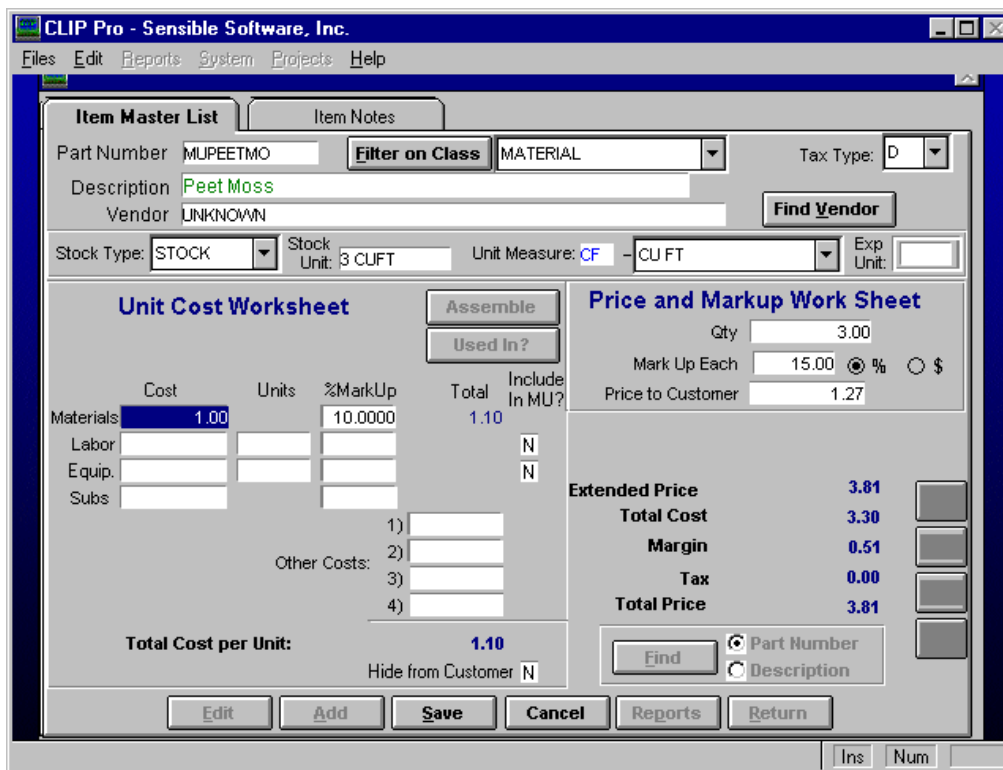
Unit Type would be "Cubic Ft"

The unit measure (How is it counted?) will be "CU FT".

#### Entering the Costs

We will enter the materials cost for the Peat Moss.

Your screen should look something like this:



Enter the normal quantity (1) and the percent mark up (15%).

Save your changes and get ready to enter the stake.

**Entering the stake**

**Adding a new part**

To add a new part, press the "Add" button.

Press enter on your keyboard to select the Zinnias as our pattern. This will copy all of the information from Zinnias down to the new part helping us with some of the data entry.

**Enter the Part Number.**

A part number for labor could be "MTSTAKE" for Materials - Stake.

Set the class type as "MATERIAL", Set the tax type to "D" (No sales tax).

Set the description to "2.5' Stake".

Stock type will be "STOCK".

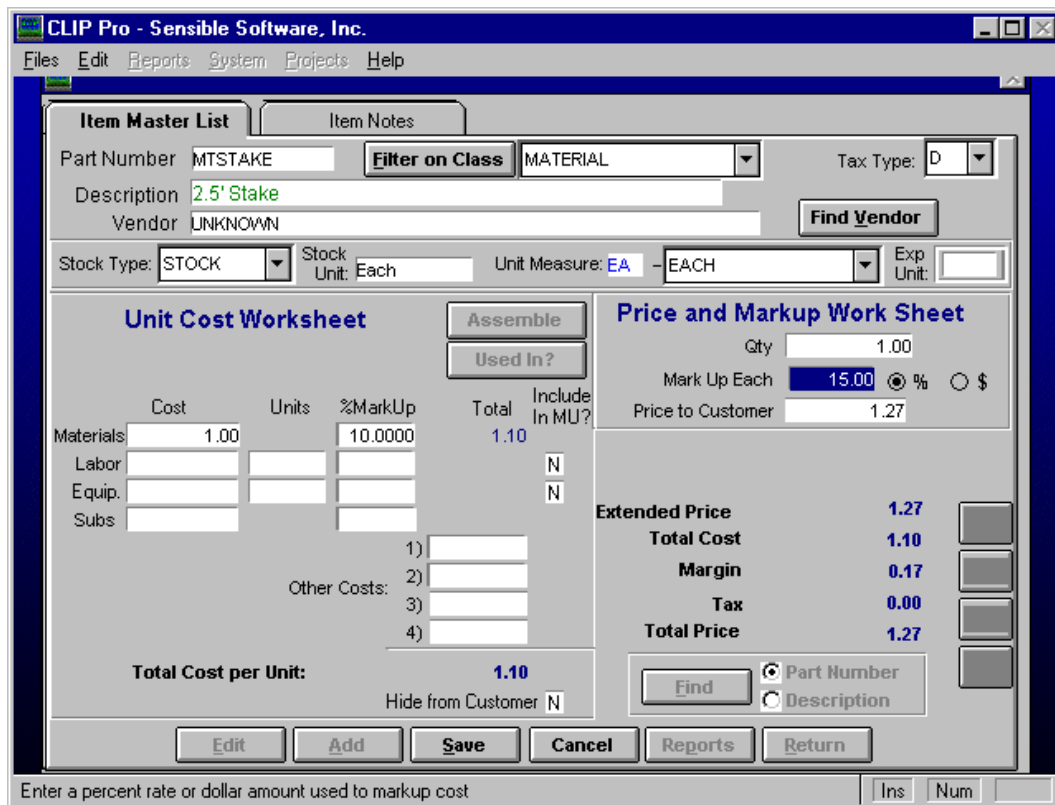
Unit type would be "EACH"

The unit measure (How is it counted?) will be "Each".

**Entering the Costs**

We will enter the materials cost for the Stake.

Your screen should look something like this:



Enter the normal quantity (1) and the percent mark up (15%).  
Save your changes and get ready to enter the string.



**Entering the string**  
**Adding a new part**

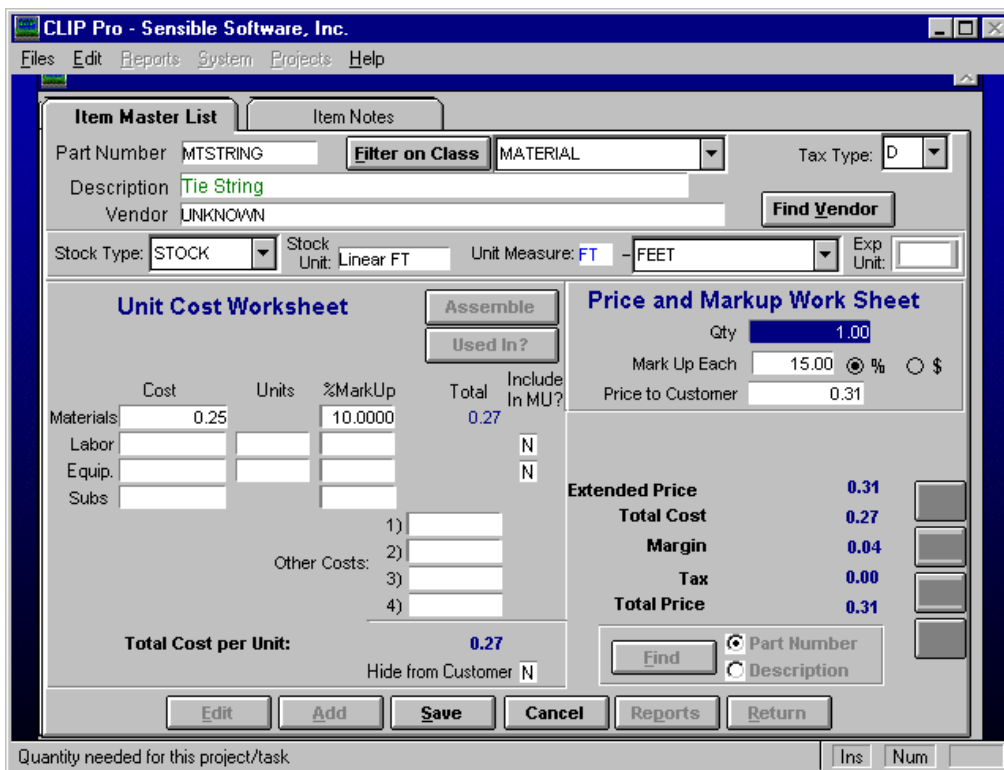
To add a new part, press the "Add" button.  
Press the down arrows on your keyboard to select the stake. The stake and the string are very similar. Press enter on your keyboard to select the stake as our pattern. This will copy all of the information from "stake" down to the new part helping us with some of the data entry.

**Enter the Part Number.**

A part number for labor could be "MTSTRING" for Materials - String.  
Set the class type as "MATERIAL", Set the tax type to "D" (No sales tax).  
Set the description to "Tie String".  
Stock type will be "STOCK".  
Unit Type would be "Linear Ft"  
The unit measure (How is it counted?) will be "FT".

**Entering the Costs**

We will enter the materials cost for the String.  
Your screen should look something like this:



Enter the normal quantity (1) and the percent mark up (15%).  
Save your changes and get ready to enter the labor.

**Entering the labor**

**Adding a new part**

To add a new part, press the "Add" button.

Press enter on your keyboard to select the Zinnias as our pattern. This will copy all of the information from Zinnias down to the new part helping us with some of the data entry.

**Enter the Part Number.**

A part number for labor could be "LAB01" for Labor type 1. The reason for using various labor part numbers is that you might have different costs for different types of labor. You could even create a labor part for each employee and get even more accurate in your costing.

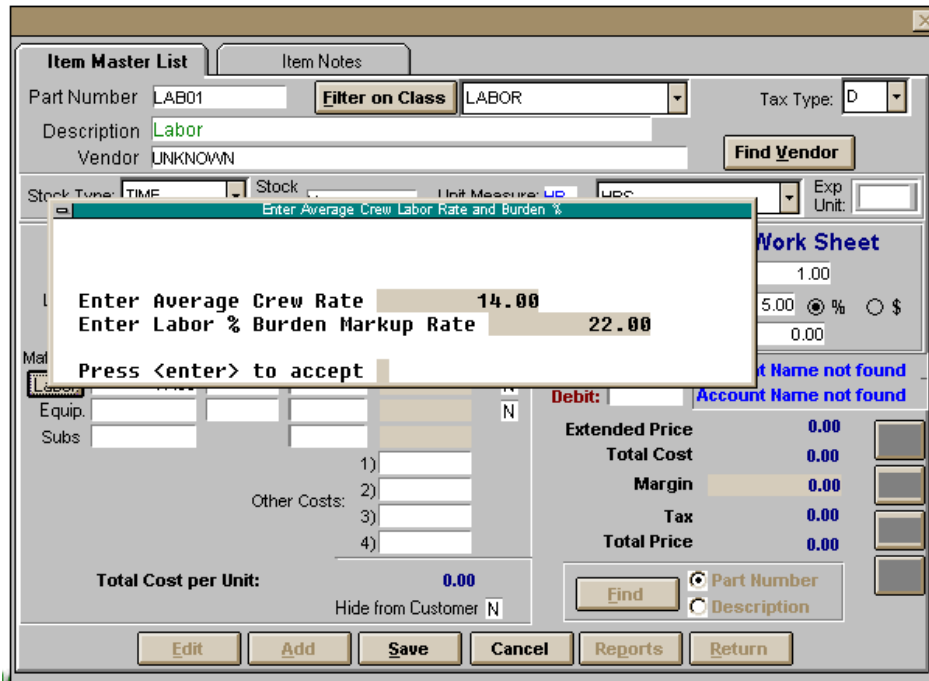
Set the class type as "TIME". Set the tax type to "D" (No sales tax). Set the description to "Labor". There are no vendors for labor unless you want to set up each employee in the data base and use them as a vendor for their own rate.

Stock type will be "TIME" meaning that this item does not come from inventory. The unit measure (How is it counted?) will be "HRS" or hours.

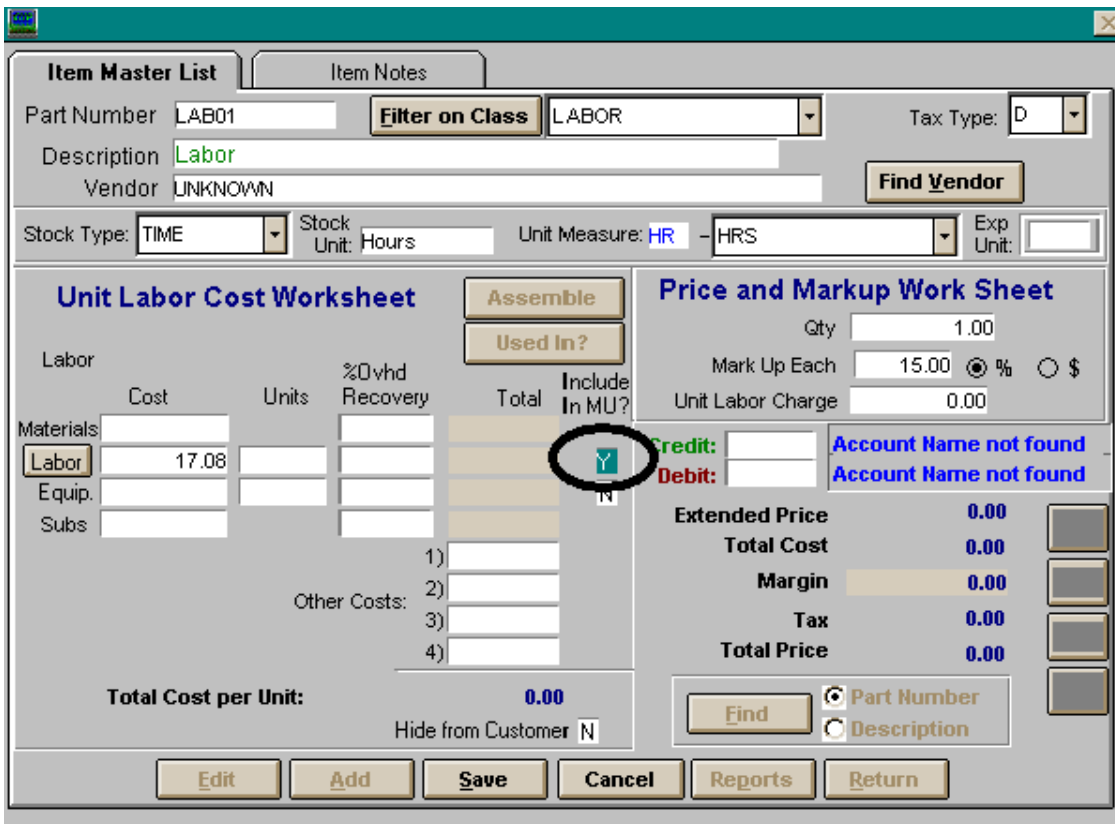
**Entering the Costs**

We will enter the materials cost for Labor.

Your screen should look something like this:



When you hit the Labor button you are asked to Enter the Average Crew Rate and then the % of mark up for labor burden. This formula is used in conjunction with most estimating principals taught by consultants. If you choose not to use this then put cost of the crew/man in the crew rate and the put 0 in the labor burden. Labor burden % normally refers to all the costs related to an employee besides their hourly wage. This includes taxes, work-mans comp, vacation and sick time and other items.



Notice the option of "Include labor In MU" on the labor line. What this means is that when making the mark up on the final run, do we want to treat the labor costs in the same way as we treat the other costs or do we want to mark up the other costs and then just add the labor cost on top of that. In most cases the answer would be to add the labor costs and then mark it up. There are exceptions to every rule and that is why this option is here. When in doubt, place a "Y" here.

Enter the normal quantity and the percent mark up (15%).  
Save your changes and get ready to enter the Travel Time.

### Entering the Travel Time

#### Adding a new part

To add a new part, press the "Add" button.

Press the down arrows on your keyboard to select the labor. The labor and the Travel Time are very similar. Press enter on your keyboard to select the Labor as our pattern. This will copy all of the information from "labor" down to the new part helping us with some of the data entry.

#### Enter the Part Number.

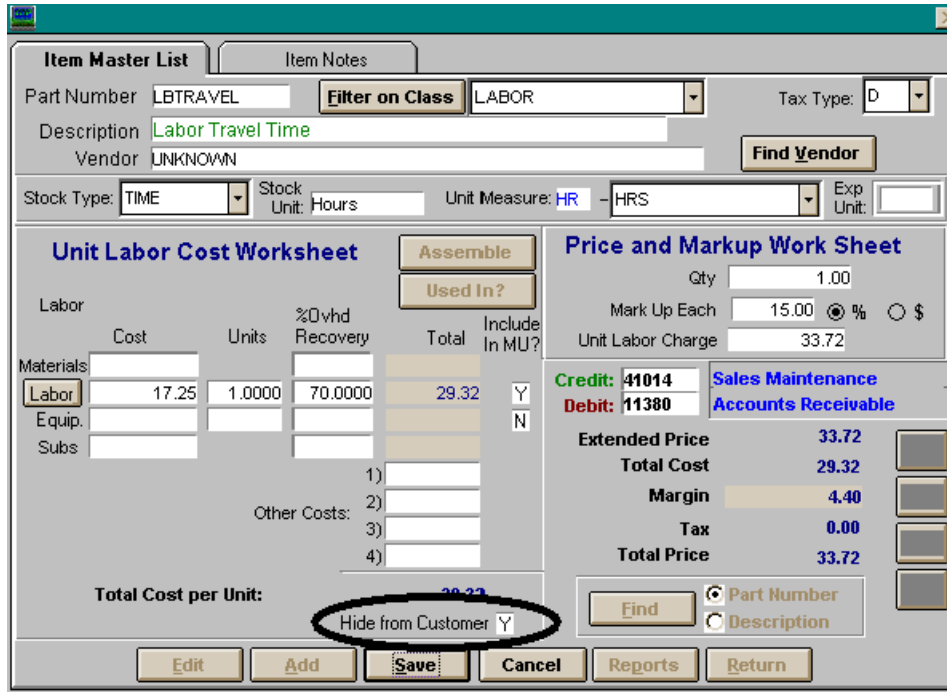
A part number for labor could be "LBTRAVEL" for Labor Travel Time.  
Set the class type as "LABOR", Set the tax type to "D" (No sales tax).  
Set the description to "Labor Travel Time".

////////////////////////////////////CLIPPro////////////////////////////////////

Stock type will be "TIME".  
 Unit type will be "HRS"  
 The unit measure (How is it counted?) will be "HRS".

**Entering the Costs**

We will enter the labor cost for Travel Time.  
 Your screen should look something like this:



Notice the option of "Hide from Customer". You will probably want to mark this with a "Y" because we do not need to show this to the customer. What this means is that when making up the proposal, CLIP will take the cost of this item and reallocate it to the other labor costs. This is a sure way of making sure that you include all of your costs into the final proposal and yet you do not show this particular item to your customer.

Enter the normal quantity and the percent mark up (15%).

Save your changes.

**Creating a new assembly  
 Adding a new part**

To add a new part, press the "Add" button.

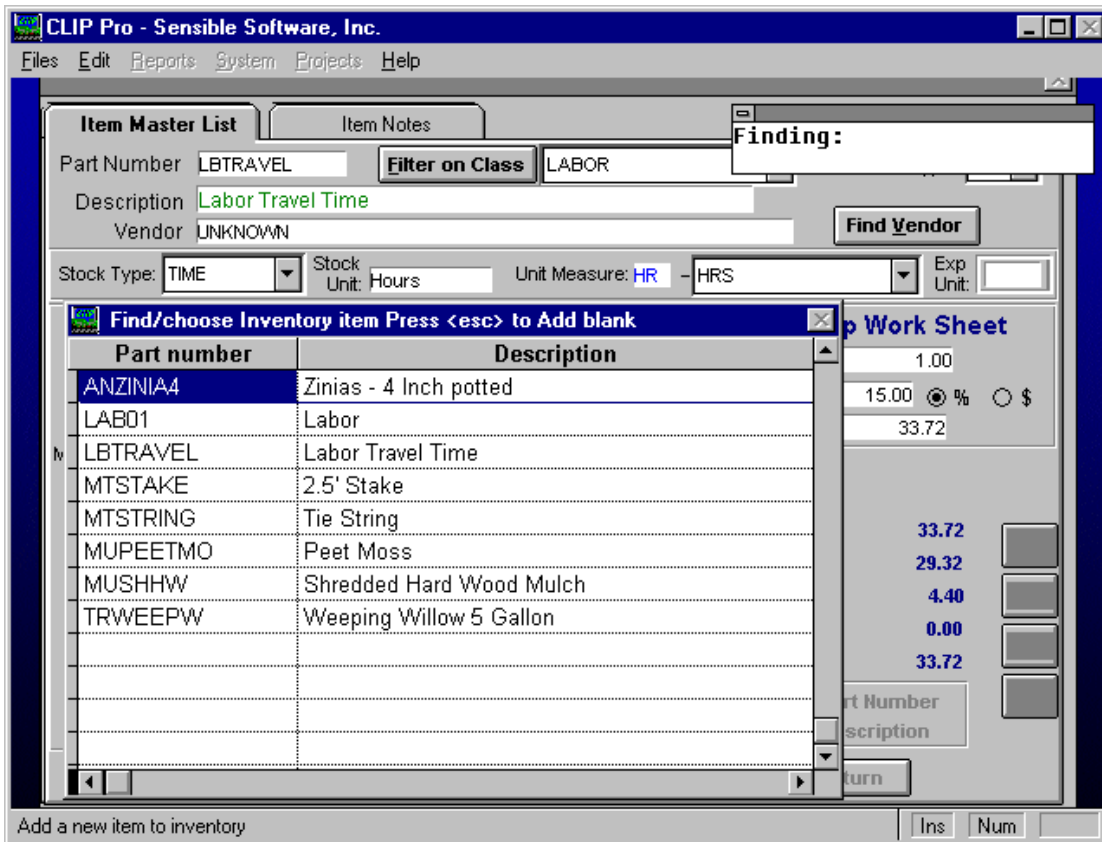
This new part will be an assembly. An assembly is a part that consists of various parts and quantities. In this case we will create an assembly called "Plant a Tree". This assembly will include a tree, three stakes, some peat moss, some mulch and labor. By creating this assembly we can use it over and over again in various projects and never have to worry about making sure we included everything necessary to plant a tree.

The main difference between an assembly and a part is that the stock type is listed as an ASSEMBLY. This means that you cannot enter the costs in directly to the assembly since it is made up of parts. All the costs are calculated from

## Projects/Bidding/Estimating

the parts.

Press Escape on the "Copy from Pattern Screen" because we will want to add a blank here.



### Enter the Part Number.

A part number for this assembly could be "TRAWEEPW" for Tree - Assembly - Weeping Willow.

Set the class type as "PLANT", Set the tax type to "D" (No sales tax).

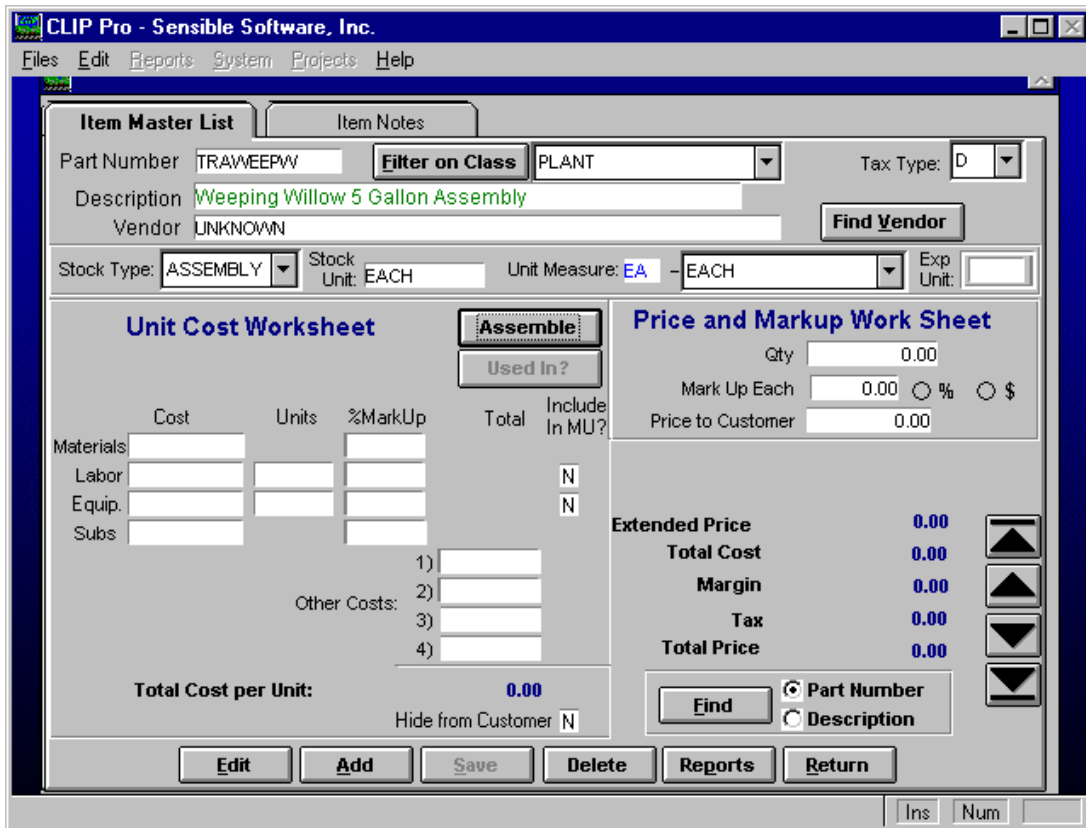
Set the description to "Weeping Willow - 5 Gallon Assembly".

