

CLIP Visual and Snow Plowing Contracts.

Snow removal is a unique business. Not only is it entirely un-predictable as to when the “crisis” will happen but it is equally unpredictable as to whether the season will “feast” or “famine”. Some seasons have heavy snowfall that benefits the “Per Time” contracts but kills the contractor on his “monthly” contracts. Equally, if there is a below-normal snowfall, it will benefit the contractor on his “monthly” contracts but cause little or no income on his “Per Time” contracts.

Some contractors try to avoid the “feast or famine” by having a mix of contracts but why can’t a contract be created that will level this income out no matter what happens? This is the reason that CLIP has created this module.

There are some creative ways of handling these problems, making sure that you get paid for owning, maintaining and keeping the equipment ready, even if there is no snow and to make sure that you get paid if the snowfall is above normal.

Using these contract ideas, you can structure a contract that benefits both yourself and the customer, no matter what the weather brings.

In structuring these contracts there can be many variables, both how many times it snows, how much it snows each time and what is included and excluded in the pricing. It is CLIP’s job to keep track of all of these details and do all of the calculations so that you can concentrate on getting the snow removed and making the customer happy!

CLIP has been enhanced to handle a variety of Snow Plowing contracts. Because of the unique nature of snow removal and the way contracts are set up, handling all of the details can be very daunting. CLIP for Snow Removal makes it easy and profitable!

The approach that we will take in this guide will be to discuss the different contracts and how we would set up these contracts in CLIP.

There are five different contract types that are discussed in this guide:

1. Per Inch Contract – This is a simple contract that charges by the inch plowed.
2. Limited Seasonal Contract – This contract is based on a maximum number of occurrences and/or a maximum number of inches per season with an extra charge when this maximum is exceeded.
3. Minimum charge or Monthly retainer fee contract. This type of contract has a built in minimum charge if the occurrence or expected monthly income charge is not reached.
4. Multiple Installments per month – This gives you the ability to charge a separate installment for each type of service you offer. This is an added function to CLIP that can be used in conjunction with other contracts.
5. Installment seasonal increase. Using the functionality from # 4 you can build in automatic seasonal or yearly increases for a long-term multi-year contract.

1. Per Inch Contract.

Setup

This contract would have a set charge for snow removal from 1-2 inches, 3-4 inches, 5-6 inches and so on. Each price can be entered into CLIP under the "Job Change" button.

Job List for Customer: STARR, LEWIS

Jobs | Job Detail | Schedule | Notes | Chemicals | Picture

Job # 1 Customer #: 22 Property Name: STARR, LEWIS

Job Description: Snow Removal - Main Job

Job Category: [Dropdown]

Job SubCategory: [Dropdown]

Job Type: [Dropdown]

JB.Custom Letters: [Text]

JB.Custom Numerical: 0.00

Crew Number: 99

Routing Sequence: 33200

Map Location: [Text]

Charge per Job: 150.00 Calc1

Man Hour Rating: 0.50 Calc2 \$/Man Hour

Charge Per Hour: 35.00

Job Area: 0

Tax Type: D Part of Contract/Pre-Pay

Average Time: 0.39

Materials/Subs: 0.00

Item: Gardening

Job Change Auto? Seq

Min	Max	Dne to Dte:	Chrg. Ovr	Max:
0	70	70	200.00	...

Last Job Performed: 02/18/03

Job Change Button

By clicking on the Job Change button you will be able to set up multiple Job Changes under this job.

Seque	Description	Job Type	Amount	Charge	Tax Code	Man Hour	\$ per Hour	Part of	Mat Cost
1	Snow Plowing 0"-3"	SNO3	25.00	0.00	D	0.50	0.00	N	0.00
2	Snow Plowing 3"-6"	SNO6	35.00	0.00	D	0.80	0.00	N	0.00
3	Snow Plowing 6"-9"	SNO6	55.00	0.00	D	1.00	0.00	N	0.00

The number of Job Changes is unlimited.

Each job change has details that can be filled in that will replace the current settings in the job at the time of recording and posting the work.

These details are shown below:

Auto Change Job List for: KNIGHT, BRIAN (HOME) Job #51

Jobs | Job Detail | Notes

Job # 51 Customer #: 22 Property Name: KNIGHT, BRIAN (HOME)

Seque 1

Job Description: Snow Plowing 0"-3"

Job Type: SNO3

Charge per Job: 25.00

Man Hour Rating: 0.50

Tax Type: D

Item: Snow Removal Class:

Default Qty: 3

Charge Per Hour: 0.00

Materials/Subs Cost: 0.00

Job Description – this is what the customer will see on their invoice/statement when this job is recorded as done. Notice that you can change the description for each Job Change.

Job Type: this is an internal note for yourself. CLIP will place this “Type” field in the history allowing you to access reports and lists. For example, we could see all transactions that have a type of “SNO3” or export these to Excel for further study.

Charge per Job: This is what will be charged to the customer or placed in your daily grosses if the job is part of contract. Notice that for each Inch Range, you can have a separate charge.

Man-hour Rating: Since the charge can be different, you will want to adjust the budgeted man-hour rating for each Job Change.

Default Qty: Use this field to keep track of the quantity that you are using. For example, on a 3-inch snow, you would record a 3 in the qty, and then you can get totals for quantities spent during a season or for a customer. You can change the quantity as you record the job as done.

You can also use this for Bags, Tons, Lbs or other things that you would want to keep track of in this job. Remember that what you are doing here is filling out the defaults to make it easy to change when the Snow Event actually happens.

Charge Per Hour: This is used on jobs that you would be charging by the hour for. If you had a job called Shoveling, your charge per hour might be lower than a job using an operator and a front loader.

You would use this if you had a generic job called Snow Clean Up and you wanted to have three different options under it, all charged by the hour: 1.) Ice Melt, 2.)Shoveling, 3.)BobCat. You would have three different Job Changes with different Charge Per Hours in each of them. Then when you are recording the work you simply choose the Job Change that pertains and enter the start and stop times for the crewmembers, and then press "Re-Calc – 'Y'" and CLIP will figure the charge for you.

Materials/subs Cost: Enter the amount that you will be paying for materials or for your Sub Contractors. CLIP uses this to figure out your true Dollars/Hour for labor. Since each of these can change depending on what job is actually being performed, you can enter a different one for each Job Change you have.

Tax Type: Since some actions can be taxable but others might not, enter the tax type you want for each of the Job Changes.

Items/Classes – Credit/Debit: Depending on what version of CLIP you use, you will either have Credit and Debit account numbers (QBLink, Clinker or Peach Tree Link) or Items and Classes (qCLIP). These are unique to each Job Change.

Note: Any of these fields that are left blank will not overwrite what is in the job at the time of recording the work. For Example: if you leave the Job Description blank then when you change the job using the Job Change function it will not change the job description from what is in the main job.

Recording the work

When the Snow Event happens, you will have to load the work bank. You can do this by activating your Zone Jobs and refreshing the work bank.

To set a job up as a Zone type job, from the Schedule tab, pick Zone for the Schedule Type:

Job List for Customer: KNIGHT, BRIAN (HOME)

Jobs | Job Detail | Schedule | Notes | Chemicals | Picture

Job Description: Snow Plowing 0"-3"
Job #51

Schedule Type: Zone
 Zone Status: Pending
 On Hold? N

Last Visit: //

Keep Doing Job Until? Not related 0 (0=None)
 Countdown: 999 (999=None)

Routing Information

Crew Number: 50

Routing Sequence: 0

Map Location:

Last Job Performed: //

Change the Category and Sub-Category in the job to be used later for activating the jobs.