Stock type will be "ASSEMBLY".

Unit type will be "EACH"

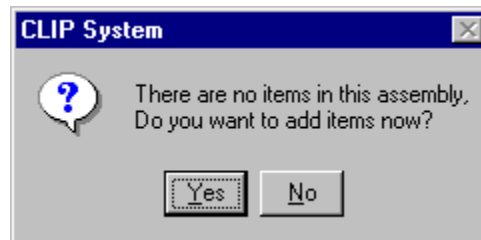
The unit measure (How is it counted?) will be "EA".

Now press the "SAVE" button to register the Assembly.



### Assembling the Part

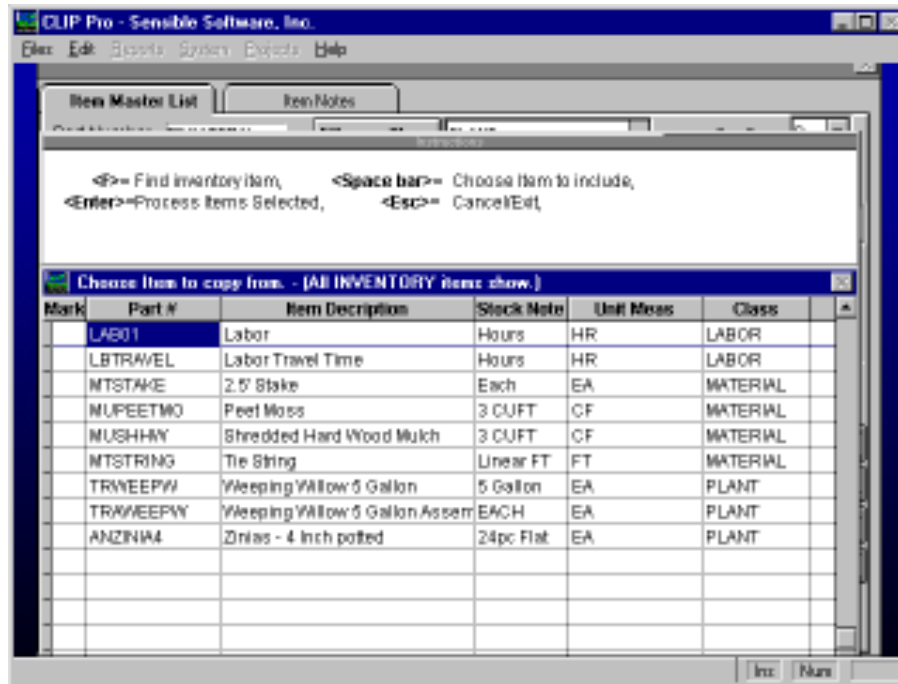
After Saving the changes, press the "Assemble" button. You will be asked if you want to add parts, press "Yes".



You will be presented with all the parts that we have entered so far. Use the arrows to move up and down and use the space bar to mark the items you want included in this assembly.

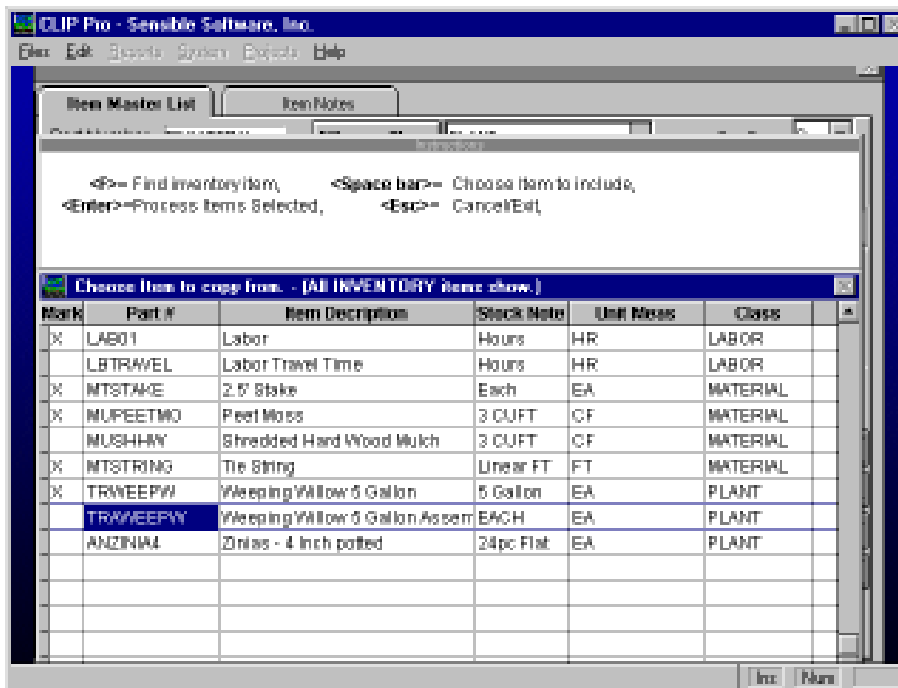
# Projects/Bidding/Estimating

////////////////////////////////////

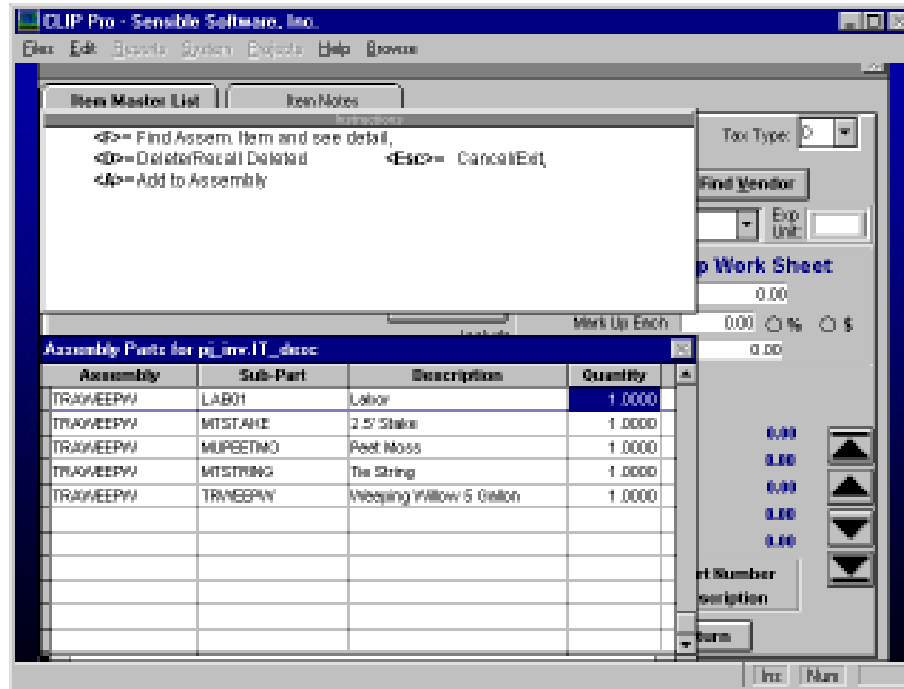


Use the Space Bar to select the items

Press Enter on your keyboard to add the items after selecting.

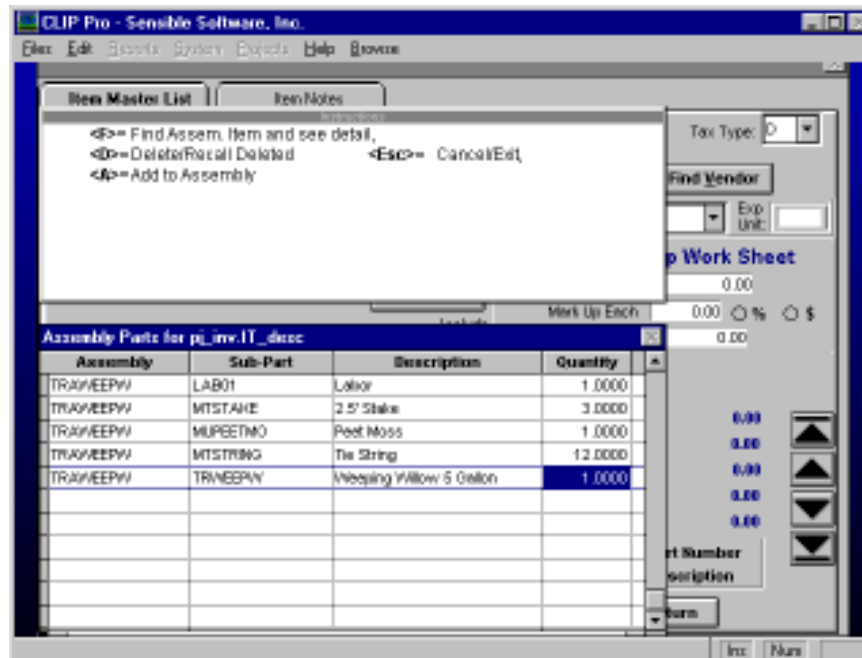


You will now be able to place the quantities into each item that makes up the assembly.



### Entering the Costs

All the costs will be entered in automatically as soon as we assemble it. Press the "Assemble" button.



## Projects/Bidding/Estimating

We entered the following quantities:

- 1 hours of labor
- 3 stakes
- 1 cubic foot of Peat Moss
- 12 feet of string
- 1 weeping willow

Now press the Edit button and change the quantity to 1 and you will see the costs for the assembly.

Mark it up by 15% and we will have a price.

The screenshot shows the CLIP Pro software interface. The main window is titled 'CLIP Pro - Sensible Software, Inc.' and has a menu bar with 'File', 'Edit', 'Reports', 'System', 'Reports', and 'Help'. The 'Item Master List' tab is active, showing the following details for item 'TRAWEEPW':

- Part Number: TRAWEEPW
- Filter on Class: PLANT
- Description: Weeping Willow 5 Gallon Assembly
- Vendor: UNKNOWN
- Stock Type: ASSEMBLY
- Stock Unit: EACH
- Unit Measure: EA
- Exp Unit: (empty)

The 'Unit Cost Worksheet' section shows a table with columns for Cost, Units, %Markup, and Total. The 'Total' column shows a value of 24.14. Below this, there are fields for 'Other Costs' labeled 1) through 4).

The 'Price and Markup Work Sheet' section shows the following values:

- Qty: 1.00
- Mark Up Each: 15.00 %
- Price to Customer: 57.00
- Extended Price: 57.00
- Total Cost: 53.46
- Margin: 3.62
- Tax: 0.00
- Total Price: 57.00

At the bottom of the window, there are buttons for 'Edit', 'Add', 'Save', 'Cancel', 'Reports', and 'Return'. A status bar at the bottom indicates 'Designate whether markup is a percentage or dollar amount' with radio buttons for 'Inc' and 'Doll'.

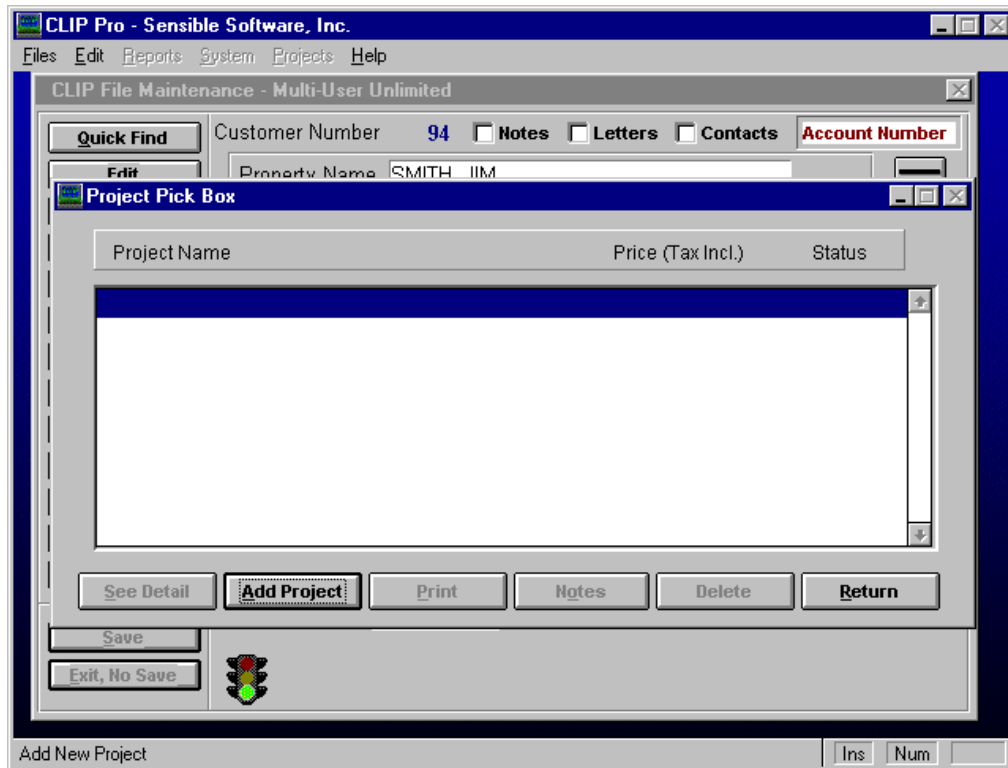
Save your changes.

Lets go over what we just did:

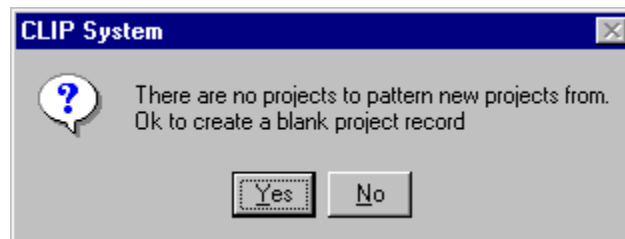
1. We created a number of parts
    - a. Flowers
    - b. Mulch
    - c. Peat moss
    - d. A tree
    - e. Three stakes
    - f. Some string
    - g. Labor
    - h. Travel time
  2. We created an assembly called Planting a Willow tree that includes a tree, labor, stakes, string and peat moss.
- All of these are just items in our inventory that give us the ability to use them in our projects later on.
- We are now ready to actually create a proposal for a customer.

### Create a new project for your new Customer

To create new project, press the "Projects" button from the customers File Maintenance screen. You will be presented with a blank list of the projects for this customer.



Press the "Add Project" button.

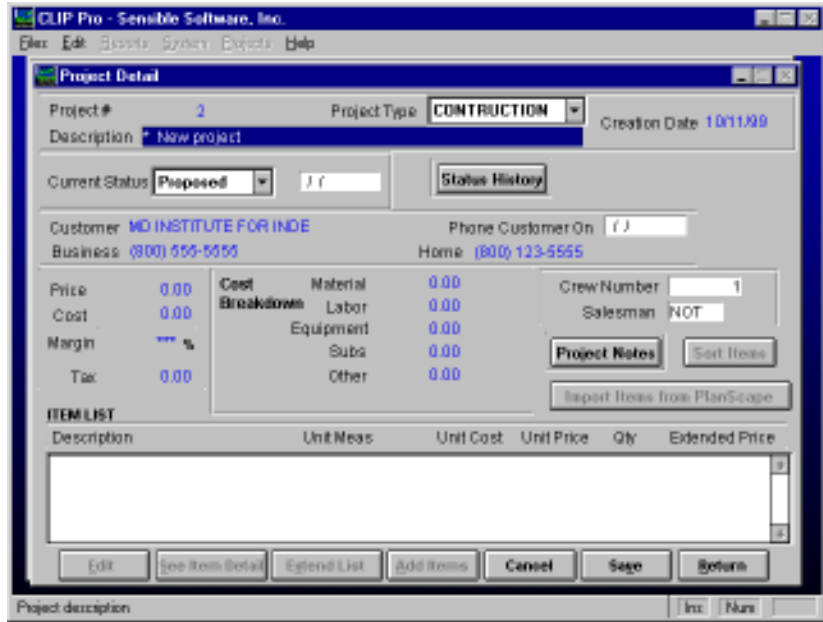


Since this is the first project you are setting up, there are no patterns to choose from. Again, CLIP makes extensive use of Patterns as ways to save you a lot of work and maintain consistency throughout your system. As you create new projects, you will be able to copy these to the new customers and then just adjust the variables and create a new bid very quickly.

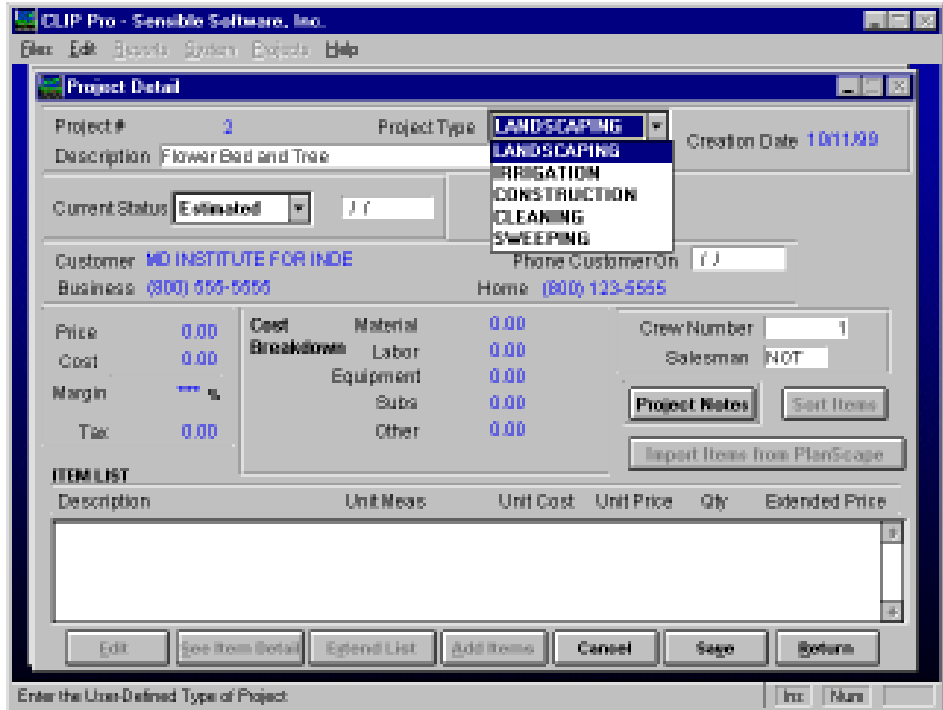
Press the "Yes" button to create a blank project.

# Projects/Bidding/Estimating

////////////////////////////////////CLIPPro////////////////////////////////////



Enter the pertinent information into the Project header:



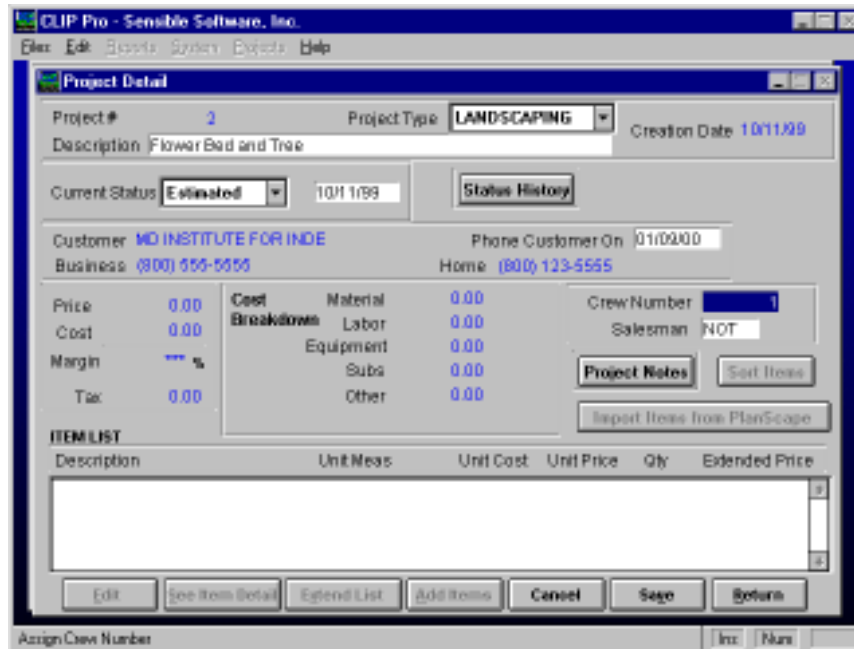
You can choose from any of the options in the pull down for what type of project this is. For this example, choose "LANDSCAPING".

//////////////////////////////////CLIPPro//////////////////////////////////

Choose the status of "Estimated" because you are only in the estimating stage. As you progress through the different stages of the process, you can change the status and enter the date. Later you can see the steps by pressing the "History" button.



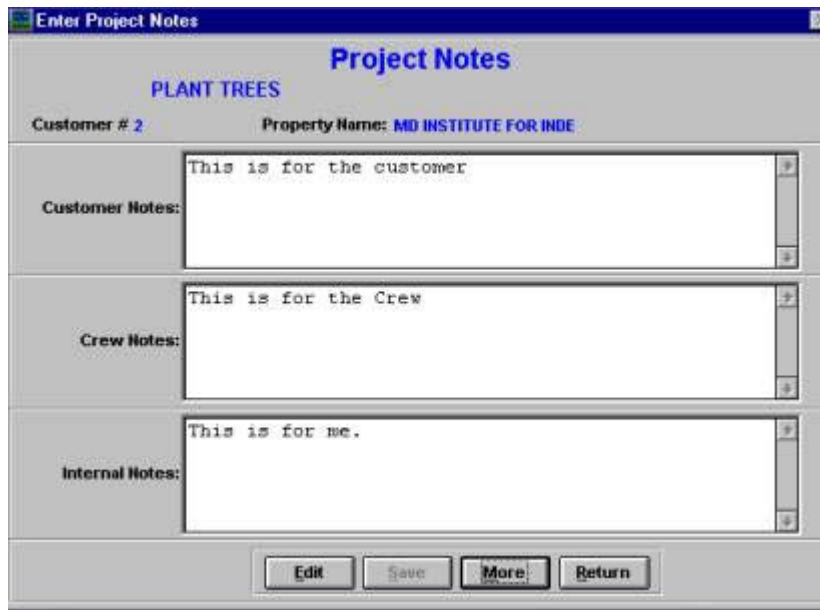
Place a date in the "Phone Customer on:" field to remind you to call the customer back at some time in the future. Enter the Crew number and the salesman's initials.



## Projects/Bidding/Estimating

////////////////////////////////////CLIPPro////////////////////////////////////

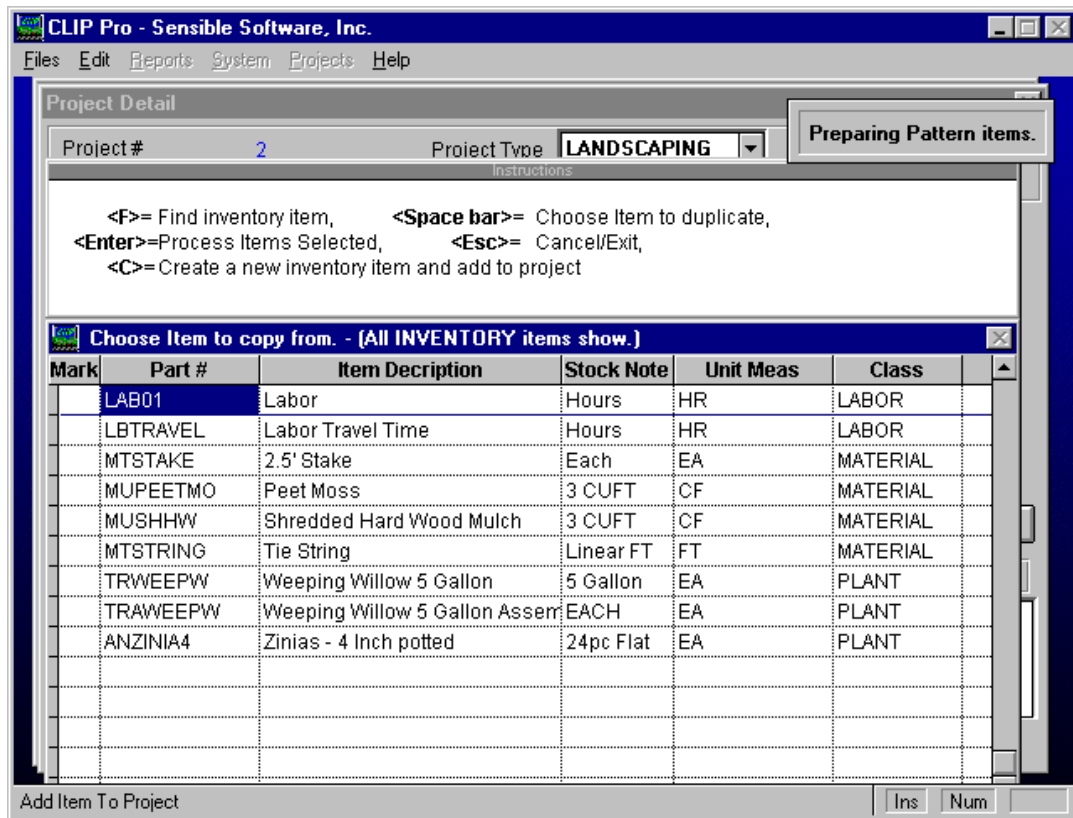
Press the "Project Notes" button. Each project can have notes associated with it, just like a job. These notes can be entered from the main project screen and are for the Customer, for the Crew, just internal to you, or for the work order.



Save your changes and get ready to enter the items.



Press the "Add Items" button to construct the bid.



Now we need to mark all the parts that we want to include in this project

We will want to include the following:

Labor - for the mulch bed

Travel Time - for the project

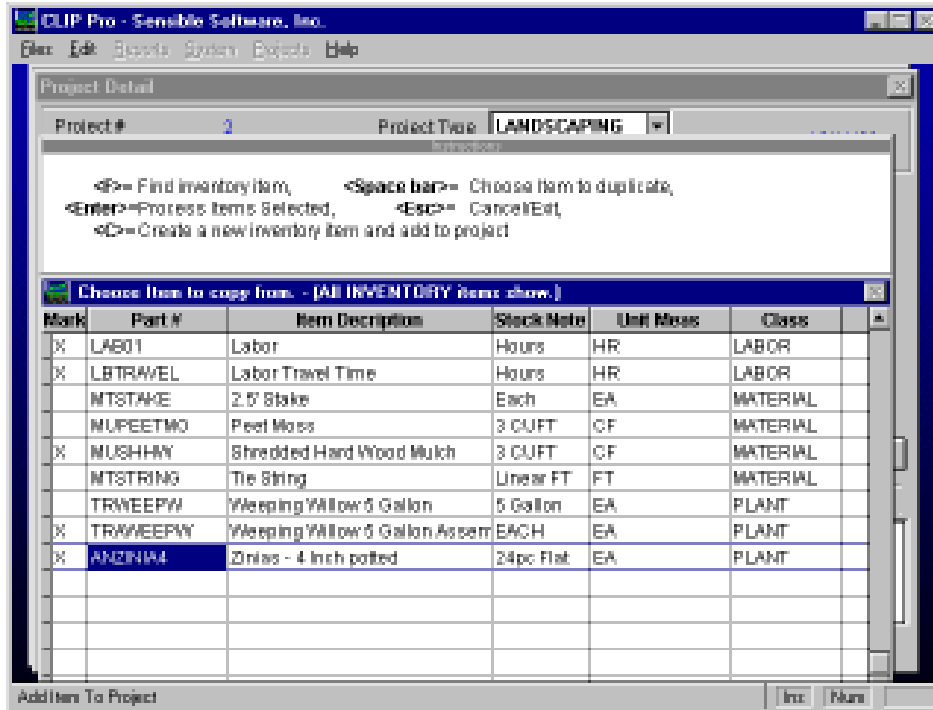
Shredded Hard Wood Mulch - for the flower bed

Weeping Willow Assembly - This will include the stakes, the peat moss, the tie string and the tree.

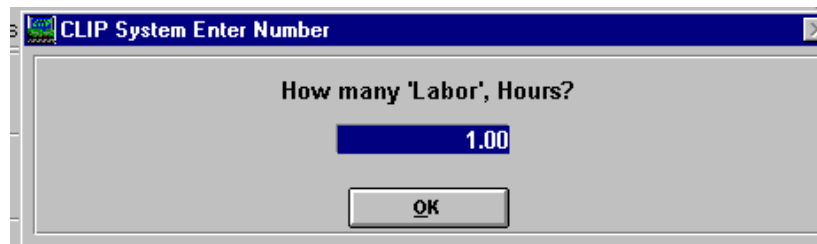
You can use the space bar to "X" off the ones that we want.

# Projects/Bidding/Estimating

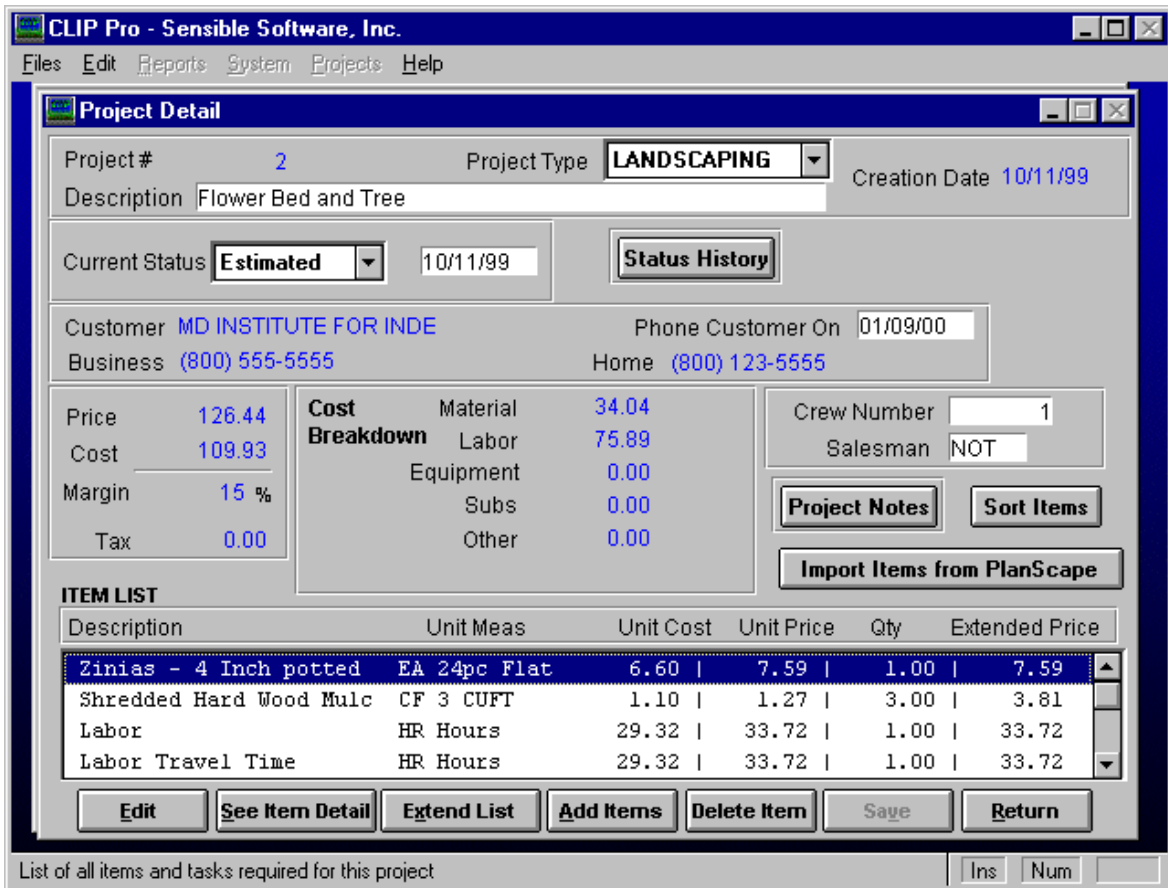
////////////////////////////////////CLIPPro////////////////////////////////////



Press "Enter" after you have marked the items to include.  
Now CLIP will take you through each item you checked off and ask you for quantities. You can adjust the quantities later on or if you know them now, enter them here.



By entering one of everything except the mulch, we entered 3 qty of mulch we have the following:



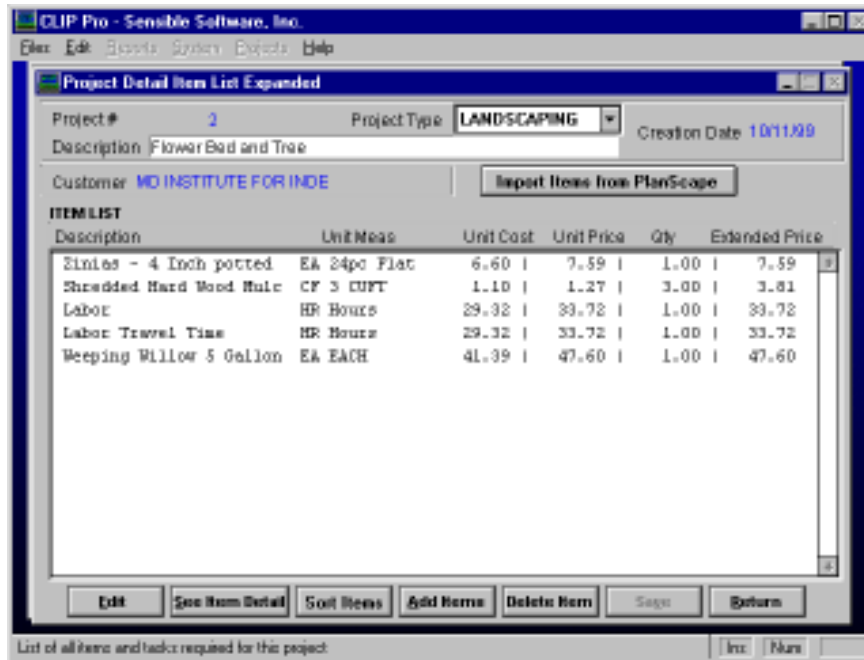
We can quickly see what our margin is in line with all the prices for each category of costs.

We can adjust any amount that we do not think is correct by simply highlighting the item in question and either double click on it or press the "See Details" button.

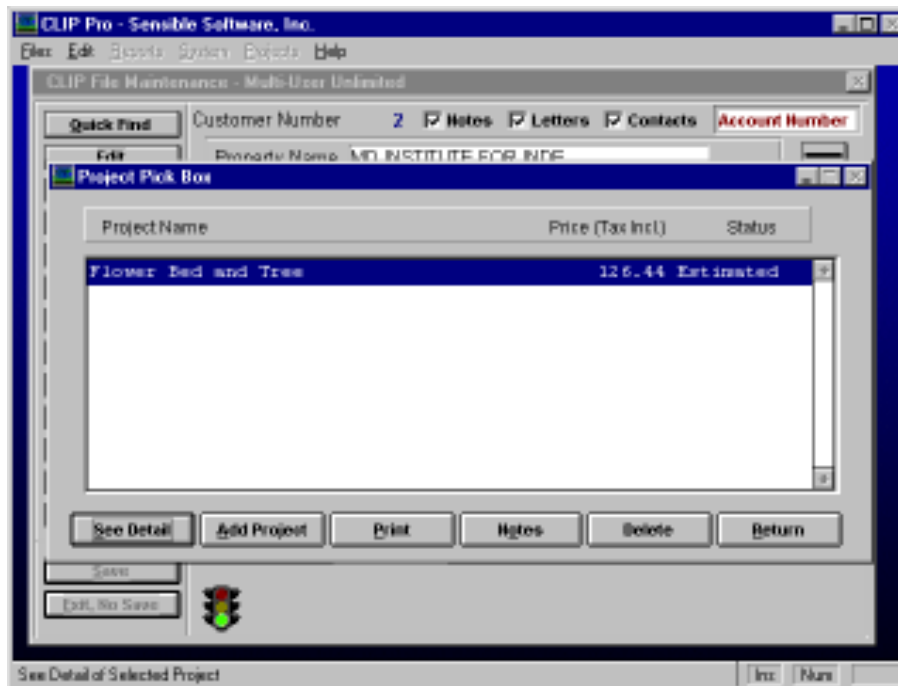
# Projects/Bidding/Estimating

////////////////////////////////////CLIPPro////////////////////////////////////

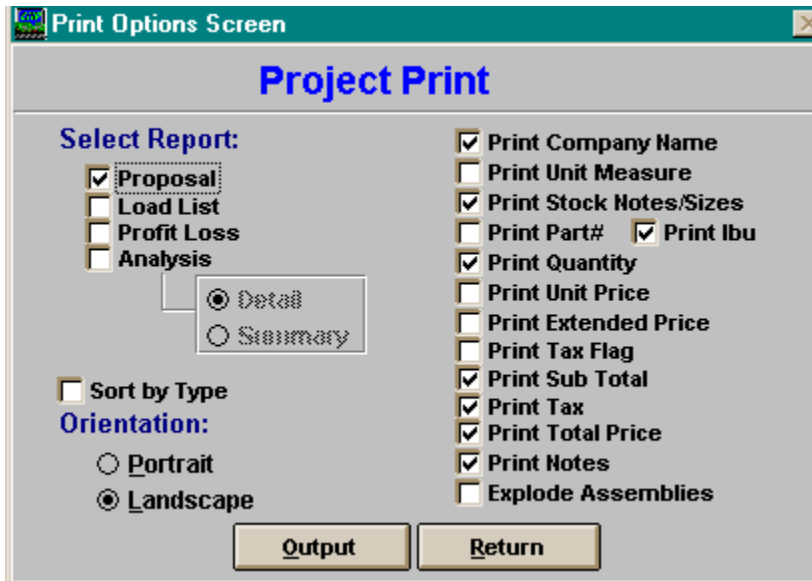
If you press the "Extended List" button, you can see the item list in expanded form.



Now it is time to create a proposal or estimate for the customer. Press "Return" from this screen to go back to the Project list box.



This is where we can print out the information for the customer. Press the "Print" button.



There are a number of options on this screen.

## 1. Reports

### a. Proposal

The proposal is what you will give to your client. All of the options specified on the right hand side of the screen can be used with the proposal. Print one out and notice each column. Each column corresponds with the option.

### B. Load List

The load list will summarize all the parts needed to complete the job. This takes into account all of the assemblies as well as the parts themselves. For example: the Weeping Willow assembly included 3 stakes. If we had changed the quantity to 2, the load list would show that we needed 6 stakes, 3 for each.

### C. Profit/Loss

The Profit/Loss report shows you a quick sketch of the costs and mark ups for each and every part. This is especially good for comparing the project/bid with the plan from Vander Kooi.

### D. Analysis

It shows you an analysis of the amount bid vs. the amount used. This is a true job costing report that will tell you how close you came to your bid.

## 2. Output



When you have chosen the report(s) you desire, you can now press the "output" button to begin the report generation process. You have various options for printing the report.

### A. To Print

This option sends the report to your printer.

### B. To Screen

This option will show you the report on the screen. It is a good idea to see it on screen before printing it to make sure you have everything in place.

### C. To ASCII file

This option will send the report to a TXT file, useful for importing into other software such as a word processor or spread sheet.

### B. To DataBase

This option will send the information to a DBF file that can be used with FoxPro, Access or Excel.

### C. To Excel Sheet

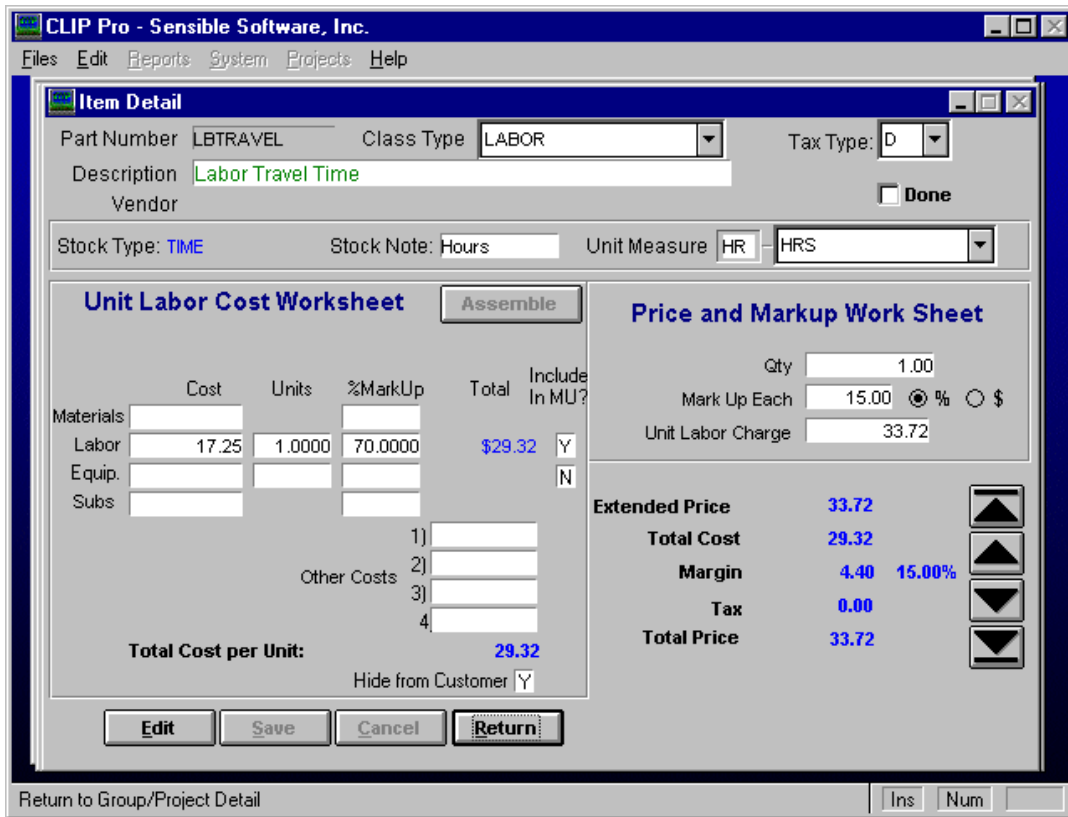
This option will send the information to an Excel spread sheet, allowing you to manipulate the numbers even more.

## 3. Options

Most of these options have to do with the proposal. Experiment with them and you will soon get the right combination for your customers.

**Hide from Customer.**

Remember the option to Hide from Customer? We used it with the Travel time.



The total for our project is: \$126.44 and it includes travel time.

When we print out the proposal for our customer the travel time item disappears and the money for travel (\$33.72) has to be redistributed to the other labor items.

# Projects/Bidding/Estimating

The proposal will look like this:

Sensible Software, Inc.  
2 Professional Drive #246  
Gaithersburg, MD 20878  
(301) 338-8884

MD Institute For Independent Living  
12501 Greenbriar Road  
Potomac, MD 20854

Property Address  
12501 Greenbriar Road  
Potomac

Proposal For  
Flower Bed and Tree

Description	Quantity	Stock Note	Unit	Price per	Salesman NOT Extended Price
Labor	1.00	Hours	HR	67.44	67.44
Shredded Hard Wood Mulch	3.00	3 CUFT	CF	1.27	3.81
Weeping Willow 5 Gallon Assembly	1.00	EACH	EA	47.60	47.60
Zinnias - 4 Inch potted	1.00	24pc Flat	EA	7.59	7.59
Sub Total.....					126.44
Tax.....					0.00
Total.....					126.44

If we uncheck the "Hide from customer" on the travel time, the total remains the same, but the travel time will be listed as an item.

Sensible Software, Inc.  
2 Professional Drive #246  
Gaithersburg, MD 20878  
(301) 338-8884

MD Institute For Independent Living  
12501 Greenbriar Road  
Potomac, MD 20854

Property Address  
12501 Greenbriar Road  
Potomac

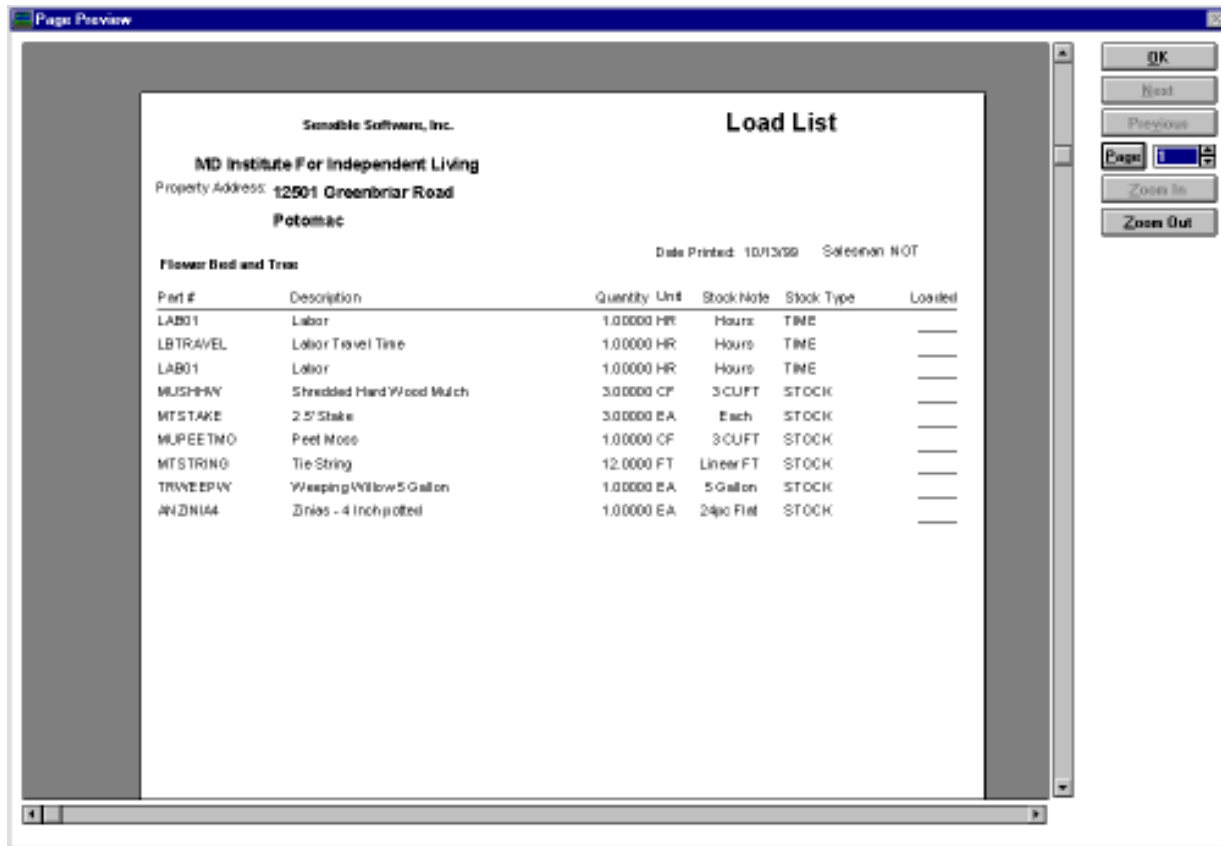
Proposal For  
Flower Bed and Tree

Description	Quantity	Stock Note	Unit	Price per	Salesman NOT Extended Price
Labor	1.00	Hours	HR	33.72	33.72
Labor Travel Time	1.00	Hours	HR	33.72	33.72
Shredded Hard Wood Mulch	3.00	3 CUFT	CF	1.27	3.81
Weeping Willow 5 Gallon Assembly	1.00	EACH	EA	47.60	47.60
Zinnias - 4 Inch potted	1.00	24pc Flat	EA	7.59	7.59
Sub Total.....					126.44
Tax.....					0.00
Total.....					126.44

Other uses for "Hide from customer" include Load/Unload time, Call/Contact time, Difficulty rating... and others.



//////////////////////////////////////CLIPPO//////////////////////////////////////



The report can be used to check off the items or you can print it to fax to your supplier for the latest pricing.

---

**Print out Profit/Loss Report**

The profit/loss report breaks down all of your costs into the 4 main categories and gives you the total number of hours required for this job.

<b>PROFIT/LOSS</b>	
<b>Customer:</b> 2 - MD INSTITUTE FOR INDE	
<b>Project:</b> 2 - Flower Bed and Tree	
<hr/>	
<b>COST OF SALES</b>	
30 % Material cost	\$34.04
47 % Labor Unburdened	\$51.73
69 % Labor Burdened	\$75.99
0 % Equipment	\$0.00
0 % Sub Contractor	\$0.00
0 % Other Costs	\$0.00
<b>Total Cost</b>	<b>\$109.93</b>
<b>Overhead Recovered</b>	<b>\$27.26</b>
<b>Job Cost</b>	<b>\$108.93</b>
<b>Profit</b>	<b>\$16.51</b>
<b>Total Hours</b>	<b>3.0000</b>

This Ends the Tutorial part of the manual that explains how to make a bid. The reference section goes into some more details and teaches you how to record the work as it is completed .

## Reference

---

### Step 1: Set up your Projects module for use

**A: Set Up vendors.** This involves entering your vendors that supply the items required for a project. The vendor list is maintained in the customer database. To add a vendor, use the customer “add” screen under the File Maintenance menu selection; Make sure to check the box labeled “vendor” in add new customer screen. Once vendors are added, you have a Rolodex for tracking suppliers of project items

**B: Set up user defined descriptions.** CLIP comes shipped with some common items you might need, such as unit measure and item category (Trees, Plants, Shrubs, etc.), but you can expand these lists via from the “Projects” - “Project Setup” menu option

**C: Set up inventory.** You need to create a database of all the materials and labor needed to complete a project. The inventory database allows you to: create a time and materials database for your project, track vendors, categorize parts, and set your profit margins to make sure you are making money.