Job List for Customer: KNIGHT, BRIAN (HOME)

Jobs | Job Detail | Schedule | Notes

Job # 51 Customer #: 22 Property Name: KNIGHT, BRIAN (HOME)

Job Description: Snow Plowing 0"-3"

Job Category: Snow Removal

Job SubCategory: Snow 1 inch

Job Type:

JB.Custom Letters: SN

JB.Custom Numerical: 0.00

Crew Number: 50

Routing Sequence: 0

Map Location:

Times 0
 Qty 0

Charge per Job:

Man Hour Rating:

Charge Per Hour:

Job Area:

Tax Type: D

Average Time:

Materials/Subs:

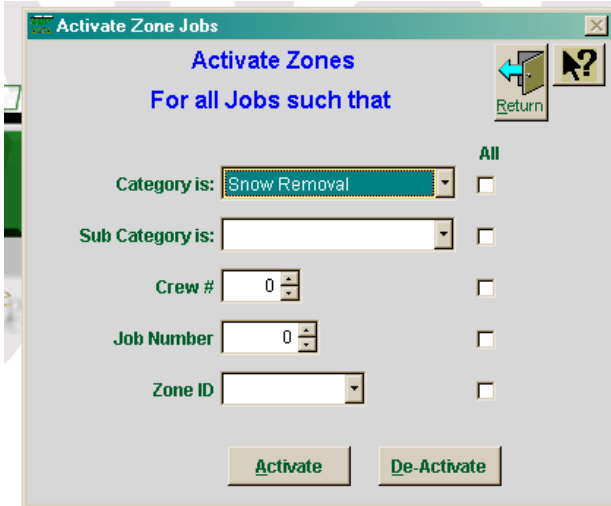
Rt Invoice Printed Invoice #: 0
 Date Printed: //

Salesman: Sold Date:
 Commission Rate: 0.00

Item: Snow Removal

Last Job Performed: //

When the Snow Event happens, Activate your Snow Removal jobs using the Activate Jobs function from the Daily Routines Menu.



Choose the Snow Removal Category and activate your Snow Removal jobs.

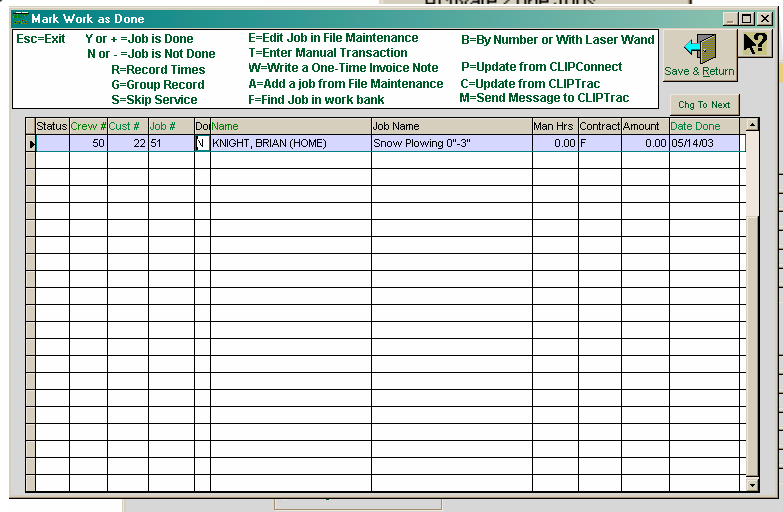
Refresh the work bank and the Snow Removal jobs will be in the work bank, ready to print out route sheets and/or upload to CLIPConnect or CLIPTrak.

After the work has been done, you will want to use the Job Change option to quickly record the charges and information.

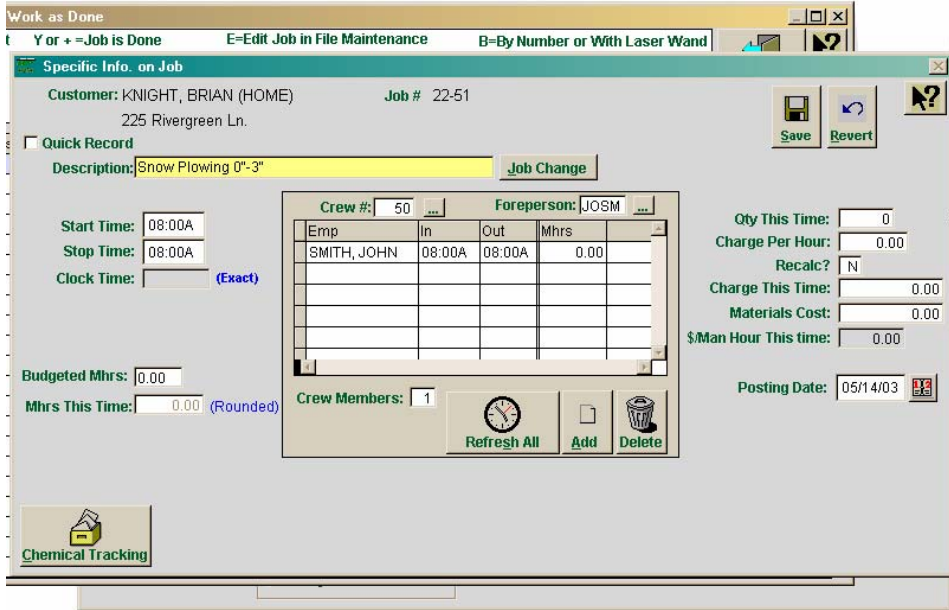


From the Record Work Screen, click on Mark Work as Done.

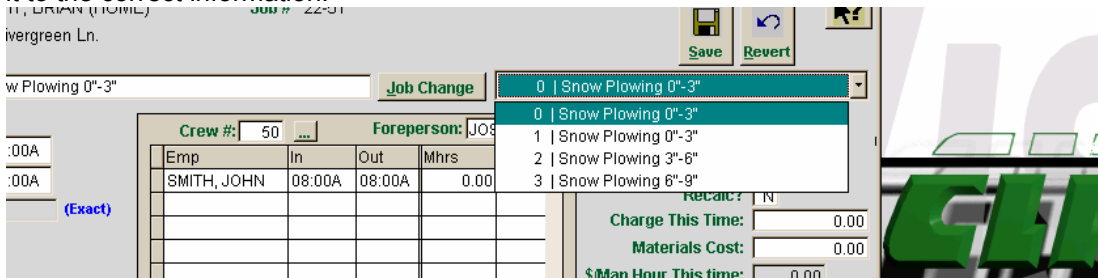
From the Mark Work Screen enter an "R" on the job.



Now you will be at the Record Times screen for this job.



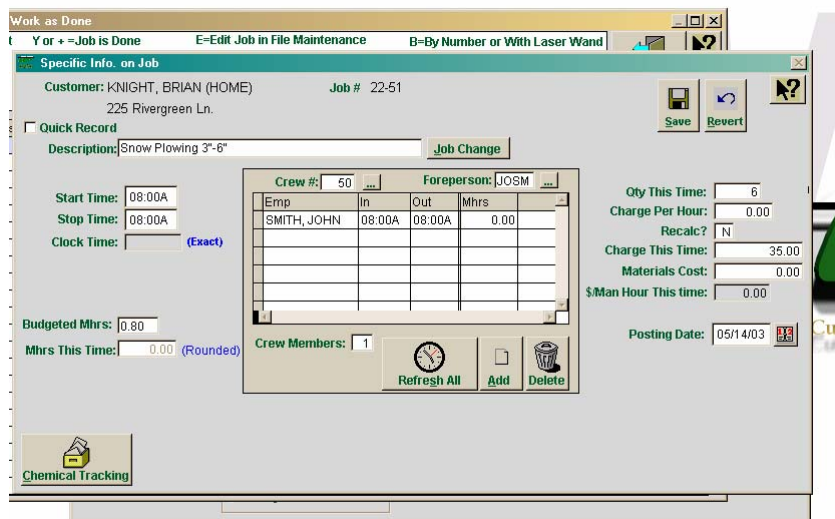
Since the Snow Event was in the 6-9” category, we can click on the Job Change button to change it to the correct information:



Choose the 3-6” job and CLIP will enter all of that information into the job for you.