**There are three ways to enter data into the inventory database:**

**1. Manually** If you enter items manually, you will need to establish a numbering scheme to assign part numbers. Assign the part numbers so that they can be found easily. Time spent now will save you a lot of headaches later.

**2. Import from DIG's LandQuote** CLIP will import inventory lists from Design Imaging Group (DIG). This is a landscaping design program which can be purchased through Sensible Software Inc.

**3. Import from Drafix's Pro Landscaping** CLIP will import inventory lists from Drafix's Pro Lanscaping program. This is a landscaping design program which can be purchased through Sensible Software Inc. Both programs allow you to design the project and then send over the items to projects for the Bid to be generated and priced out.

**NOTE:** Your inventory is a list of available items to choose from. It does not actually maintain an inventory level.

### Step 2: Setup a project

Proceed through the eight stages of the project

1. **Lead-** Anyone that has called in requesting an estimate
2. **Estimated-** Projects that you are putting together
3. **Proposed-** Projects that have been submitted to the customer
4. **Approved-** Customer has approved the proposal
5. **Scheduled-** Project is scheduled but not started yet
6. **In Progress-** Project in progress
7. **On Hold-** You have placed the Project on hold for some reason
8. **Finished-**Project is finished

**Step 3: Perform Daily Routines**

A: Setup work orders. Allows you to select which items you will be working on at a particular time.

B: Record work. Allows you to record work done for each item, either in “piece meal” or totally as it is completed. You are able to adjust your estimates to reflect actual quantities and dollars, and then bill whatever you want to charge. Then you can post work/items to the customer’s project history and then to their billing and work history.

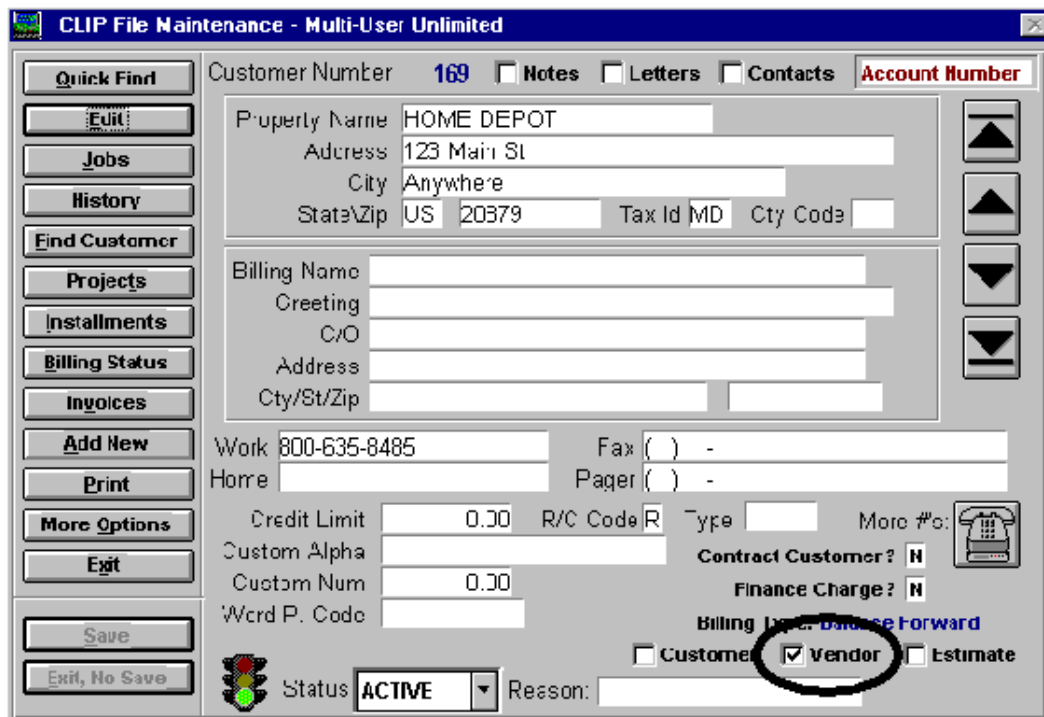
C: Customer follow up. Allows you to keep track of what customers you have scheduled to call.

**Step 1**

**Setting up the basics**

**A: Set Up Vendors**

Enter all your suppliers, vendors, subcontractors, etc. in file maintenance. The customer database is multipurpose in that it can store customers, vendors and estimates.



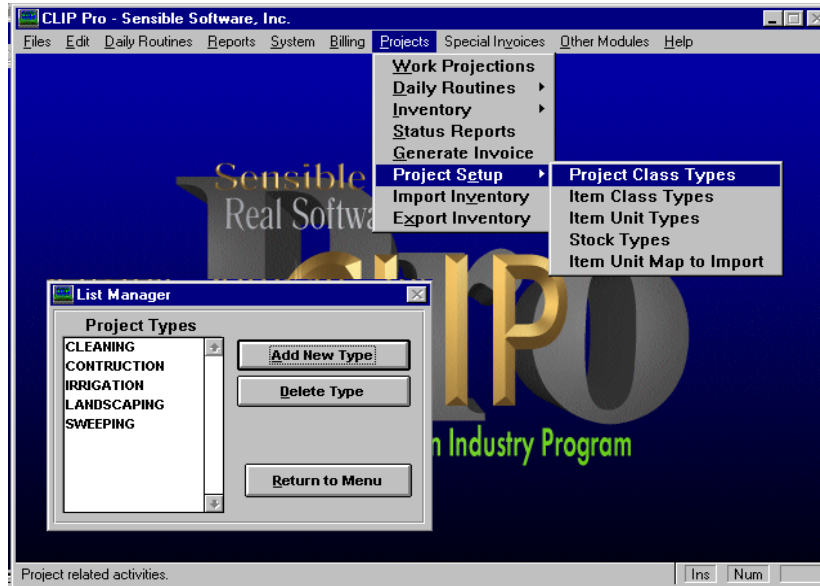
Select vendor as type.

Please note that one contact can be either a vendor, a customer, and estimate or all or any two of the options. Estimate is not used at this time, but we foresee using it for a future enhancement.

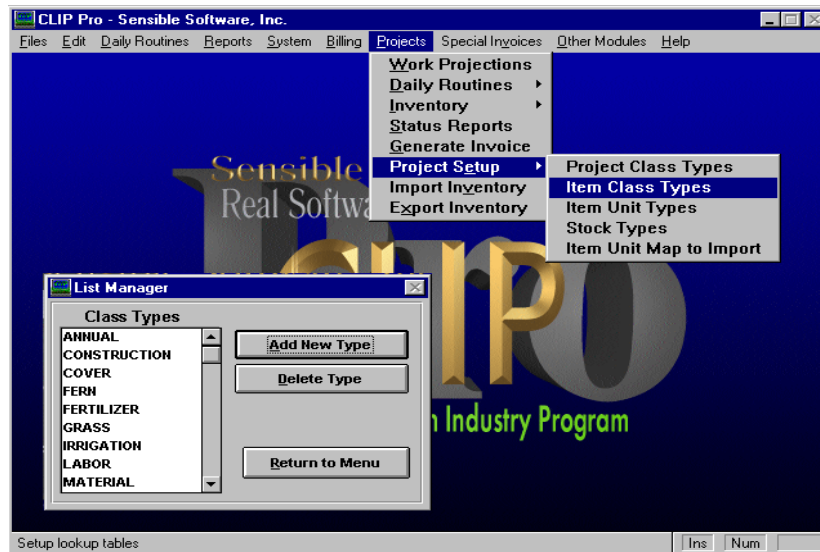


## B: Set up user defined descriptions

**Project Class Types:** used to specify broad types of projects (i.e. construction, landscaping, etc.)

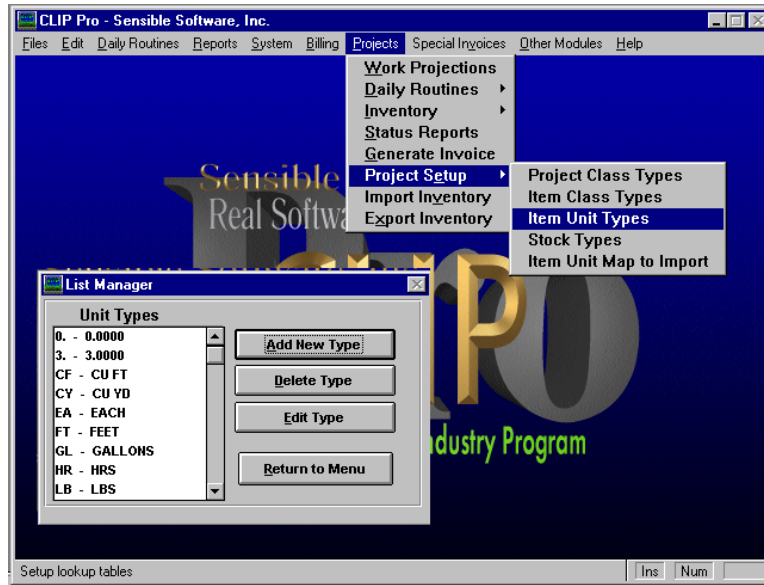


**Item Class Types:** used to categorize the inventory item (i.e. plants, trees, supplies, irrigation, etc.)

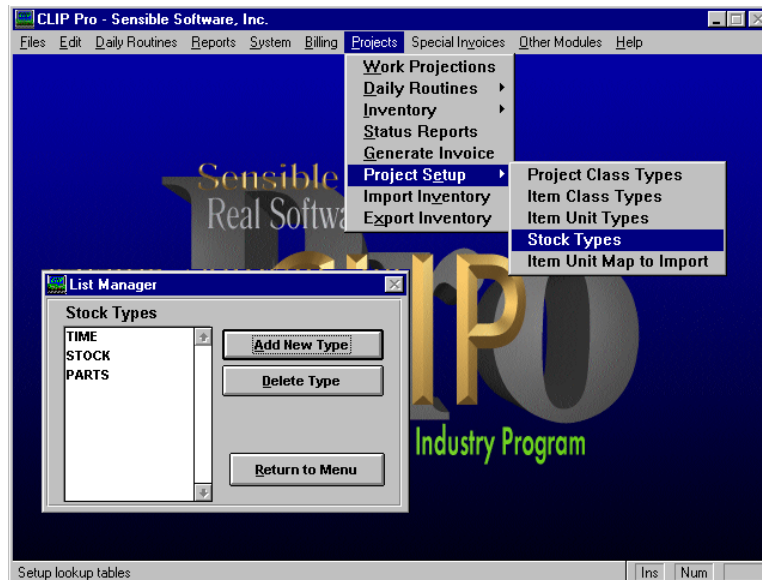




**Item Unit Types:** used to specify the units of measurement you will be using for each item in inventory (i.e. gallon, each, foot, etc.)



**Stock Types:** normally you will only use parts & time in this field. You could however use this field to make sub categories of item class types. (I.e. flowering under the type of plant) If you select "time", Projects will not let you edit fields pertaining to parts.





### C:SET UP INVENTORY

You need to set up your base inventory items. Anything that you will need (including labor) to complete the project should be set up as an inventory item. You will be able to adjust these items on an individual project basis without affecting this initial setup. A good idea would be to gather all the parts and labor from your last few estimates and use this as a base inventory.

(Remember that you can import a complete inventory from LandQuote(DIG) or from an Excel file, if you would rather start out with a ready-made inventory and add your own items later.)

Setup your inventory from the “projects”- “inventory” - “inventory data entry” pull down from your main screen. Select “add”. You can copy from a pattern item or hit “escape” key to make a new one.



**There are two ways to do this:**

**Recommended:** Make an inventory item for each part and then make a separate inventory item for labor. This will allow you to specify the proper tax type for each item and will also allow you to track your project more precisely. This also allows you to mark up items at different rates and allows better reports. It also will keep things more organized in the long run.

**Optional:** If you are not concerned about the tax (maybe labor and parts are the same tax rate) you could enter a corresponding labor figure to do this job. An example might be if you are planting a tree and you can to assign a labor that corresponds to this item. On the other hand if you are putting in a patio and want to set up bricks as an inventory item. You may decide to price each one out and mark it up. It would be almost impossible to come up with a labor figure per each brick. In this case you would use the above method.

#### Assigning Part Numbers

You will be assigning your own part numbers. Make them meaningful. You can use alpha as well as numeric to devise these. An example may be to start all your plant inventory part numbers with a “P”. When Clip does a “find” it uses these as the search criteria. Remember that case counts. A “N” is different than a “n”. We have found that a lot of our customers use all capitols for easy tracking. Below is a recommended naming convention used by a few of our customers.

////////////////////////////////////CLIP////////////////////////////////////

Begin each part with one of the the following two prefixes and a dash after it

- TD- Deciduous Trees
- TE- Evergreen Trees
- SD- Deciduous Shrubs
- SE- Evergreen Shrubs
- PR- Perennials
- AN- Annuals
- HG- Hard Goods
- LA- Labor
- EQ- Equipment
- SR- Snow Removal
- IS- Irrigation Supplies
- SC- Subcontractors

The screenshot shows the 'Item Master List' window for item 'HYD PAN-6'. The 'Unit Cost Worksheet' table is as follows:

	Cost	Units	%Ovhd Recovery	Total	Include In MU?
Materials	1 40.00		2 70.0000	68.00	
Labor	3	4			5 N
Equip.	6				N
Subs	7				
Other Costs:				1) 8	
				2)	
				3)	
				4)	
<b>Total Cost per Unit:</b>				<b>68.00</b>	

The 'Price and Markup Work Sheet' shows:

- Qty: 1.00
- Mark Up Each: 10.00 %
- Price to Customer: 74.80
- Credit: 41011
- Debit: 11380
- Extended Price: 74.80
- Total Cost: 68.00
- Margin: 6.80
- Tax: 0.00
- Total Price: 74.80

Buttons at the bottom include Edit, Add, Save, Cancel, Reports, and Return.

**#1 Materials:** This is the cost or price you pay to the vendor.  
**#2 % Overhead Recovery:** This is the percentage the materials cost that you use to recover overhead. This % should not be randomly made up but based on a system. Professional systems made for the industry are available. If you do not use this, just leave it as a blank or 0.

////////////////////////////////////CLIPPRO////////////////////////////////////

**#3 Labor:** The cost of labor is figured out by multiplying average crew wage x % of labor burden. This formula is used in conjunction with most estimating principals taught by consultants. If you choose not to use this then put cost of the crew/man in the crew rate and put 0 in for the labor burden. Labor burden % normally refers to all the costs related to an employee besides their hourly wage. This includes taxes, work-mans comp, vacation and sick time and other items.

**#4 Units:** This is where you enter the number of units associated with this item. Normally this will be 1 when you are setting up the master inventory. You can combine labor with material; however, it is better accounting practice to separate labor from material.

**#5 Include in mark up:** If you are combining a part with labor do you want to mark up the labor using the same markup as the part. Otherwise you can mark up labor manually

**#6 Equipment:** This is the cost of equipment. You have the choice to include this in the markup ( normally you will ) . Remember it is recommended that you create a separate inventory for each piece of equipment to have the most accurate bid. You will most likely want to hide this amount from the customer.

**#7 Sub Contractor's cost:** This is the cost that the subcontractor charges you for his services involved in this project. You may choose not to use this but mark it up using the markup sheet. Again you should make this a separate inventory item.

**#8 Other Costs 1-4:** This is where you would place other costs that might apply to this item but are not covered in the other categories. These items must contain overhead recovery already and will be marked up.

**#9 Hide from Customer:** This is an extremely powerful feature. It allows you to make the most accurate bid possible by allowing you to including items such as travel time, set up, load trucks, price out all the equipment needed and many others. These items you would not want to show the customer but the costs must be included in the bid. If you have Hide form customer marked as Yes. The Price to Customer field will be distributed proportionally to all items that contain labor on your bid. If you only have one labor item the total amount will go there. This "inflated" amount will only show when you print out the customers bid. All your work sheets and reports will show you all the items, hidden or not.

### Step 2

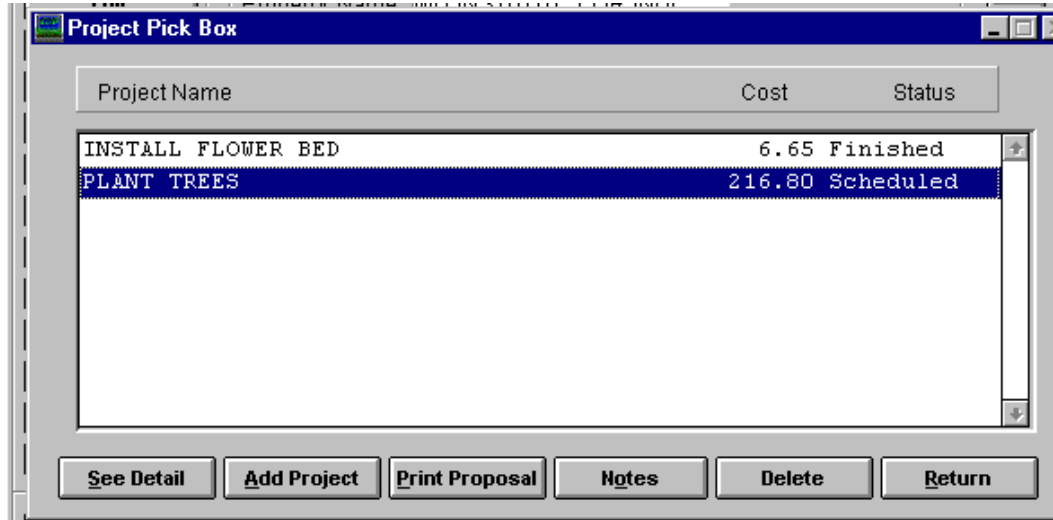
#### Setting Up A Project

A project is a one time job that involves both labor and materials. A customer can have an unlimited number of projects. You can add projects in the same way you add jobs to the customer.

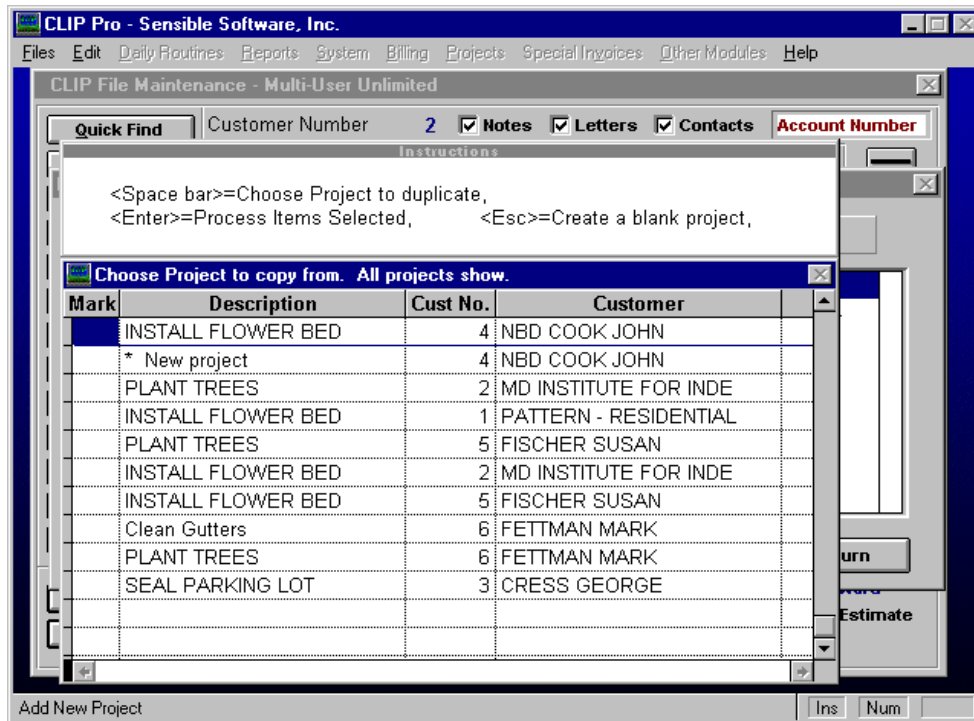
Select or Create a Customer for This Project

The program starts from the customer's main screen with the <Projects> button. This button will take the user to a list of the projects already created for the customer or allow the user to add a new project. The Project Pick Box is similar to the Job Pick Box. It has buttons for Add, Delete, See Detail, and Return.

////////////////////////////////////CLIPPro////////////////////////////////////



You can choose from other projects as patterns to save you time in setting them up



If you are adding a new project you will be sent to the details screen to fill out the information or if you are copying from a previous project you can select "See Details".

////////////////////////////////////CLIPPro////////////////////////////////////

Status History” will display the dates of each of the six steps of the project

**Start adding items to your project.** Press the Add Items button.

**There are two ways to find an item that you have in your list.**

**1. Use the <F> key to find by part number.** Then type the part number and CLIP will automatically search for the part. When you are on the item you want, press <enter> to return to the first screen. Then press the <space bar> to mark the item(s) to be added.

**2. Use the Edit feature to find by part name** ( located on the very top of your screen ). Select Find. You can type in either the complete part name or the first few letters to get you to the section of the inventory you are looking for. When you are on the item you want, press the <space bar> to mark the item(s) to be added.

After you have finished marking all the items needed, press the <enter> key.

If you do not have the item in your inventory list you can create a new one on the fly. The screen below lists items from the Inventory data file. If you need an item that is not yet in the inventory, press the <C> key. This brings up the “add” screen for inventory.

Part #	Item Description	Stock Note	Unit Meas
** New Part no	** New description **	1 GAL	TN
89898	** New description **		SF
A8666	LAY RAILROAD TIES		HR
CAM0001	CAMILLIAS		EA
HG234	TULIPS	POT	SF
L000001	LABOR		HR
L00001	MOW AND TRIM		SF
P12345	HOFTAS	5 INCH	EA
P23456	IMPATIENCE	POT	EA
PPP2345	IRISES	BATCH	SF
S456789	ROAD PAINT	5 GAL	GL
T00001	CYPRIS TREE	50	LB
T00002	BLUE SPRUCE	30	LB
T00003	JAPANESE CHERRY TREE	Stock Hold	GL
T00005	ROSA SHARANS	2	GL

When you add an item to the inventory database and press the <return> button, CLIP will prompt you to enter the quantity of the item that you created. After items are added into the project you can go in and edit them.

////////////////////////////////////CLIPPro////////////////////////////////////

**Project Detail**

Project # 28 Project Type **CONSTRUCTION** Creation Date 11/24/00  
Description Flower Bed and Tree  **Contract Job**

Current Status **Proposed**  **Status History**

Customer **CRESS GEORGE** Phone Customer On   
Business **CLIP System Enter Number**

Price   
Cost   
Margin   
Tax

**How many 'Foster's Holly / 2 1/2-3"', 2 1/2-3"?**

**OK**

**ITEM LIST**

Description	Unit Meas	Unit Cost	Unit Price	Qty	Extended Price

**Edit** **See Item Detail** **Extend List** **Add Items** **Cancel** **Save** **Return**

//////////////////////////////////////CLIPPO//////////////////////////////////////

**Item Detail - The Price Calculation Area:**

The screenshot shows the 'Item Detail' window with the following information:

- Part Number:** ILE ATT1-30
- Class Type:** TREE
- Tax Type:** D
- Description:** Foster's Holly / 2 1/2-3"
- Vendor:** Interface Systems, Inc.
- Stock Type:** STOCK
- Stock Note:** 2 1/2-3"
- Unit Measure:** EA EACH

The window is divided into two main sections:

- Unit Cost Worksheet:**

	Cost	Units	%Dyhd Recovery	Total	Include In MU?
Materials	25.00		10.00	\$27.50	
Labor					N
Equip.					N
Subs					
Other Costs					
1)					
2)					
3)					
4)					
<b>Total Cost per Unit:</b>				<b>27.50</b>	
- Price and Markup Work Sheet:**
  - Qty: 1.00
  - Mark Up Each: 15.00 %
  - Price to Customer: 31.63
  - Extended Price: 31.63
  - Total Cost: 27.50
  - Margin: 4.13 (15.01%)
  - Tax: 0.00
  - Total Price: 31.63

At the bottom, there are buttons for Edit, Save, Cancel, and Return. A credit/debit summary shows:

- Credit:** 41011
- Debit:** 11380

Accounting entries are listed as Sales Construction and Accounts Receivable.

When an item is brought into a project it is a copy of the master item of all its information and pricing. Each item has a detail sheet that came from the inventory file. This gives you total flexibility to adjust each cost and price for each item regardless of what is in your inventory. You can adjust the unit cost to prevailing price.

You might want to change the Mark up and price to the customer, depending on the project and your specific needs.

**Note: Changing any information on an item on a project does not change it back in the master inventory**



**Price and Markup Work Sheet**

Qty

Mark Up Each   %  \$

Price to Customer

---

<b>Extended Price</b>	<b>31.63</b>	
<b>Total Cost</b>	<b>27.50</b>	
<b>Margin</b>	<b>4.13 15.01%</b>	
<b>Tax</b>	<b>0.00</b>	
<b>Total Price</b>	<b>31.63</b>	

This area shows the price to the customer. You can adjust the prices and quantities of this item for this specific project.