Enter your times and save your changes, and you are finished.

This is a quick and easy way to have multiple charges for a customer that will be based on an event or parameters that happen later. All of your job costing remains under the same job but the charges can be different.



2. Limited Seasonal Contract.

Description:

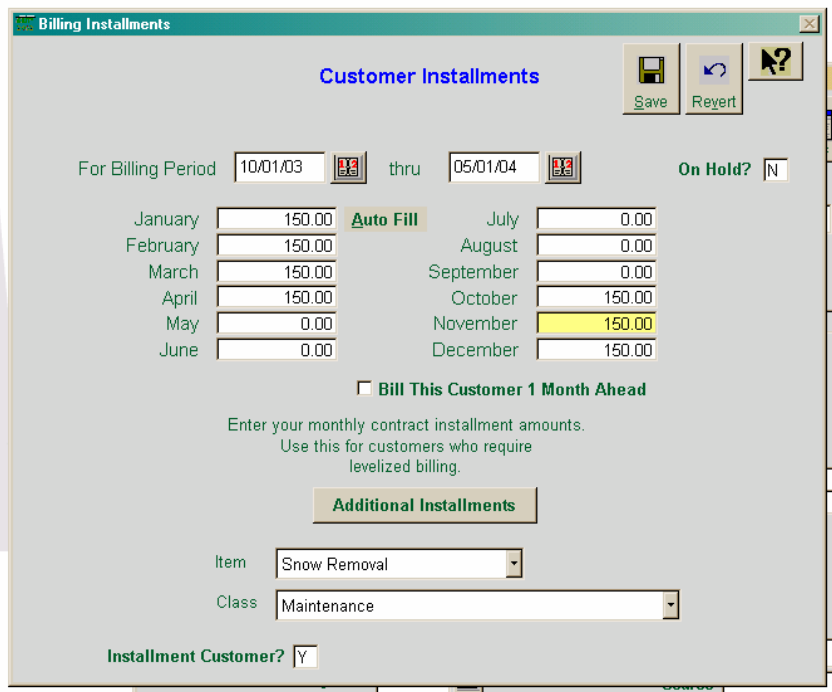
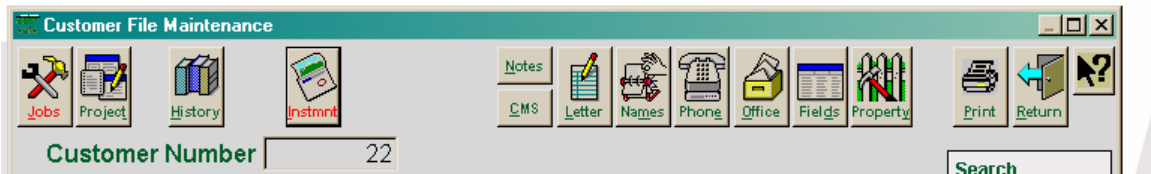
This contract has a set monthly payment with a charge over Max if either the quantity or the occurrences are exceeded.

For example: the contract could read: \$150.00 per month which covers up to a maximum of 35 inches per season or up to 8 events per season. Any excess of either inches or events will be charged at the prescribed rate.

This contract protects you against overages but guarantees a monthly income whatever the weather might bring.

Setup

First, you must set up the monthly charges, from the customer file maintenance, click on the Installment button to make this customer a contract customer and to enter the installments necessary.



Enter the start and stop dates for these installments and enter \$150.00 into each month from October to May. CLIP will automatically charge \$150.00 per month each time you process your billing.

This takes care of the first portion of the contract. Now set up the jobs.

Job List for Customer: KNIGHT, BRIAN (HOME)

Jobs | Job Detail | Schedule | Notes | Chemicals | Picturg

Job # 51 Customer #: 22 Property Name: KNIGHT, BRIAN (HOME)

Job Description: Snow Plowing

Job Category: Snow Removal

Job SubCategory: SNOW REMOVAL

Job Type:

JB.Custom Letters: SN

JB.Custom Numerical: 0.00

Crew Number: 50

Routing Sequence: 0

Map Location:

Invoice #: 0

Date Printed: / /

Salesman:

Commission Rate: 0.00

Sold Date: / /

Charge per Job: 0.00

Man Hour Rating: 0.00

Charge Per Hour: 0.00

Job Area: 0

Tax Type: D

Average Time: 0.00

Materials/Subs: 0.00

Item: Snow Removal Class:

Part of Contract/Pre-Pay

Last Job Performed: / /

	Min	Max	Dne to Dte:	Chrg. Ovr Max:
<input checked="" type="checkbox"/> Times	0	999	0	0.00
<input checked="" type="checkbox"/> Qty	0	0	0	0

Mark the job as "Part of Contract". This tells CLIP not to charge directly for this job unless the Max has been exceeded.

Make sure that the check box for Times and Qty are both checked on.

Now enter an 8 in the Max Times and 32 in the Max Qty.

Property Name: KNIGHT, BRIAN (HOME)

Job Change

	Min	Max	Dne to Dte:	Chrg. Ovr Max:
<input checked="" type="checkbox"/> Times	0	8	0	0.00
<input checked="" type="checkbox"/> Qty	0	32	0	0

Charge per Job: 0.00

Calc1

We will still use the Job Change button for this job since we need to keep track of how many inches are being plowed.

From the Job Detail page, click on the Job Change button.

Auto Change Job List for: KNIGHT, BRIAN (HOME) Job #51

Add Delete Return

Jobs		Job Detail				Notes			
Sequenc	Description	Job Type	Amount	Charge	Tax Code	Man Hours	\$ per Hour	Part of	Mat Cost
1	Snow Plowing 0"-3"	SNO3	25.00	0.00	D	0.50	0.00	N	0.00
2	Snow Plowing 3"-6"	SNO6	35.00	0.00	D	0.80	0.00	N	0.00
3	Snow Plowing 6"-9"	SNO9	55.00	0.00	D	1.00	0.00	N	0.00
4	Snow Removal 9-12"	SNO0	125.00	0.00	D	2.00	0.00	N	0.00

Enter the detail information for each of these jobs, just as in the first contract but now, enter the information for the Charge Over Max for each one.

Auto Change Job List for: KNIGHT, BRIAN (HOME) Job #51

Add Delete Save Revert

Jobs Job Detail Notes

Job # 51 Customer #: 22 Property Name: KNIGHT, BRIAN (HOME)

Seque 1

Job Description: Snow Plowing 0"-3"

Job Type SNO3

Charge per Job: 25.00

Man Hour Rating: 0.50

Charge Over Max: 25.00 ...

Default Qty: 3

Charge Per Hour: 0.00

Materials/Subs Cost: 0.00

Tax Type: D Part of Contract/Pre-Pay

Item Snow Removal Class

Notice the (...) button to the right of the Charge Over Max. Click on that button and you will see a place to change the description and the Items or GL Link codes.

Charge Over Max Details

Charge Over Max Details Save Revert

Job Name Your contract was exceeded. Extra Charge.

Item

Class

This description will be substituted if the charge over max is reached. That way, your customer will not have to wonder why the charge is above the monthly payment.

Make sure that you have filled in all of the Charge Over Max fields so that when you change from one Job Change to another, it will get recorded properly.

Seq	Description	Job Type	Amount	Charge	Tax Code	Man Hour	\$ per Hour	Part of	Mat Cost
1	Snow Plowing 0"-3"	SNO3	25.00	25.00	D	0.50	0.00	Y	0.00
2	Snow Plowing 3"-6"	SNO6	35.00	35.00	D	0.80	0.00	N	0.00
3	Snow Plowing 6"-9"	SNO9	55.00	55.00	D	1.00	0.00	N	0.00
4	Snow Removal 9-12"	SNO0	125.00	125.00	D	2.00	0.00	N	0.00

Note that a quick way to do this is right in the Job Change grid itself.