**Qty:** First enter the quantity of this item that you will use in this project.

**Mark Up: Each:** Enter the amount you wish to mark up. Then choose either a dollar or a percentage (\$ or %) markup. If you enter a 5, do you want to mark it up by 5 percent or by 5 dollars each?

**Price to Customer:** This is the price to your customer. You can manually adjust this price.

**Cost calculation Area:** This area shows the total cost to you and cost margin. If the cost margin is negative, it will cost you more to do this job than the money you will make.

**Projects Notes:**

Project Pick Box

Project Name	Price (Tax Incl.)	Status
Flower Bed and Tree	31.63	Proposed



**Enter Project Notes**

**Project Notes**

**Flower Bed and Tree**

**Customer # 1001**      **Property Name: CRESS GEORGE**

**Customer Notes:** These are unlimited and will print on the proposal at the end. You may use this for specs, warrenties, etc.

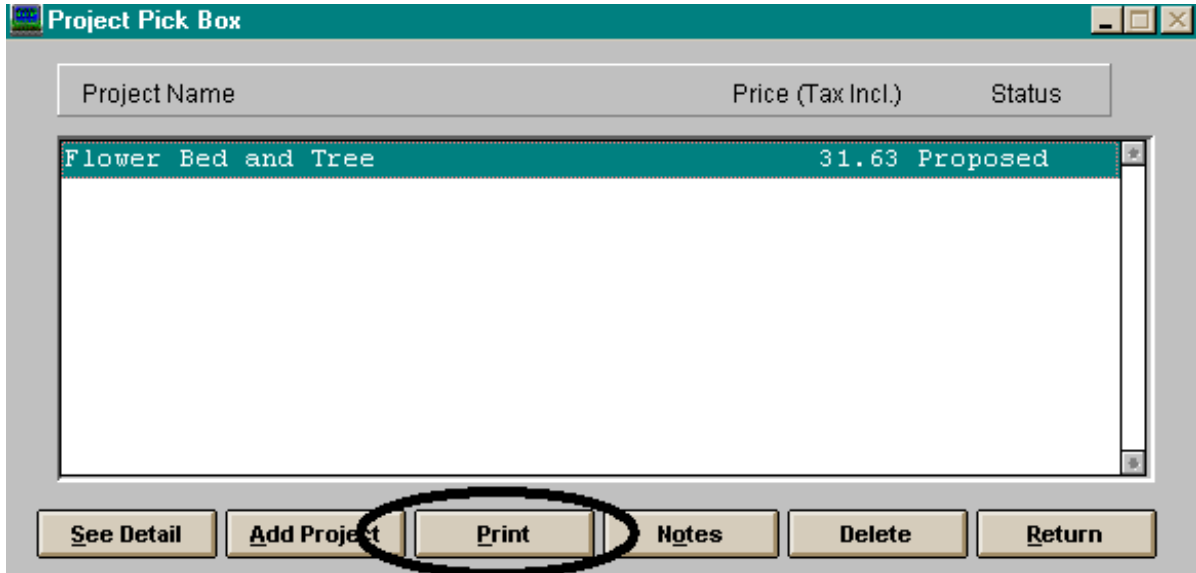
**Crew Notes:** These will print out on the work orders for your crew

**Internal Notes:** Thes are internal notes

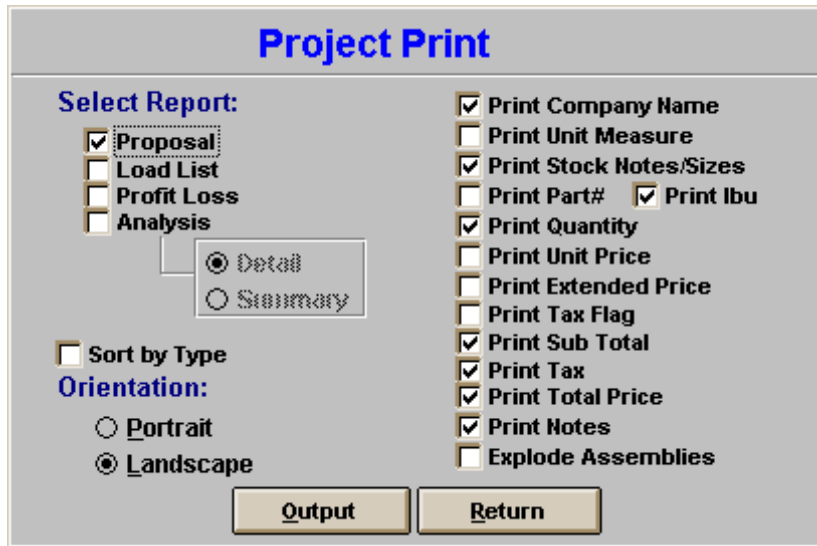
**Edit**   **Save**   **More**   **Return**

Each project can have notes associated with it, just like a job. These notes can be entered from the main project screen and are for the Customer, for the Crew, just internal to you, or for the work order.

When you have constructed a project with all the items in it, with all the mark ups done and you are sure that you are making profit on each item, you are ready to print out the proposal and present it to the customer.



You can print out a proposal from the Print button.



There are a few options on the print button.

**Proposal:** Use this to print out a bid for the customer. Remember that the prices will be different then in the project in CLIP depending if you have chosen to hid items from the customer.

**Load List:** This can be used for sending out a list to your vendor for pricing or ordering (See also the materials usage report from the projects menu) and it can also be used for your employees to load the truck so nothing is forgotten.

//////////////////////////////////////

<b>Sensible Software, Inc.</b>		<b>Load List</b>				
<b>Mrs. George Cress</b>						
ty Address: <b>3789 Barton Way</b>						
<b>Anytown</b>						
<b>lower Bed and Tree</b>				Date Printed: 11/24/00    Salesman NOT		
	Description	Quantity	Unit	Stock Note	Stock Type	Loaded
T1-30	Foster's Holly / 2 1/2-3"	1.00000	EA	2 1/2-3"	STOCK	___
RA-25	American Beech / 2-2 1/2"	1.00000	EA	2-2 1/2"	STOCK	___

**Profit Loss:** Shows a breakdown of costs and overhead recovery by category

////////////////////////////////////CLIPPO////////////////////////////////////

**Customer:** 1001 - CRESS GEORGE  
**Project:** 28 - Flower Bed and Tree

PROJECT EVALUATION SUMMARY		- PROFIT/LOSS		
COST OF SALES	BID		ACTUAL	
	\$	%	\$	%
RawMaterial cost	\$25.00	79.0	\$0.00	***.*
Material OVHD	\$2.50	7.9	\$0.00	***.*
Labor with Burden	\$0.00	0.0	\$0.00	***.*
Labor OVHD	\$0.00	0.0	\$0.00	***.*
Equipment	\$0.00	0.0	\$0.00	***.*
Equipment OVHD	\$0.00	0.0	\$0.00	***.*
Sub Contractor	\$0.00	0.0	\$0.00	***.*
Sub Contractor OVHD	\$0.00	0.0	\$0.00	***.*
Other Costs	\$0.00	0.0	\$0.00	***.*
<b>Total Cost</b>	<b>\$27.50</b>		<b>\$0.00</b>	

**Analysis:** is for you to check your work and make sure that you are creating a profitable project.

# Projects/Bidding/Estimating

//////////////////////////////////////CLIPPO//////////////////////////////////////

**Ijamsville, MD 21754**  
**(800) 635-8485**

**Project Analysis:**

Customer: Project  
**Mrs. George Cress**  
**3789 Barton Way**  
**Anytown, MD 55501**

Project Name:  
**Flower Bed and Tree**

Description	Man Hours	Labor \$	Qty	Overhead Recovery	Other Costs	Sub Contract Costs	Material Unit Costs
Foster's Holly / 2 1/2-3'			1.0000	2.50	0.00	0.00	25.00
	≡ Act	0.00	0.0000	0.00			
	Bill						
American Beech / 2-2 1/2"			1.0000	0.00	0.00	0.00	0.00
	≡ Act	0.00	0.0000	0.00			
	Bill						
Flower Bed and Tree Total			≡	2.50	0.00	0.00	25.00
	≡ Act	0.00		0.00	0.00	0.00	0.00
	Bill						

These are internal notes

These are unlimited and will print on the proposal at the end. You may use this for spec

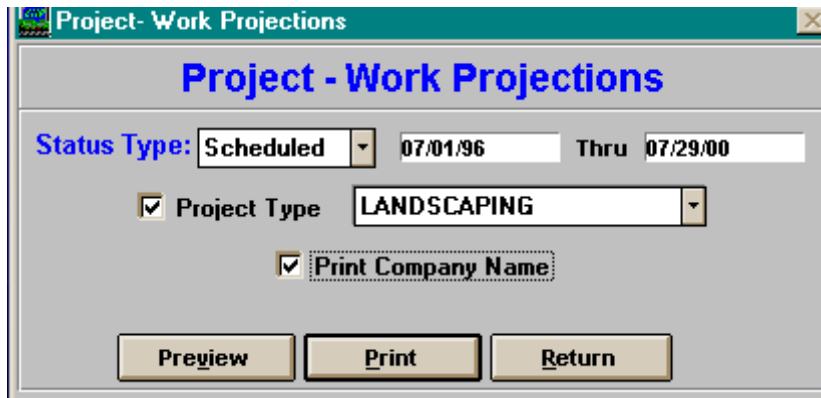
These will print out on the work orders for your crew

**After the customer approves the Bid go to the customers Project and change the project status to Scheduled.** Unless you change it to Scheduled it will not show up latter on when you want to record the work as done. The Scheduled and the Finished status are the only two that actually drive the program. The rest are for your information.

**Reports**

**Work Projections**

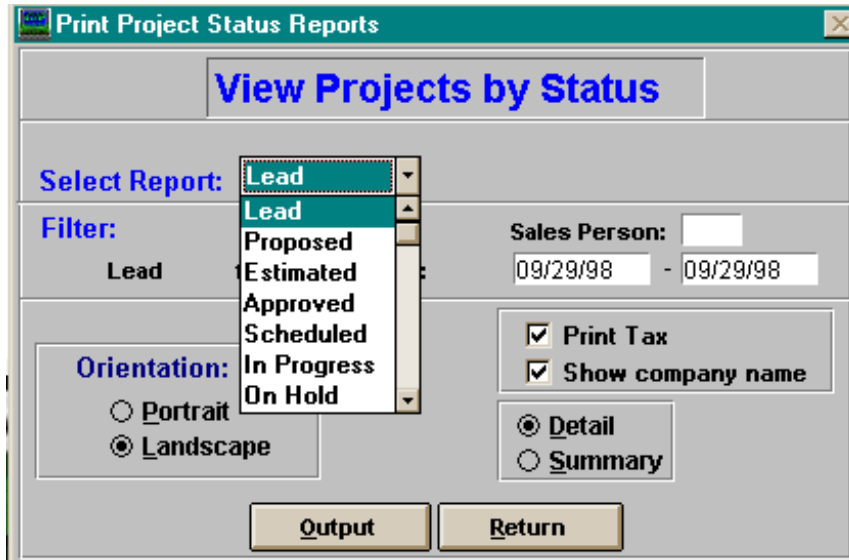
Work projections allows you to print out the schedule for a future date. Use this report to see what is coming up and what man power you will need. (See sample reports)



**Project Status Report**

To view projects in various stages use the Status Report





### Materials Usage

This report is great for a nursery fax sheet for getting current prices on a project or combined projects. , this also allows you to see how much of an item has been used through using multiple filters.



////////////////////////////////////CLIPPO////////////////////////////////////

The screenshot shows a software window titled "Materials Report". The window has a title bar with a close button. Below the title bar, the text "Materials Report" is displayed in a large blue font. The main area of the window contains several sections:

- Filter:** A dropdown menu for "Status" is set to "Scheduled". Below it, a date range "Scheduled for the period of:" is shown as "01/01/98 - 09/21/00".
- Item Selection:** There are four checkboxes: "Item Class", "Project", "Vendor", and "Materials". All are currently unchecked.
- Orientation:** Two radio buttons are present: "Portrait" (unchecked) and "Landscape" (checked).
- Display Options:** Four checkboxes are checked: "Print Tax", "Show company name", "Show Cost", and "Show Vendor". A "Vendor Sort" checkbox is unchecked.
- View Options:** Two radio buttons are present: "Detail" (checked) and "Summary" (unchecked).
- Buttons:** At the bottom, there are two buttons: "Output" and "Return".

As you select the Item Class, Project, or Materials you will shown items and projects that meet your Status and Date filters. You can choose what you want by using the space bar. This feature allows you to combine parts that are used multiple projects and give you one fax out sheet for your vendor. You can even narrow it down by Vendor and Item Class.

Work Projections - Sample Report

List of Projects not finished in start date order

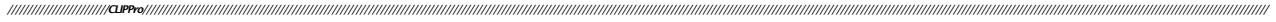
Sensible Software, Inc.  
 9639 Dr. Perry Rd, Suite 123  
 Ijamsville, MD 21754  
 (800) 635-8485

Date Printed: 10/08/98

Page No.# 1

Acct#	Customer Name	Project Description	Project Status	Project Type	Crew	Proposal Date	Approved Date	Start Date	Total Cost	Total Price	Total Labor Units
17	#1 COMPUTER	LABOR FOR PATHWAY	Scheduled	SUBCONTRAC	30	/ /	/ /	08/01/98	2975.00	0.00	85.00
10	CARBORUNDUM	ELECTRICAL- SET BASE LIGHT OAK	In	LANDSCAPING	32	/ /	07/30/98	08/03/98	1253.00	1559.47	28.40
19	DAUGHTERS A.	SPRAY POND AREAS FOR WEEDS	In	CLEAN UP	30	/ /	/ /	08/03/98	800.00	1077.50	0.00
7	BECO INT.	REPLACE MULCH IN PLAY AREAS	In	LANDSCAPING	32	/ /	/ /	08/11/98	204.40	275.41	2.40
12	ABERCROMBIE, KRISTY:FA	POT WATERING SYSTEM	In	IRRIGATION	21	/ /	/ /	08/11/98	161.00	216.85	3.50
12	ABERCROMBIE, KRISTY:FA	DRAINAGE IN BACK YARD,POTS	In	LANDSCAPING	32	/ /	/ /	08/11/98	110.70	142.49	1.45
21	MOORE DR.	CHANGE BACK FLOW PREVENTER TO	In	IRRIGATION	21	/ /	/ /	08/12/98	52.50	70.72	1.00
2	TRUSSO	TOPSOIL AROUND THE WATER	In	LANDSCAPING	32	/ /	/ /	08/12/98	30.10	40.55	0.50
14	CLARK J.	ANNUAL FLOWERS	In	CONSTRUCTIO	30	08/25/98	/ /	08/26/98	287.61	381.44	3.37
11	ABERCROMBIE, KRISTY	ANNUAL FLOWERS	Scheduled	CONSTRUCTIO	30	/ /	/ /	08/26/98	363.29	506.43	3.83
3	JENGO M.	YUCCA FOR PARKING LOT	In	CLEANING	30	/ /	/ /	08/26/98	36.80	43.10	0.52
20	DAWSON	CLEAN ALL PILES ALONG WALL @	In	CLEANING	60	08/27/98	/ /	08/31/98	1501.50	1576.58	0.00
7	BECO INT.	ENTRY ISLAND KNOLL CREEK @	In	IRRIGATION	21	08/15/98	/ /	09/01/98	1046.00	1184.39	19.00
7	BECO INT.	TURF BUBBLER SYSTEM TO ISLAND	In	IRRIGATION	21	/ /	/ /	09/01/98	649.50	807.80	15.00
22	ELLICOTT OAKS	DRAINAGE FROM FRONT SIDEWALK	In	LANDSCAPING	21	08/19/98	/ /	09/01/98	195.91	264.08	3.95
1	INTERNAL OFFICE USE	COMPOST FOR TOP DRESSING	In	LANDSCAPING	32	/ /	/ /	09/01/98	34.30	46.20	0.50
7	BECO INT.	TURF BUBBLER SYSTEM TO ISLAND	In	IRRIGATION	21	/ /	/ /	09/01/98	736.10	915.51	17.00
5	VALONE S.	TRIM TREES AT MODEL HOME P.O.	In	SUBCONTRAC	60	/ /	/ /	09/01/98	245.00	301.69	0.00
13	CHLADNEY	LANDSCAPE AFTER SIDEWALK	In	CLEANING	32	/ /	/ /	09/03/98	2384.97	3184.96	25.19
24	ABERCROMBIE, KRISTY:RE	DRAINAGE AROUND HOUSE	Scheduled	DRAINAGE	32	/ /	/ /	09/04/98	1107.50	1426.88	25.00
9	BODANI P.	TREE BARRIER TO PROTECT BACK	Scheduled	LANDSCAPING	21	09/03/98	/ /	09/08/98	464.24	546.51	10.00
8	HOUSE OF SHOPS	CLEAR LOT 81 BRUSH & TRASH	In	CLEANING	32	/ /	/ /	09/10/98	1995.00	2149.61	57.00
23	ERICKSON J.	DRAINAGE AROUND HOUSE	Scheduled	LANDSCAPING	30	08/19/98	/ /	09/19/98	377.84	475.47	5.10
26	COOK, BRIAN	REMOVE PRIVITS FROM SIDE OF	Scheduled	LANDSCAPING	30	/ /	/ /	09/19/98	35.00	37.71	1.00
27	FEDERAL EXPRESS	TREE BARRIER TO PROTECT FRONT	Scheduled	CONSTRUCTIO	21	/ /	/ /	09/19/98	429.24	508.80	9.00

317.72



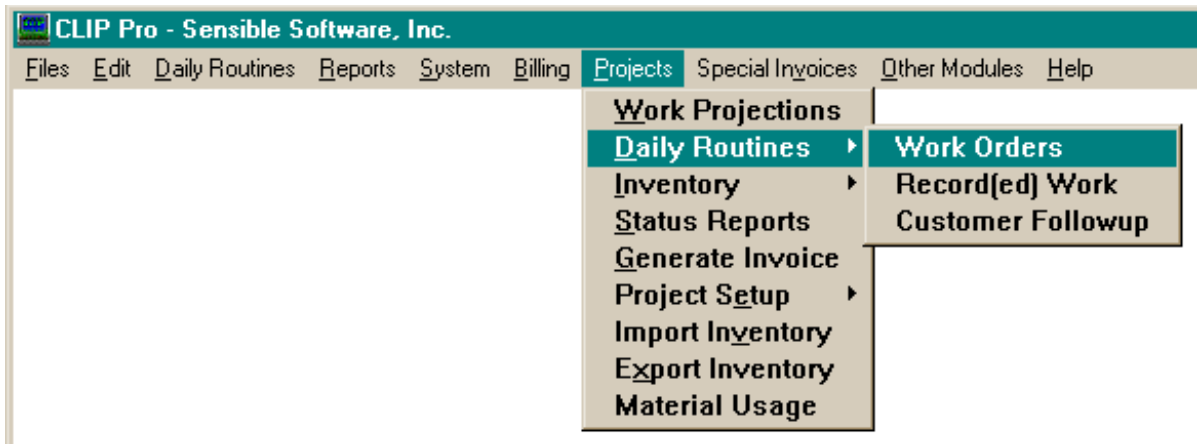
## Daily Routines

Now that you have made a bid and received approval we must now continue on and get the work done.

The daily routine steps are as follows:

1. Set up the project work orders for you crews
2. Print the project work orders out
3. Send the crews out
4. Setup the Project bank
5. Add projects into the Project bank
6. Recording the work
7. Post the work to history
8. During the process check and evaluate the progress
9. Post history to journal
10. Print bills

### 1. Set up the project work orders for your crews.



Select the status, date range for the projects you wish to choose from. By selecting the "project type" check box you can add the additional sorting option of project type. You can select the whole project or individual inventory items from each project that you will be using that day. To select individual items use the check box "Choose Individual Project Items". It is recommend you do not use this function when you are first learning. It can get very confusing of which items you have added. You also can edit the work order header this screen.





Project - Work Orders

**Project - Work Orders**

Status Type: **Scheduled** 01/01/90 Thru 12/30/03

Project Type **LANDSCAPING**

**Header Design Options:**

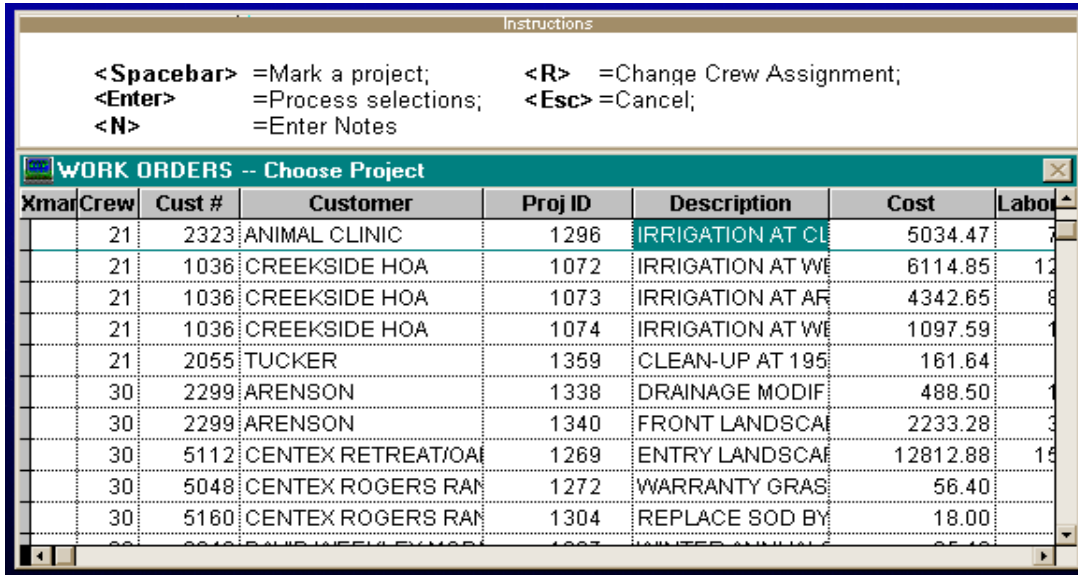
Summary  
 Detail

Choose Individual Project/Items

After hitting the "Continue" Button you are shown a list of projects that meet the sorted criteria. Select the projects you wish to print work orders for by using the spaces bar to tag them. Hit "enter".

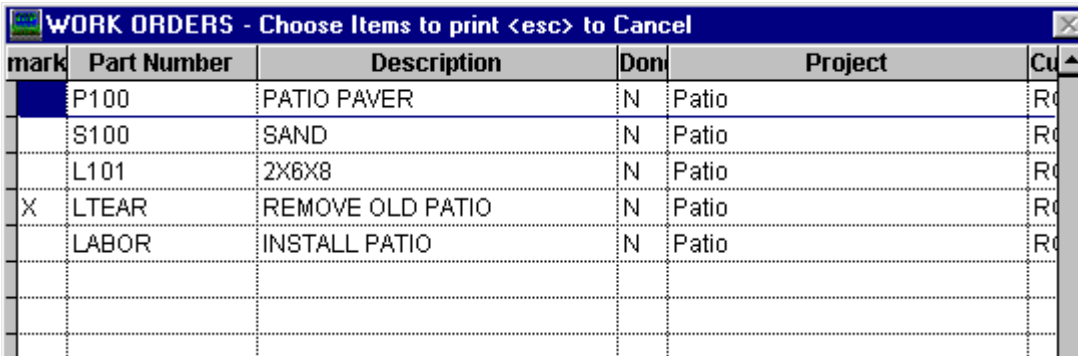
# Projects/Bidding/Estimating

//////////////////////////////////////CLIPPO//////////////////////////////////////

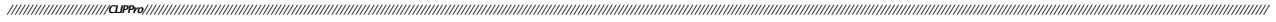


If you selected the option for individual project items you will be prompted to select the individual items for printing. Use the space bar to tag the items and the Enter key to process.

**NOTE: It is recommended while learning the program not use the "Choose Individual Project/Items feature.**

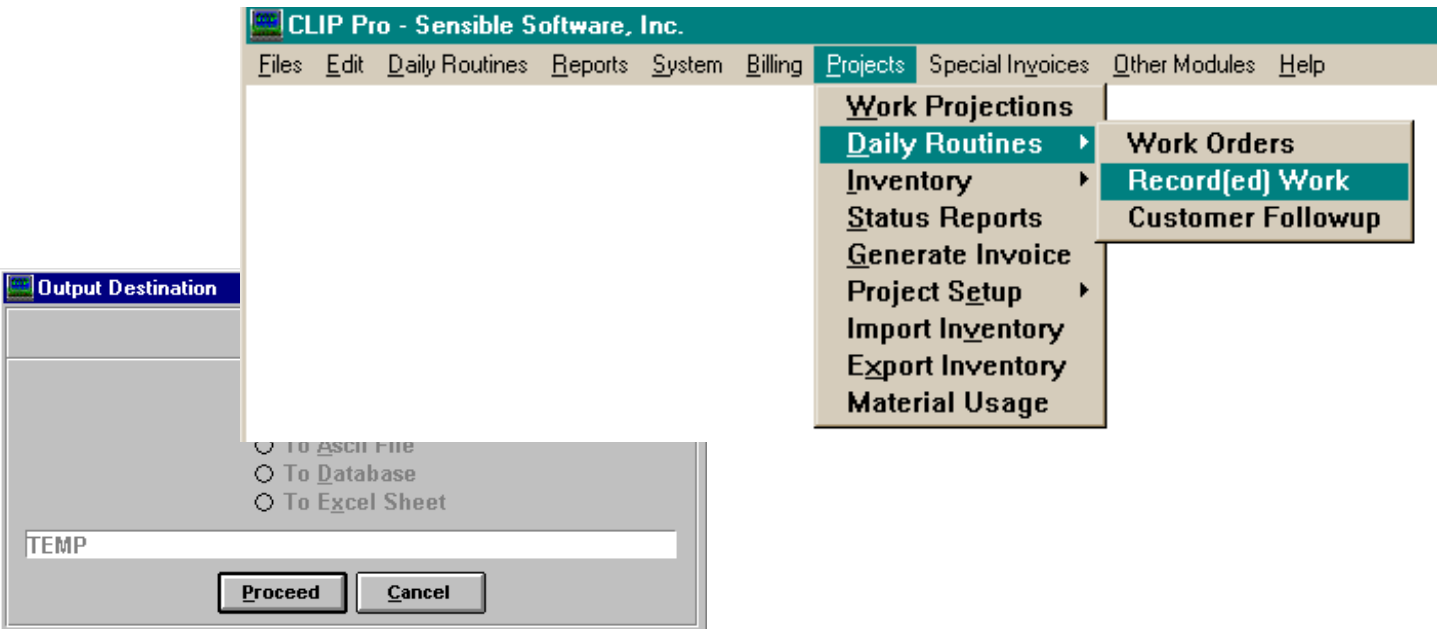


2. After selecting you will can send it to the printer or to the screen

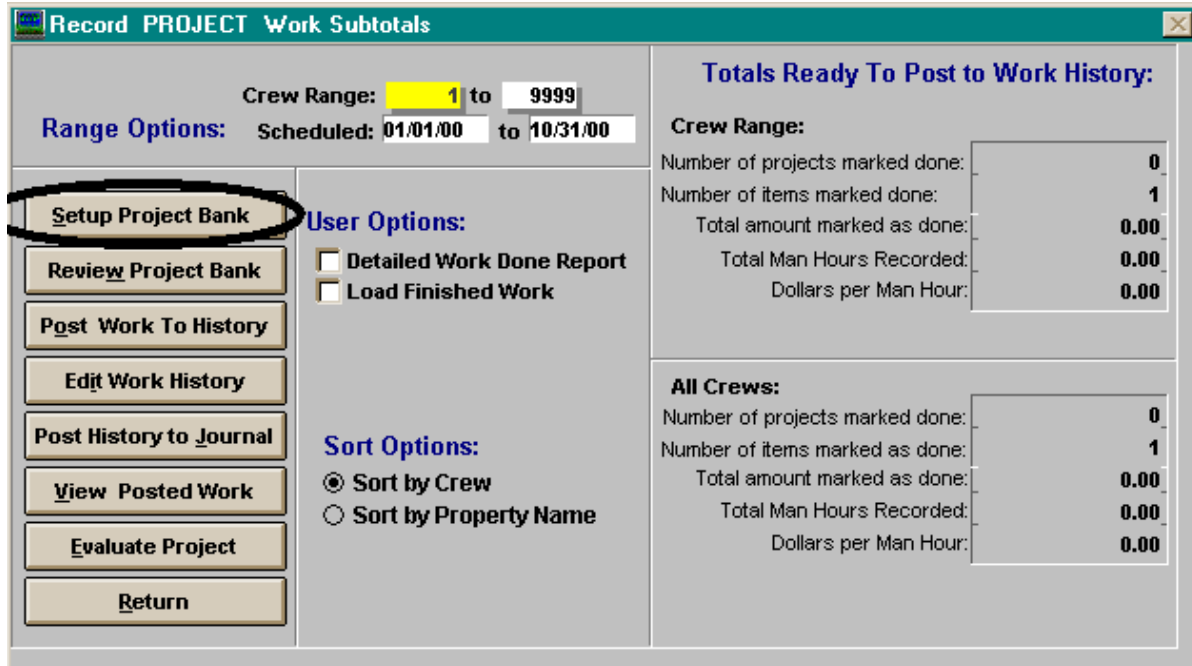


3. Send your crew out with the work order

4. Setting Up The Project Bank



//////////////////////////////////////



#### 4. Set up project bank:

The project bank in Projects is different than that of the regular work bank that you are used to. The loaded project bank can be viewed from the “Review Work Bank” button. The project bank allows you to easily find only the inventory items you are using by being able to scroll through them when recording work. This saves you the time of looking through a possible long list of items you have.

#### Overview on the Record Work Screen

Record PROJECT Work Subtotals

Crew Range:  to

Range Options: Scheduled:  to

**Setup Project Bank** 1

**Review Project Bank** 2

**Post Work To History** 3

**Edit Work History** 4

**Post History to Journal** 5

**View Posted Work** 6

**Evaluate Project** 7

**Return**

**User Options:**

Detailed Work Done Report

Load Finished Work

**Sort Options:**

Sort by Crew

Sort by Property Name

**Totals Ready To Post to Work History:**

**Crew Range:**

Number of projects marked done:	0
Number of items marked done:	0
Total amount marked as done:	0.00
Total Man Hours Recorded:	0.00
Dollars per Man Hour:	0.00

**All Crews:**

Number of projects marked done:	0
Number of items marked as done:	0
Total amount marked as done:	0.00
Total Man Hours Recorded:	0.00
Dollars per Man Hour:	0.00

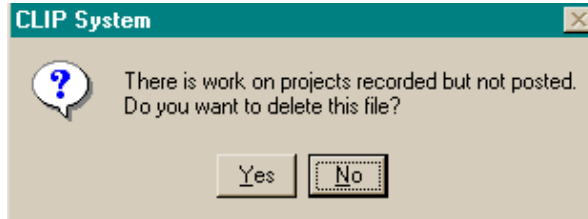
1. **Setup Project Bank:** Allows you to add items to the work bank. Projects can be partially loaded or all items can be loaded. **All work is recorded through this button.**
2. **Review Project Bank:** Allows to view what you have recorded so far but not posted yet. This is where you can view to project bank.
3. **Post Work to History:** After you record work you will want to post it to the projects history so that when you print out new work orders the quantities used will be updated.
4. **Edit Work History:** Allows you to make adjustments to the recorded work before you post it to the journal and becomes part of the customer's history.
5. **Post History to Journal:** Puts items form the project history into the customer's history (journal) and actually charges it to their account. You may choose to post all the items at one time or parts at a time. The Invoice module will allow you to select the items to bill. If you do not have the Invoice module only post items that you want to bill as what you post will be show on their monthly bill.
6. **View Posted Work:** Allows you to check the history of various projects.

////////////////////////////////////CLIPPro////////////////////////////////////

**7. Evaluate Project:** Allows to you to select a project and review details on it.

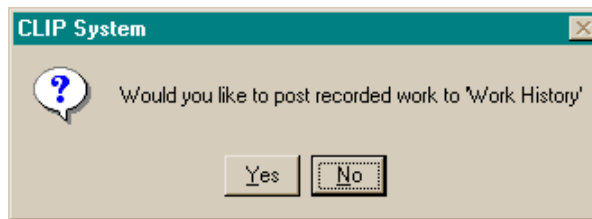
Each time you "Setup Project Bank" you will prompted with two questions.

1.



Normally answer **"No"** to this. Answering Yes deletes the work bank and all the items that are loaded. There are few cases that you want to delete it all and start over.

2.



Normally answer **"Yes"** to this. This tells projects to take any work that you have recorded and post it to the history file. This is necessary to give up to date work orders should you choose to update and print them on a daily bases. Even if nothing has been recorded hitting Yes will not hurt anything. You will just be told that there was nothing to record.

## 5. Add projects into the Project Bank

The first time you go in to the Setup Projects Bank or if have chosen to delete the Work Bank you will shown a list of projects that you can add. Choose the correct one and it will active the work bank.

After you have done this you can then use the "A"(Add) button to add additional projects into the project bank.

Use the "Enter" key to select the project.



## Projects/Bidding/Estimating

them. The method you use depends on the size of the project, how long it will take, how many changes are need to the actual quantities used, etc. You should experiment with both ways to see which will work best for you. You can decide to record the work done when the project is totally complete or on a daily bases. Projects can work either way.

### First Method:

Allows you to mark each item one at a time. Find the item that you want to record quantities for and hit the Enter key. You will be brought to the following screen.

**Note:** If you have times assigned with each inventory item is very difficult to use this method to record work because it is impossible for your workers to keep track of times on every single item. ( i.e. 10 min to plant tree, 3 min to plant bush )

**Record Material Used**

Project: Flower Bed and Tree  
Customer: CRESS GEORGE

Part Number: ILE ATT1-30 itm# 29  
Description: Foster's Holly / 2 1/2-3"

Quantity Required: 1.0000  
Recorded to date: 1.00  
Used This Time: 0.00  
Date used: //

Foreperson: [Yellow Box]  
Crew #: 1  
Crew Members: 0

Start Time: : M  
Stop Time: : M

Man Hours This Time: 0.00  
Clock Hours This Time: 0.00  
Budgeted Labor Units: 0.000000

Amount to Bill: \$31.63  
Quantity to Bill: 1.00

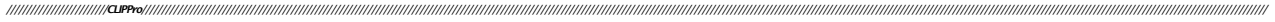
Done?

See Detail See History Save Adjust Bill Adjust ovhd Return

If the inventory does not have a stock type of "Time" you are prompted to fill in the Used This Time as well as hours, foreperson and # of crew members.

You normally will be recording the Start and Stop time as the same because you will be recording all the labor used under the Labor inventory item.

If this item has a stock type of "Time" you would not be able to get to the "Used This Time" but you can still override the "Man Hours This Time"



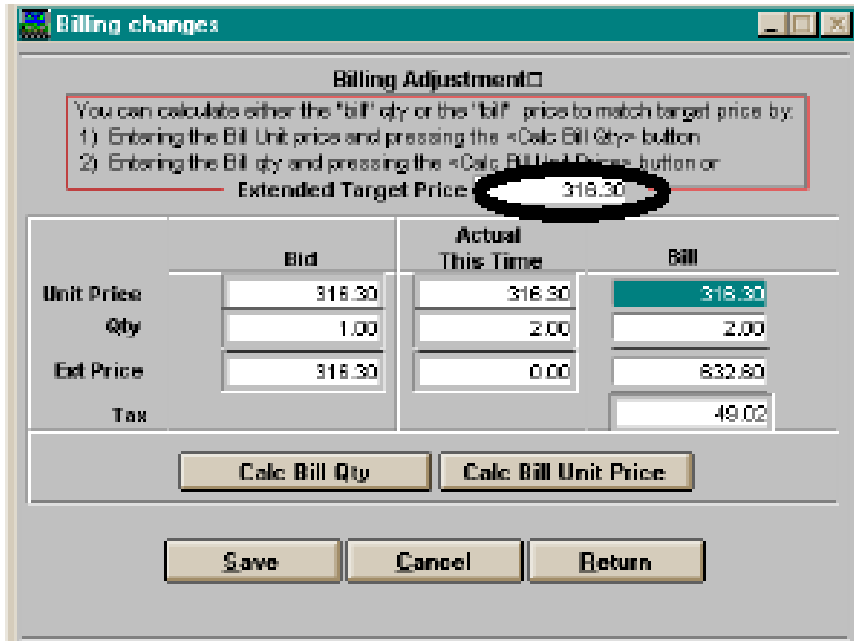
If this item is done and you will not be using anymore of it you can select the Finished button or Projects will prompt you when you Save.

**Note:** Do not lie to yourself. Enter the real quantities used.

**There are 5 possibilities that could happen with quantities used:**

1. You actually used the exact amount that you bid and the customers price is fine. Answer: In this case you only need to record the actual to equal the bid.
2. You used **more** of the item then bid but you **do not** want to charge the customer for the extra. Answer: Use the "Adjust Bill" button
3. You used **more** of the item and **do** want to charge the extra to the customer. Answer: Record the actual quantity and Save. You will told that the quantity does not match. Choose "yes" to save.
4. You used **less** of the item and **do not** want to change the customers price. Answer: Use the "Adjust Bill" button.
5. You used **less** of the item and **do** want to pass on the discount. Answer: Record the actual quantity and Save. You will told that the quantity does not match. Choose "yes" to save.

### Adjust Bill



Enter the "Extended Target Price" that you want to charge.

Change the Bill Qty to the number you want to bill. Select "Calc Bill Qty" and it will adjust the Unit Price to match the Unit Price x Qty=Ext Price

OR

Change the Bill Unit Price to the price you want to charge per unit. Select the "Calc Bill Unit Price" and it will figure out how many units you need to bill out to come up with the desired total.

Adjust Overhead

**Record Material Used**

Project: Flower Bed and Tree  
 Customer: CRESS GEORGE

Part Number: FAG GRA-25 itm# 30  
 Description: American Beech / 2-2 1/2"

Quantity Required: 1.0000  
 Recorded to date: 0.00  
 Used This Time: 0.00  
 Date used: 11/24/00

Foreperson:   
 Crew #: 1  
 Crew Members: 1

Start Time: 08:00 A M  
 Stop Time: : M

Man Hours This Time: 0.00  
 Clock Hours This Time: 0.00  
 Budgeted Labor Units: 0.000000

Amount to Bill: \$0.00  
 Quantity to Bill: 1.00

Done?

See Detail See History Save Adjust Bill **Adjust ovhd** Return

**Adjust Overhead Costs -- Does not affect billing price**

Part Number ILE ATT1-30  
 Description Foster's Holly / 2 1/2-3"

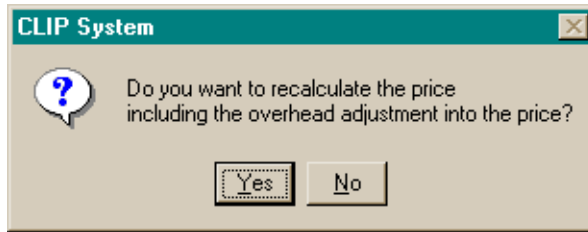
**Ovhd Adjustment Work Sheet**

	Cost	Units	%MarkUp	Qty	Ovhd Total	Ovhd Bid
Materials	25.00		10.00	1.0000	\$2.50	\$2.50
Labor						
Equip						
Subs						
<b>Total :</b>					<b>2.50</b>	<b>2.50</b>
<b>Actual Overhead Recorded:</b>					<b>10.00</b>	

Save Cancel Return

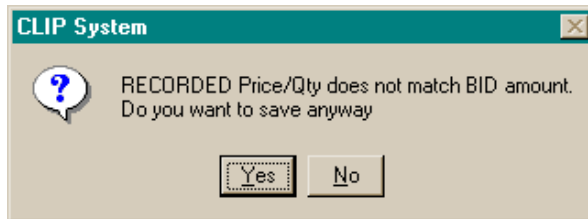
This function allows you to adjust overhead. Normally this is need when the quantity used is more then the quantity bid and you don't want to charge yourself the overhead associated with the extra items. If left unchanged your profit/loss report would show significantly less profit then the job really is.

Enter the quantity that you want to charge overhead on. When you select Return you will be prompted if you want to adjust the price to the customer.

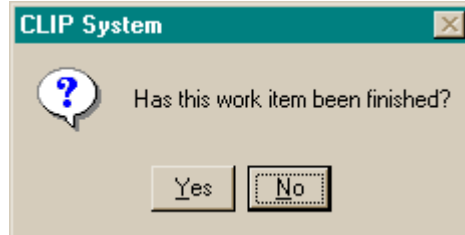


After recording the quantity or making any adjustments to the bill or overhead select "Save"

If the quantity does not match the Bid you will be prompted. This is normal if the item is not finished. Select Yes to save..



If the quantity does match the Bid you will be prompted. If you answer Yes the item Finished button will be automatically checked off.



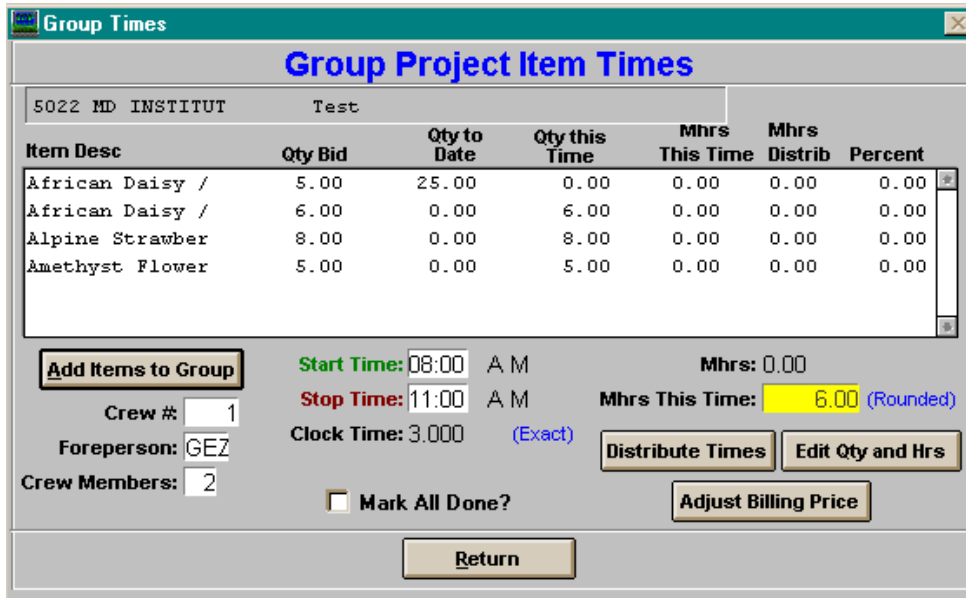
You now have two choices:

1. To add additional Projects/items into the project bank from the same project select "Return". To add other projects into the project bank select "Return" then "Escape" to view the list of other projects.

2. If an item has been added into the project bank anytime previously you can use the scroll buttons to get to the next item you need to record work for.

**If all the items have been marked as finished you will be prompted to**





Use the "Add Items to Group" to select the items you want to include

**Button Options:**

**Distribute Times:**

After entering the Start and Stop Times. Select the Distribute Times to proportionately spread the total time over all items that contain labor.

**Edit Qty and Hrs:**

Allows you to manually adjust time distributed times and change the quantities used that did not match the original bid

**Adjust Billing Price:**

Allows you to change the bill quantities and the pricing.

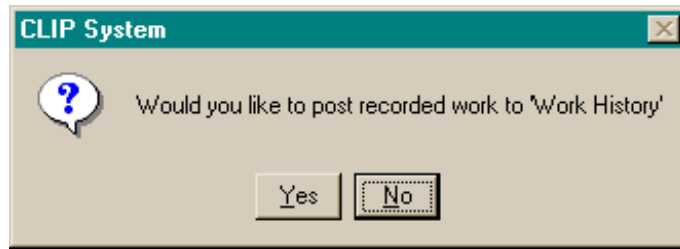
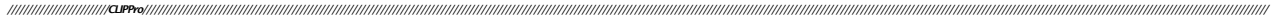
**7. Post the projects to history**

After recording all the new work you will want to post it to history. Posting to history will take today's recorded quantities and add them to what has been recorded before to give you a new accurate count. This will also update your "Profit/Loss" and "Evaluate Project" reports. New work orders can then be printed to reflect the updated information.

**Note:** Each day you record additional quantities for an item it creates a separate posting to the history. You will have an option when you select "Post History to Journal" to combine all like items together to prevent many line items of the same part on the bill.

You are able to view and modify items that have posted to history by using the "Edit Work History" button for the Main Record Work screen.

When you Return out of recording work you are automatically prompted to post work to history. You should answer "Yes"



**8. During the process check and evaluate the progress**

As you update the quantities you can print out accurate "Profit/Loss" and "Evaluate Project" reports. You can determine how much labor has been used so you can closely monitor possible overages.

**9. Posting History to Journal**

Items that are in Project history will stay there indefinitely until they are manually posted to the customers account for billing.

# Projects/Bidding/Estimating

//////////////////////////////////////

**Record PROJECT Work Subtotals**

Crew Range: 1 to 9999  
 Range Options: Scheduled: 01/01/00 to 11/24/00

**Setup Project Bank**  
 Review Project Bank  
 Post Work To History  
 Edit Work History  
**Post History to Journal**  
 View Posted Work  
 Evaluate Project  
 Return

**User Options:**  
 Detailed Work Done Report  
 Load Finished Work

**Sort Options:**  
 Sort by Crew  
 Sort by Property Name

**Totals Ready To Post to Work History:**  
 Crew Range:  
 Number of projects marked done: 0  
 Number of items marked done: 0  
 Total amount marked as done: 0.00  
 Total Man Hours Recorded: 0.00  
 Dollars per Man Hour: 0.00

**All Crews:**  
 Number of projects marked done: 0  
 Number of items marked as done: 0  
 Total amount marked as done: 0.00  
 Total Man Hours Recorded: 0.00  
 Dollars per Man Hour: 0.00

When you are done with a project or section of a project and want to send it over to the customers account for billing use the "Post History to Journal". You will be shown all the items that have been posted to the project history. Use the space bar to select the items you want to post.

Work to Post to Journal

<Space bar>=Choose Item to Post, <Enter>=Process Items Selected  
 <Esc>=Cancel,

**Choose Items to Post . - (Only shows items that have not been posted to Journal.)**

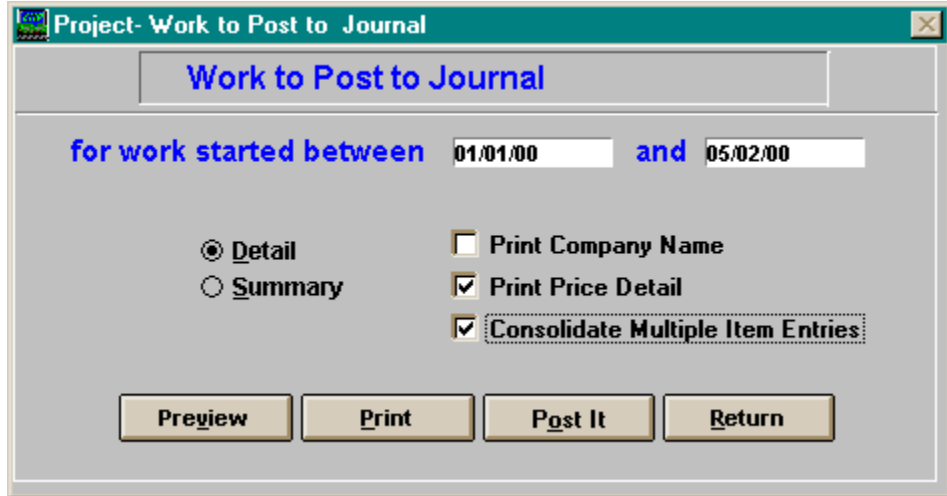
Mark	Description	Recorded	Proj ID#	Project	Cust No	Customer
	BIOBARRIER 19" DE	01/24/00	1280	ROOT BARRIER 2 TF	7078	FINLEY, D
	IRRIGATION PERMIT	01/14/00	1312	IRRIGATION	2303	SCHWERN
	BACKFLOW PREVE	01/14/00	1312	IRRIGATION	2303	SCHWERN
	CONTROLLER IRRIT	01/14/00	1312	IRRIGATION	2303	SCHWERN
	GLEN HILTON "FREE	01/14/00	1312	IRRIGATION	2303	SCHWERN
	GLEN HILTON "MINI	01/14/00	1312	IRRIGATION	2303	SCHWERN
	IRRITROL 205TS 1" \	01/14/00	1312	IRRIGATION	2303	SCHWERN
	ROTOR RAINBIRD R	01/14/00	1312	IRRIGATION	2303	SCHWERN
	DL-2000 TORO DRIP	01/14/00	1312	IRRIGATION	2303	SCHWERN
	BACKFLOW DEVICE	01/14/00	1312	IRRIGATION	2303	SCHWERN
	IRRIGATION -MISCE	01/14/00	1312	IRRIGATION	2303	SCHWERN
	CLEANUP	01/12/00	1343	EMERGENCY CLEA	5012	CENTEX C
	PANSY	01/12/00	1343	EMERGENCY CLEA	5012	CENTEX C
	LANTANA - TRAILING	01/12/00	1343	EMERGENCY CLEA	5012	CENTEX C

After selecting you can post it by hitting the "Enter" key.

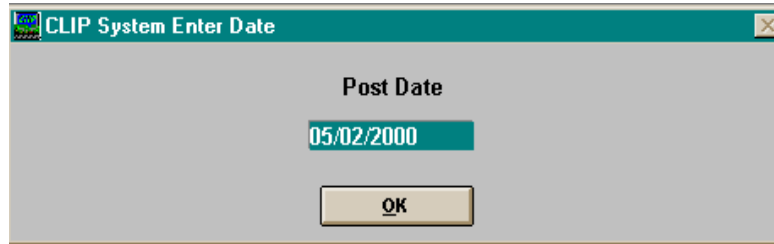
Because each time you a record an item it creates a separate journal entry line you will probably want to use the "Consolidate Multiple Item Entries" option so that all of one item is billed at one time.

Select Post It

////////////////////////////////////CLIPPro////////////////////////////////////

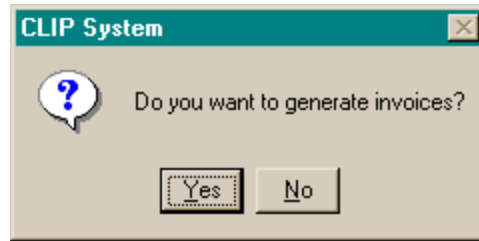


Verify the posting date.



**10. Print Bills**

If this is an Invoice type customer you will be prompted if you want to generate an invoice. If you choose no you can still generate an invoice from either within the customers File Maintenance screen or from the Generate Invoice option on the Projects menu pull down. See the Invoice Manual for further instructions.



If this a balance forward type customer the posted work will go to the customers history. The project name will be shown with the dollar amount. The items will appear as notes under this.

Seq. #	Date	Amount	Code	Description
67	12/27/99	0.00	Balance	New Balance
68	12/27/99	0.00	Current	
* 69	05/02/00	161.00	Debit	EMERGENCY CLEANUP
* 70	05/02/00	0.00	Note	PANSY
* 71	05/02/00	0.00	Note	CLEANUP
* 72	05/02/00	0.00	Note	LANTANA - TRAILING PURPLE

Return

### Importing inventory from Excel

You can import your inventory if you can get the list into Excel. Ask your supplier for this list. This could save you many hours of data entry.

Make a backup before attempting the import. If you are importing multiple lists make a backup after each successful import otherwise you may have to start from scratch. You should import one Vendor at a time because you can only assign one vendor per import session

Open your inventory list in Excel.

////////////////////////////////////CLIPPO////////////////////////////////////

Go through the spread sheet to see what is provided. Find the following columns that correspond to the items below. All additional columns must be erased for the import.

Arrange the data into the following columns in the exact same order as shown

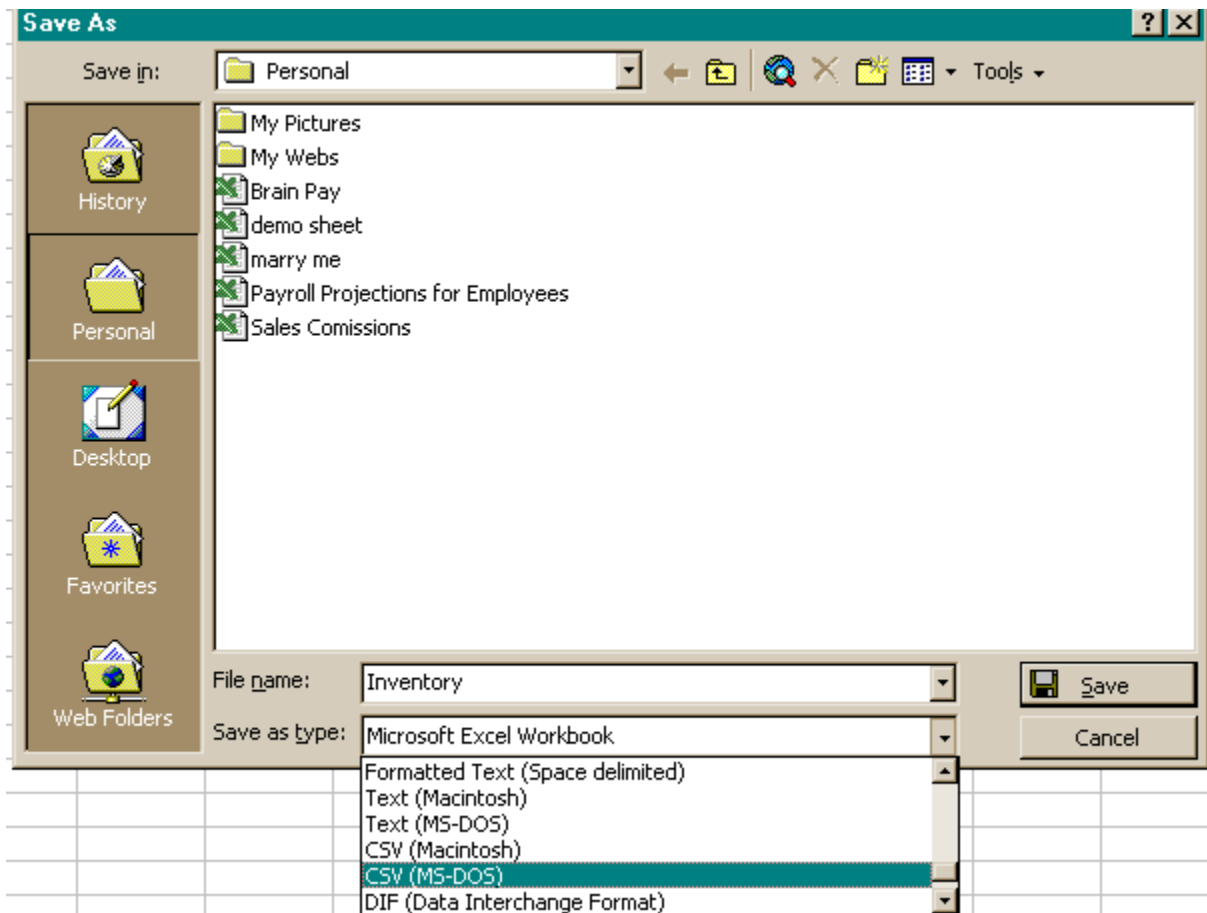
**Class Botanical Name Description Part Number Cost Unit Size**

**\*\*\*\*\* IMPORTANT NOTES:**

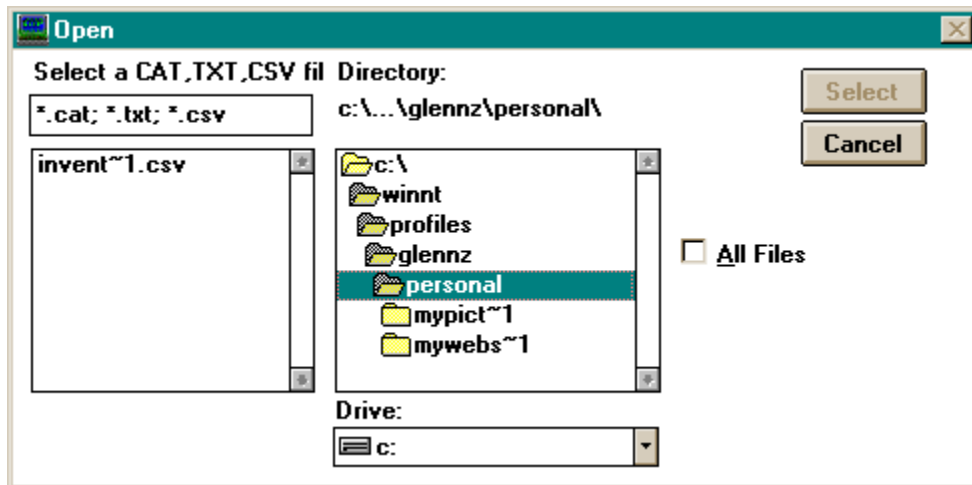
1. You must have a Part Number filled in
2. You must have a Description filled in
3. You cannot have \$ signs in the Cost column
4. You must remove the column heading names before importing
5. You must have column for all the above items even if some of the non required fields are left blank
6. You cannot have any quotes or commas in the fields. Quotations are commonly used for inches. In Excel you can use the Find and Replace command to eliminate these if they are present

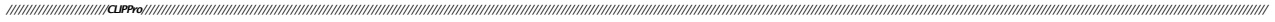
Getting an Error 43 on importing indicates that something is wrong with the data setup

Use the "Save As" in excel and save it as a .csv type of file. You can name it anything you like.

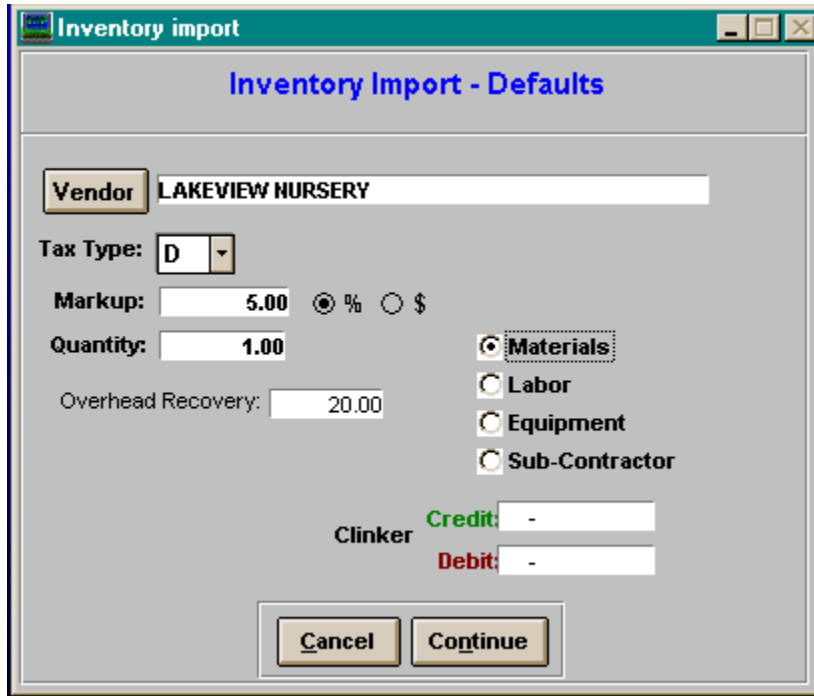


Go into Projects/Bid Right and select the Projects/Import Inventory. Find the file you just made.





Select the defaults that you want.



Select Continue. The inventory will now be added. You can run the import as often as you like. It will only add new items to the list.

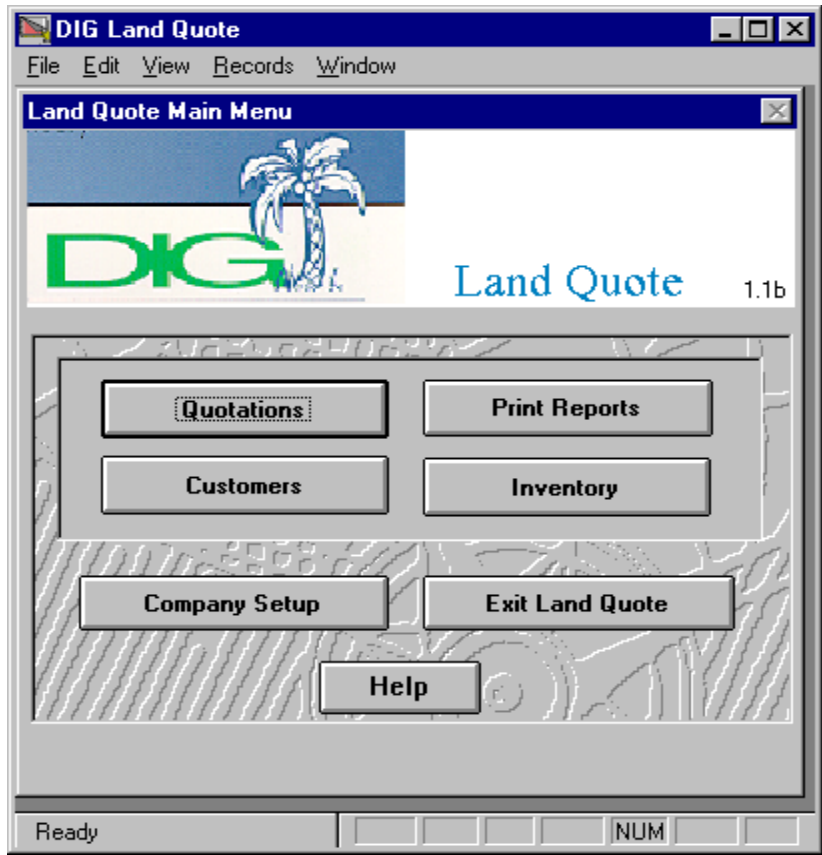
### Working with DIG (Design Imaging Group)

#### Importing the Inventory list from DIG.

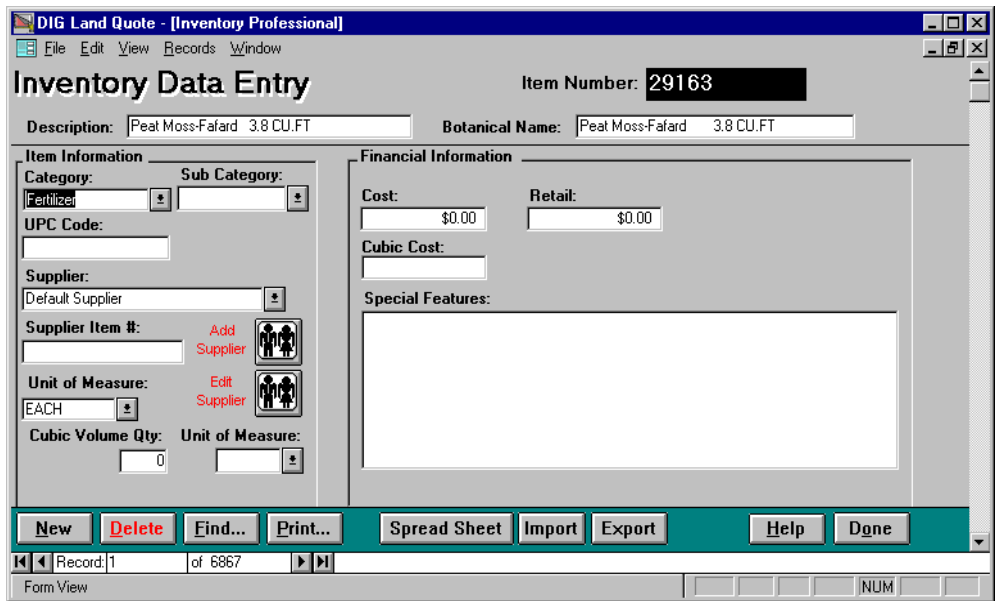
A quick way to start your inventory is to use the inventory already in LandQuote. You can export their inventory by Starting LandQuote

Press the Inventory button

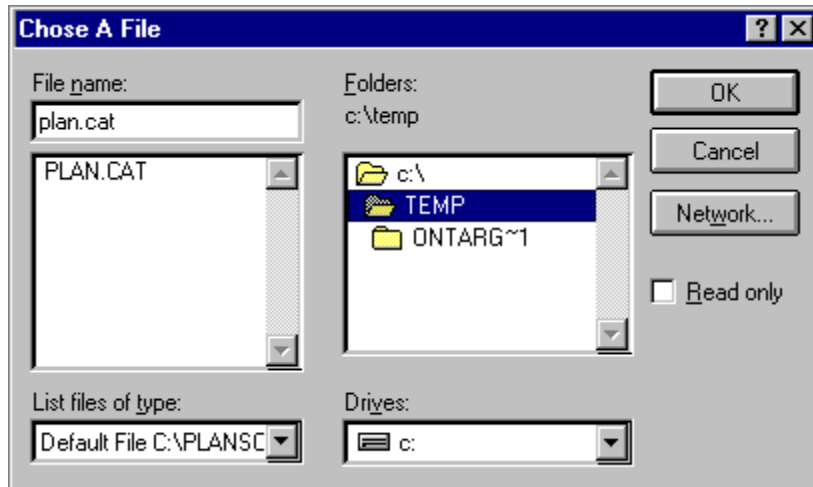
//////////////////////////////////////CLIPPO//////////////////////////////////////



Press the "Export" button



////////////////////////////////////CLIPPro////////////////////////////////////



Choose a temporary directory. We suggest you have a C:\TEMP for these types of uses.

Enter a new name for the file or just accept the default of "PLAN.CAT".

When the export is done, you will be returned to the inventory item screen.

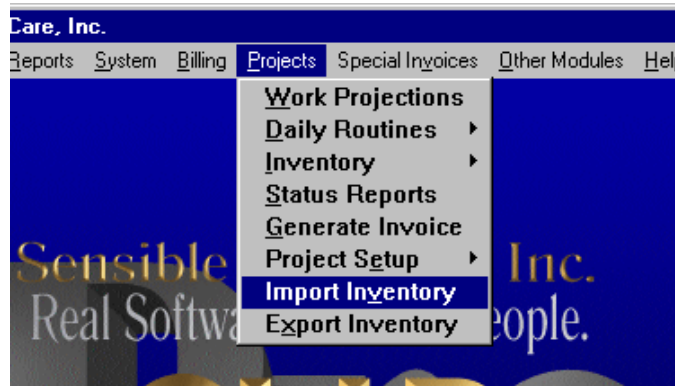
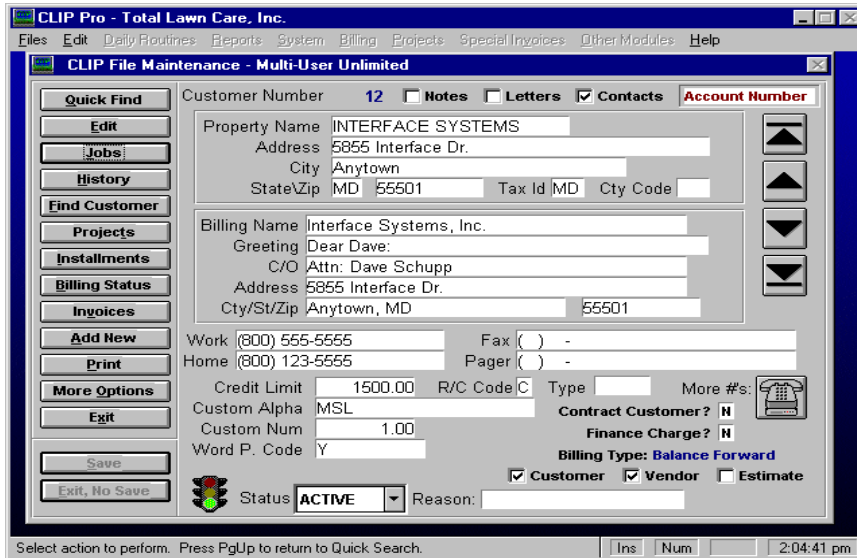
Exit LandQuote.

Start up **CLIP** and go to the File Maintenance function and enter at least one of your Vendors (a nursery, Home Depot or some other vendor.)

Make sure that the "Vendor" option is clicked on the lower part of the screen.

# Projects/Bidding/Estimating

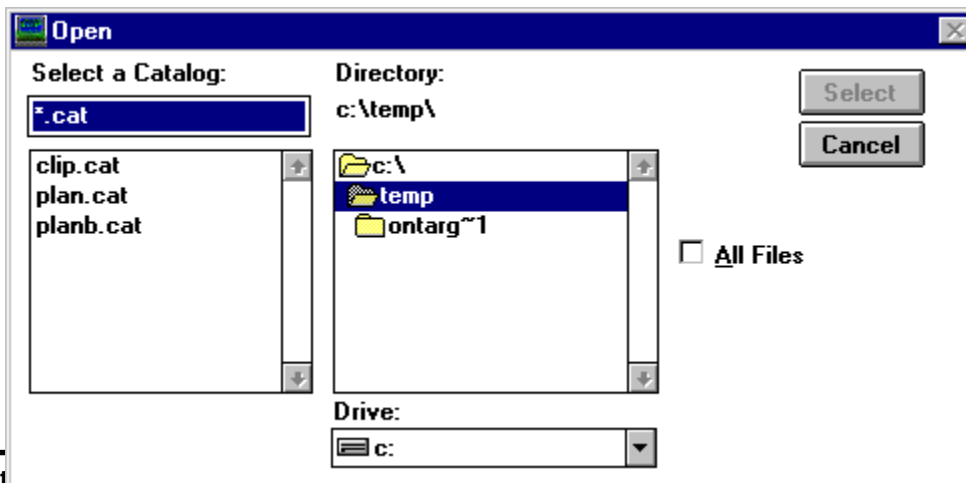
//////////////////////////////////////CLIPPro//////////////////////////////////////



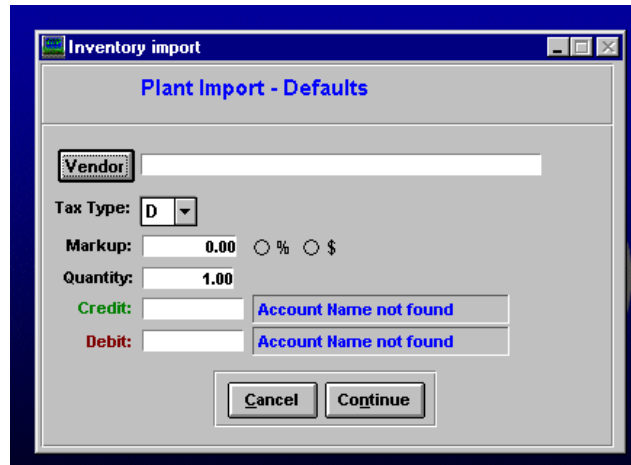
Now go back to the Projects Menu and choose the "Import Inventory" function.

Choose "Import Inventory"

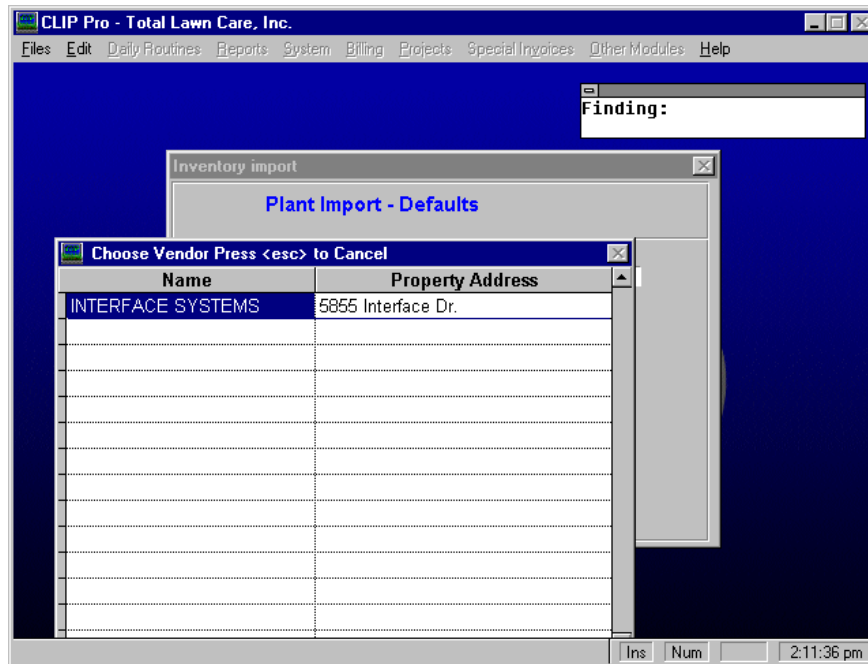
Find the catalog that you Exported from Land Quote. Ours is in the C:\TEMP directory



Select the catalog that you exported and press the “Select” button.

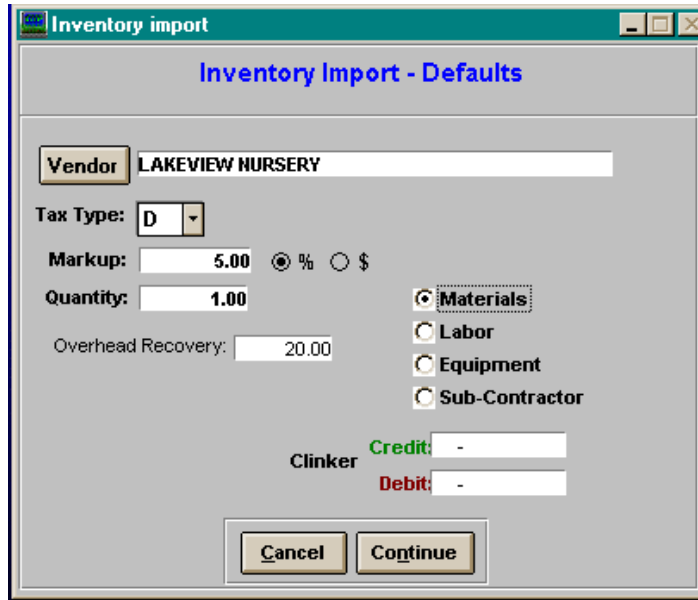


Now you will enter the defaults to be used with the new inventory. Press the Vendor button to see the vendors that you have set up in **CLIP**.



Press Enter on the one you wish to select. This will be the Vendor that will be assigned to all the new items imported into your **CLIP** system.

Enter the default Tax Code, the default mark up amount and method (either percentage or a straight mark up), the default quantities and the default credit and debit codes if you are using either CLINKER or QBLINK.



The tax type of “D” means no taxes added to this item, the tax type of “L” means add tax at the “Labor Rate”, the “M” tax type means tax at the “Materials Rate”. (For more information on Tax Types see the *CLIP* manual.)

The markup is your standard mark up over cost. Enter a number and then click on either the “%” radio button or the “\$” one. If you enter a 10 and click on the “%” radio button, the default markup will be 10% over cost. If you enter a 10 and press the “\$” radio button each item will be marked up by \$10.00. The most common way to use this in the import function is to mark it up by “%”.

The quantity is the default quantity that you want these new items to have. The safest bet is to place a 1 in this field. If you know that most of the time you will be using 5 of these items you can enter a 5. You can also change this after the import is done.

If you are using either QBLINK or CLINKER, you will enter a credit and debit account number for these items. As you can see we defaulted it to Sales Construction and Accounts Receivable.

These are just the defaults for the new items that will be imported. You can go through them afterward and change any of these fields for the occasional exception.

If you press the “Cancel” button, you will be returned to the menu.

If you press the “Continue” button, *CLIP* will import the items from the LandQuote catalog into your *CLIP* inventory.

This process can be time consuming the first time you run it. If there are 6,800 records, it could take up to 15-30 minutes on a fast machine. Since *CLIP* only imports records that do not already exist in your inventory file, the next time you run this, it would go a lot faster.

////////////////////////////////////CLIPPro////////////////////////////////////

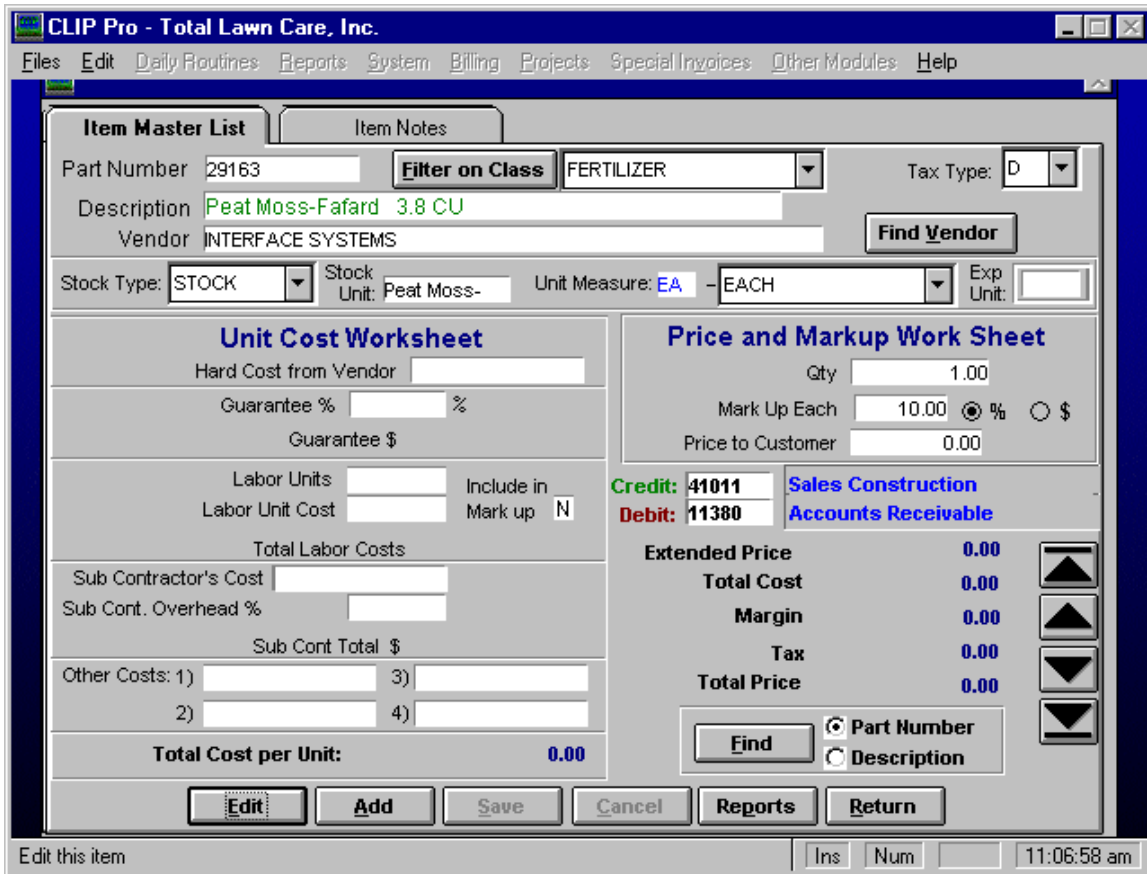


NOTE: When importing, you can import over and over again and **CLIP** will not import the same item twice. This allows you to import, not only the LandQuote inventory but other inventories that you might find from other programs or from other **CLIP** users.

Once you get to this step, you have successfully imported your inventory into **CLIP**. You can look at the inventory by going to the projects menu and choosing Inventory/Inventory Data Entry.



////////////////////////////////////



You can now see how our defaults were placed in the file. The default vendor is Interface Systems. The default quantity is 1, the default mark up is 10%. Since this part had no amount in LandQuote, no cost has been entered in. You can now edit the fields to make this a customized inventory for your company.

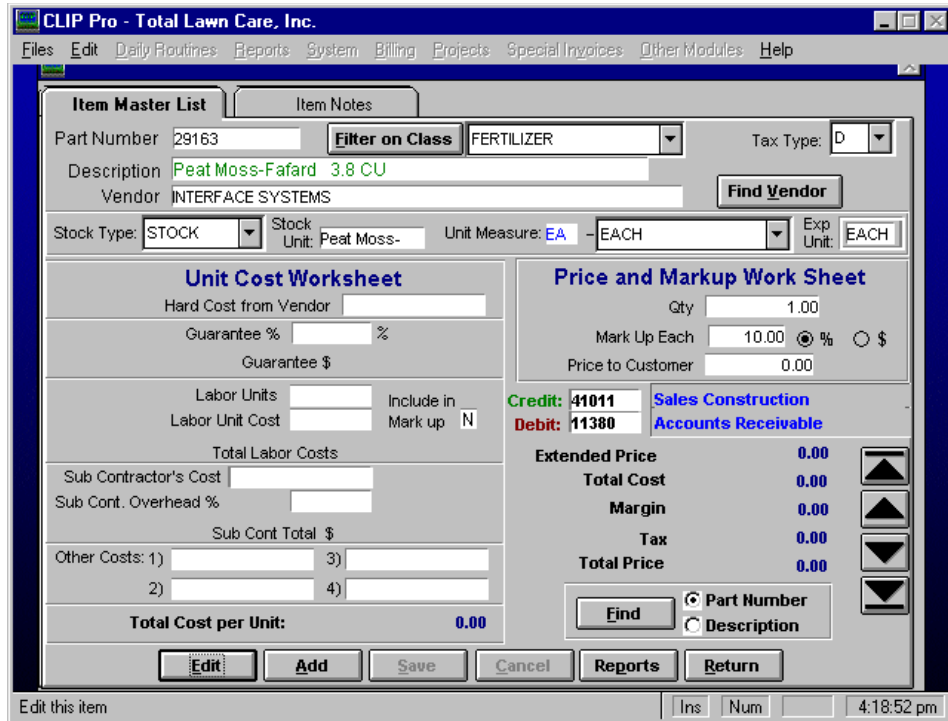
### Exporting your CLIP Inventory to PlanScape

When you have imported your inventory into **CLIP** and changed it according to your needs, you can then export it to be used with **PlanScape**.

**PlanScape** uses a Catalog file that ties into the symbols that are placed on the plan. By exporting **CLIP's** inventory to a catalog, you can use **PlanScape** with **CLIP's** catalog. As you draw the plan and drop symbols that are related to part numbers in **CLIP's** inventory, **PlanScape** will keep track of how many of what items you are using and will be able to export this materials list to a QTU file. You can then go back into **CLIP**, create a new project for a customer and import the qtu file and a project will be assembled automatically from your drawing in **PlanScape**.

#### Step 1 – Export your inventory from CLIP to a catalog file

Clip will only export items that have an "Export Unit" filled in



If you leave this field blank, **CLIP** will not export this item. This is handy if you want to limit the amount of items in the catalog to be used with **PlanScape**. Make sure that you only place unit measures that are acceptable to **PlanScape** in this field. If you enter unacceptable unit measures, **PlanScape** will give you a General Protection Fault. The acceptable measurements as of this writing are:

- “EACH”      “EACH”
- “SQUARE INCH”      “SQIN”
- “SQUARE FOOT”      “SQFT”
- “SQUARE YARD”      “SQYD”
- “SQUARE CENTIMETER”      “SQCM”
- “SQUARE METER”      “SQMT”
- “LINEAR INCH”      “LNIN”
- “LINEAR FOOT”      “LNFT”
- “LINEAR YARD”      “LNYD”
- “LINEAR CENTIMETER”      “LNCM”
- “LINEAR METER”      “LNMT”

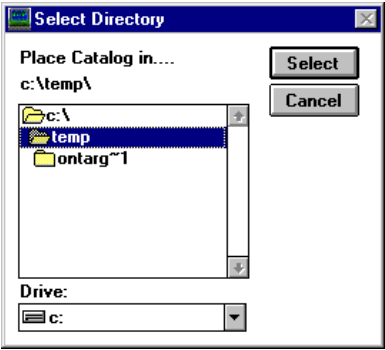
Now Export your inventory to a catalog. Use the Projects/Export Inventory option off of **CLIP**'s Main Menu

# Projects/Bidding/Estimating

////////////////////////////////////CLIPPro////////////////////////////////////



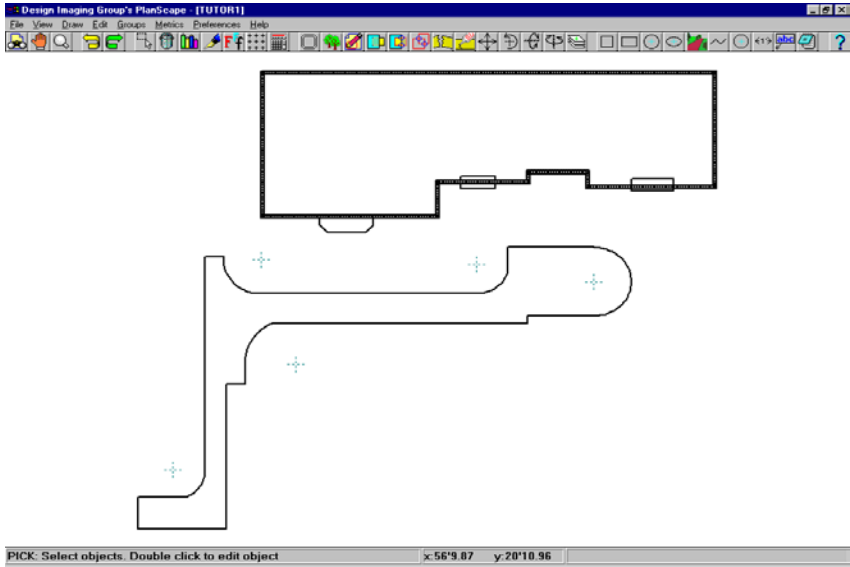
You will now choose a directory to drop the new catalog into. We use C:\TEMP for this.



Press the Select button and **CLIP** will export the inventory to a catalog in the directory you chose. It will be named **CLIP.CAT**.

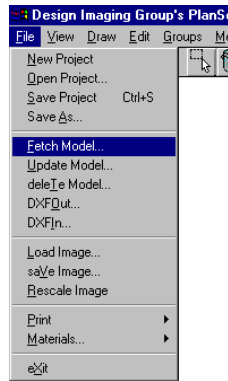
## Step 2- Relate the symbols to the catalog items

Start up Planscape and open your drawing

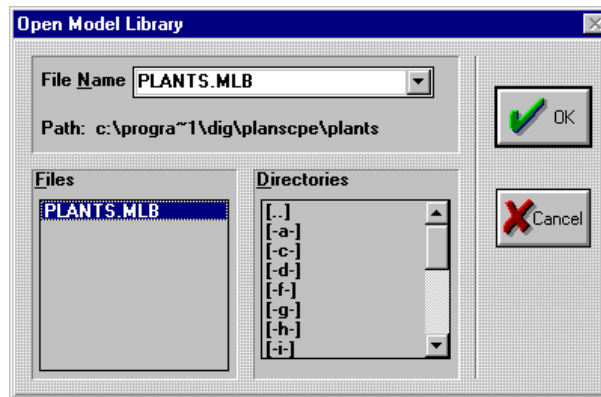




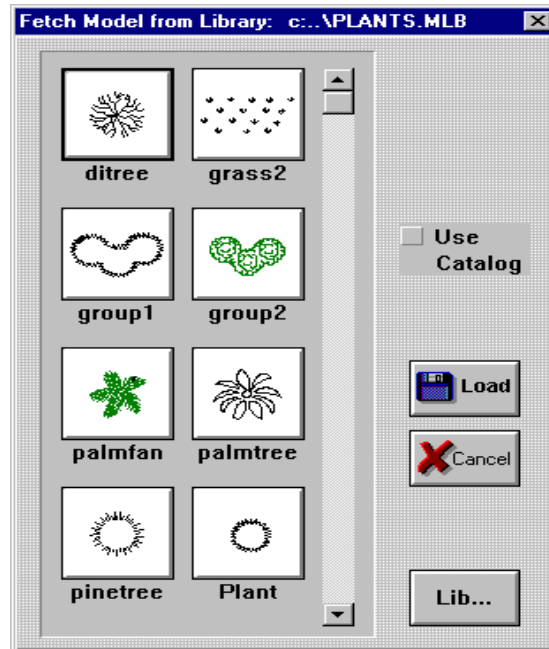
Pull down the File Menu and choose the “Fetch Model” menu choice.



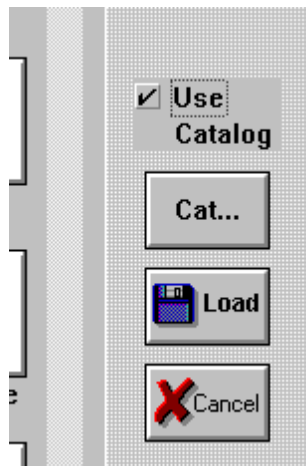
Choose the Plant Model



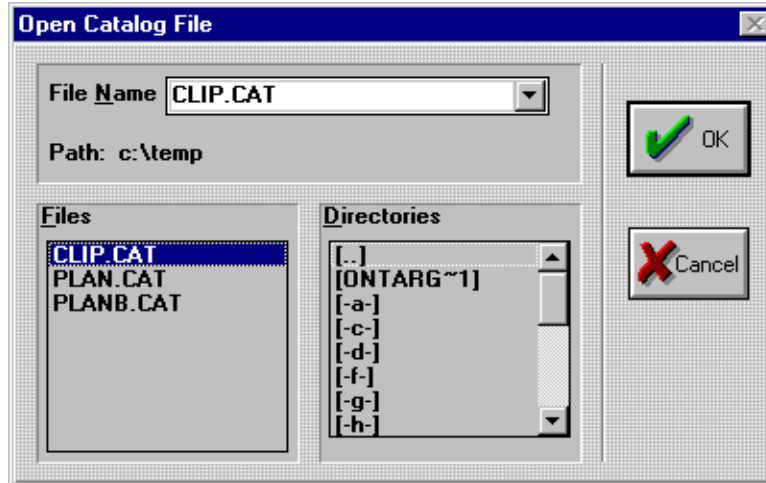
Now you will see the Plant symbols.



Click on the "Use Catalog" check box

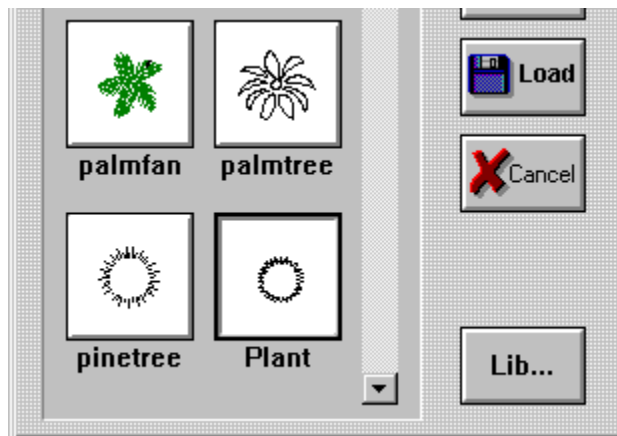


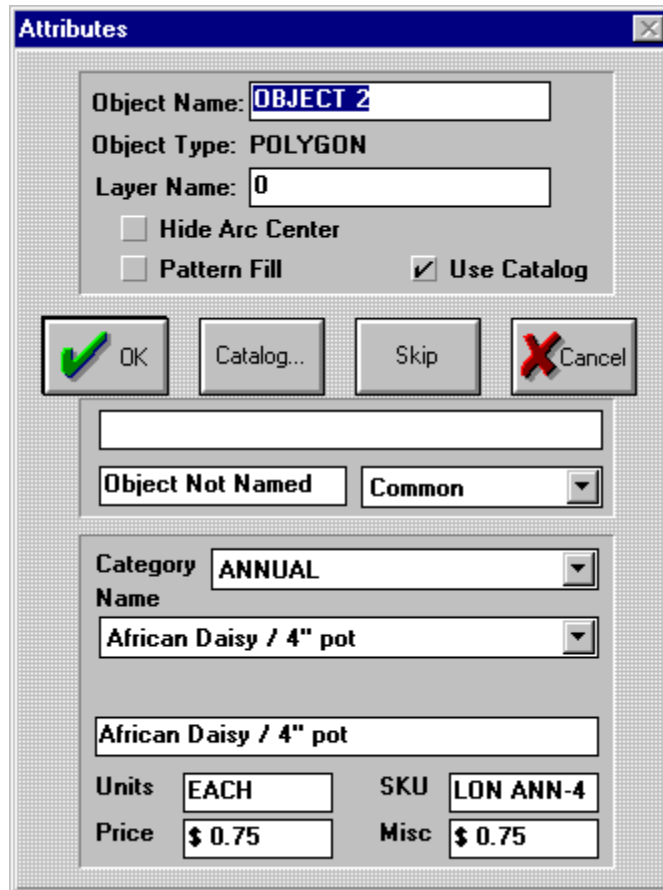
Press the Cat.... Button and choose the *CLIP.CAT* that *CLIP* created when it exported the inventory.



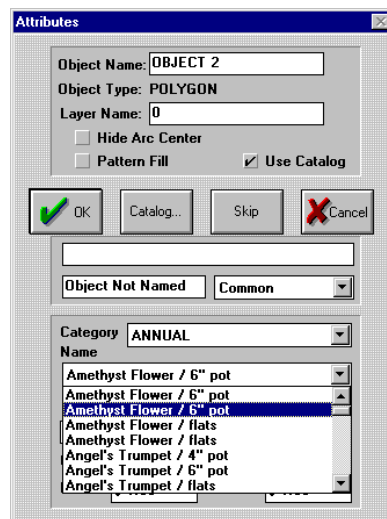
Now choose a symbol that you will use on your drawing. We will use the "plant" symbol.

Press the "Load" button





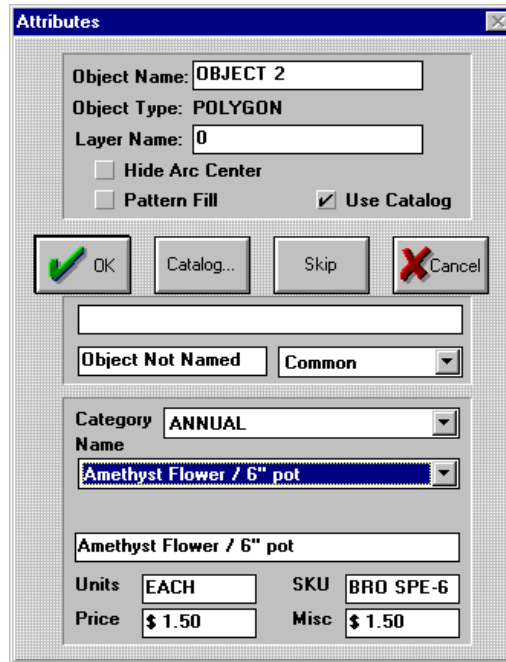
Choose the inventory you want it related to by pulling down the category and the name pull downs



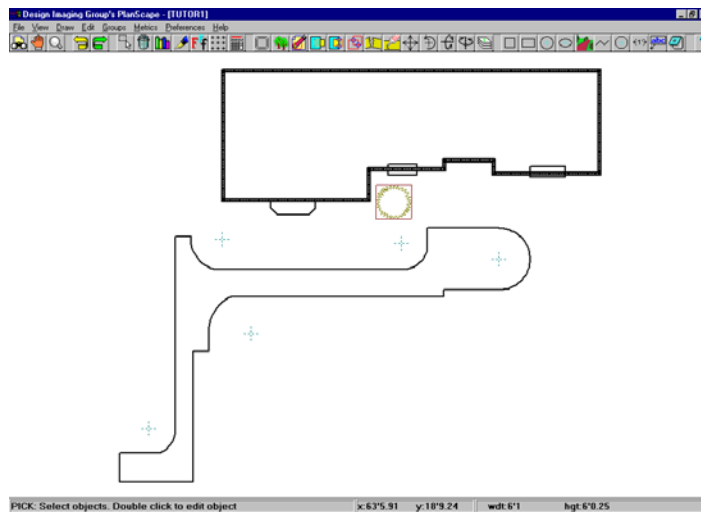
We will choose the Amethyst Flower / 6" pot.



Press the Okay button



Now drag the Plant symbol to where you want it on your drawing.

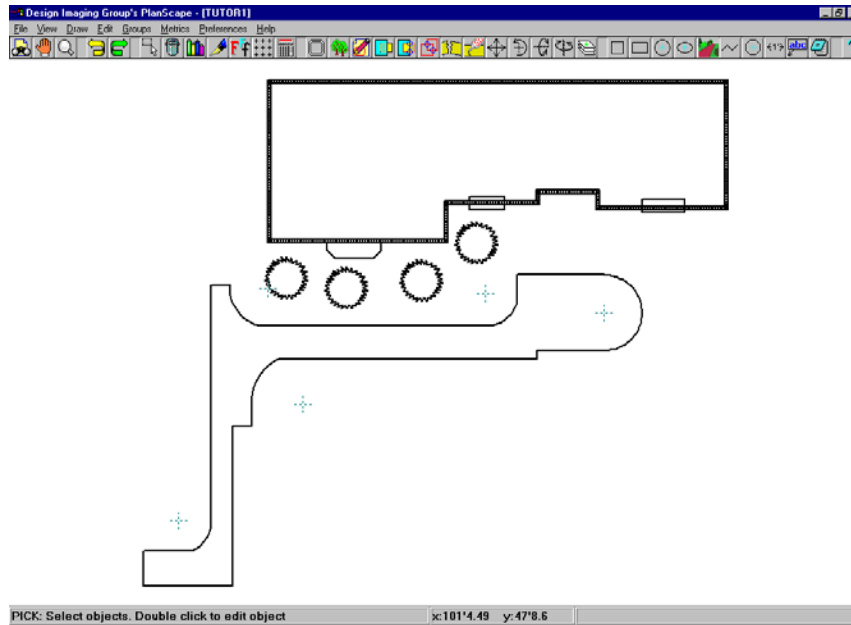


This symbol on this drawing represents the Amethyst 6" pot flower. As long as you duplicate this item on the drawing, it will retain its relationship with the Amethyst 6" pot. If you use a new symbol from the model list, you will have to "Load" it with the inventory item each time you place a symbol from the model onto your drawing

## Projects/Bidding/Estimating

//////////////////////////////////////CLIPPRO//////////////////////////////////////

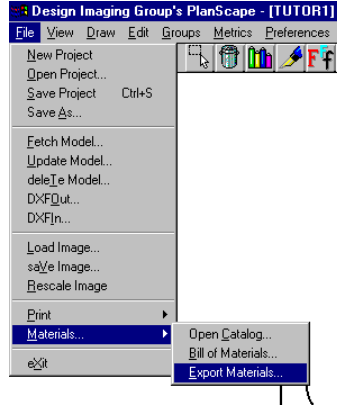
We have duplicated this symbol three times to produce 4 Amethyst 6" pot flowers on the drawing.



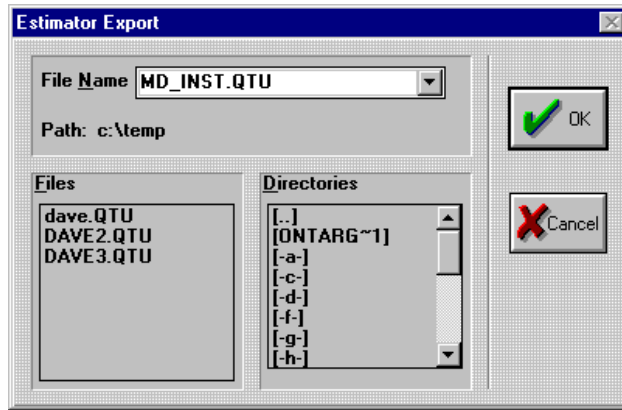
We are now finished with producing the drawing in **PlanScape**

### Step 3 – Export a quote file from PlanScape

Now choose the File/Materials/Export Materials from the main menu of **PlanScape**



Place the Quote file in a temporary directory (C:\TEMP) and name it something that you will remember (such as the customer's name).



You are finished with **PlanScape**. You can now go back into **CLIP**.

**Step 4 - Create a new project for your customer in CLIP**

In File Maintenance you should choose your customer and press the Projects button. Create a new project to receive the bill of materials from **PlanScape**.