Now the job is set up and so is the customer. Record the work as done in the same way as you would with the first contract and CLIP will take care of the rest. As the jobs get done, CLIP will tally up the quantities and the number of events and if either one are exceeded, CLIP will charge the extra amount.

Note: You can see the total quantities from the History button on the job screen. Also, note that you can print a report of these quantities if you need to send it to a customer.

3. Minimum Snow Charge or Monthly Retainer Fees

Description:

This contract or part of a contract can be used in conjunction with other contracts to make sure that you get a certain amount of income for a period of time. CLIP will automatically enter compensating charges to make sure that you bill the customer for the minimum amount as specified in this contract.

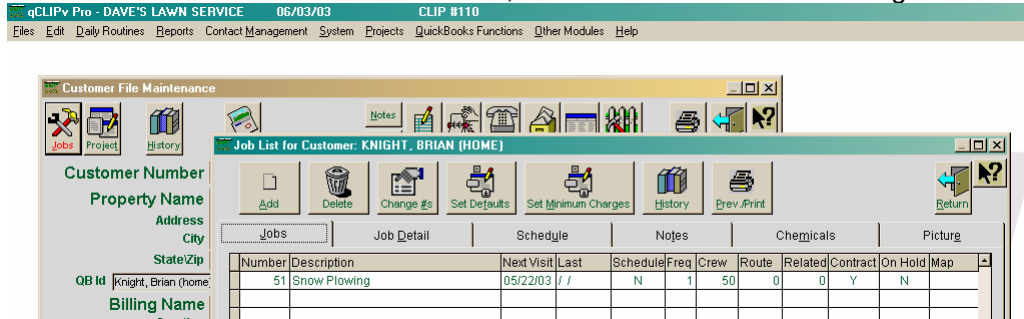
The Contract would read something like this:

The company will supply snow removal services to the client on an "As needed" basis per our contract. At the end of the month (or season), if billings for these services do not equal or exceed \$1,500.00 per month (or per season) an adjustment to the bill will be made for the difference.

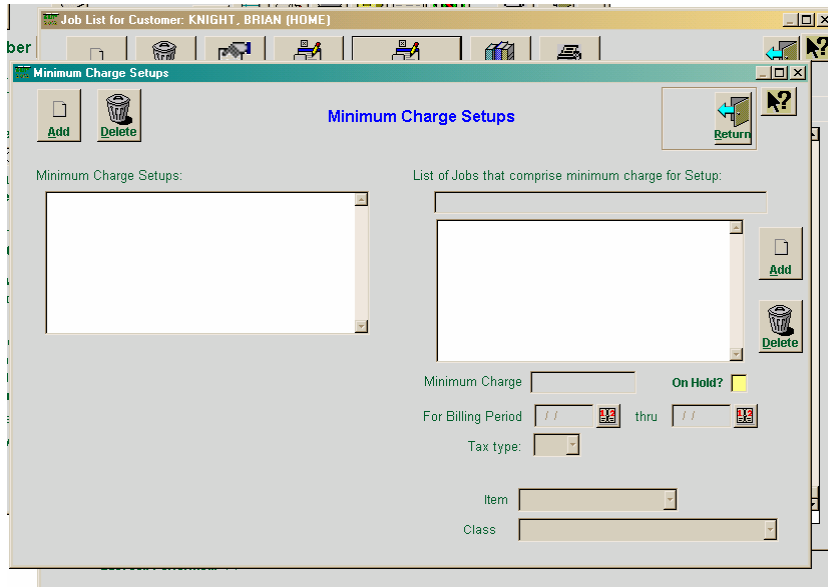
Setup

To set this up, you would follow the instructions for contract # 1 but then you would do the following:

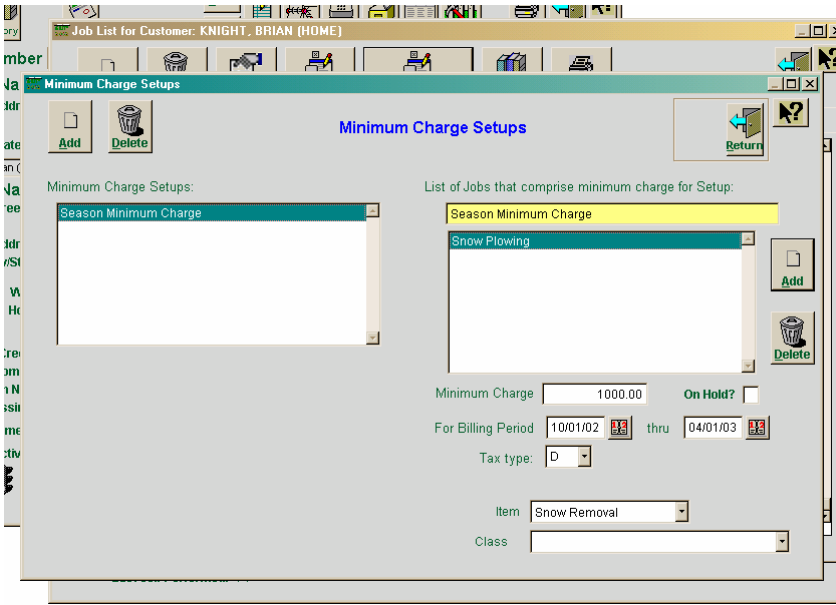
From the Jobs button on File Maintenance, click on the "Set Minimum Charges" button.



At first the screen will be blank.



Click on the Add button (upper left) to add a minimum charge setup to this customer. Enter the name, minimum charge, start and stop billing date, tax type and items or credit and debit account numbers for the set up.



Now press the Add button on the right to add jobs to this setup.

You can add as many jobs as the customer has to the setup.

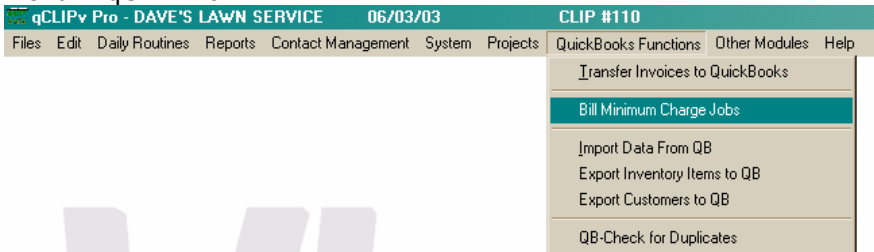
What does it do?

This function collects three pieces of information:

1. What is the minimum charge?
2. What dates should this minimum charge be calculated for?
3. What jobs count toward this minimum charge?

With this information, at the end of the season or any other time period (monthly, weekly, yearly) you can tell CLIP to process this minimum charge and add a charge to make up the difference if the customer's account does not add up to the minimum.

The processing will happen from the Billing menu in CLIPPro or from the QuickBooks Functions Menu in qCLIPPro:



This function allows you to process the minimum charges.

The screenshot shows a software window titled "Process Minimum Bill". The window contains the following fields and controls:

- Last time Minimum Charges Billed:** A text input field containing "11".
- Jobs performed during the period:** Two date pickers, each containing "11", separated by the word "thru".
- Post Date:** A date picker containing "06/03/03".
- Remind me to process again in:** A text input field containing "0" followed by the word "days".
- Buttons:** A "Return" button with a left-pointing arrow icon, a help icon (question mark), and a "Process Minium Bill" button at the bottom center.

Last time Minimum Charges Billed – shows you the last time you processed this information.
Jobs Performed during... This is where you would enter the start and stop dates for the period in question. If you are doing this monthly, it would be beginning of month and end of month or if it were seasonal, it would be beginning of season and end of season.
Post Date – This is the date that will be placed on the transaction for the customer.
Remind me to process again in... enter a number of days that you want CLIP to remind you.
Process Minimum Bill ... This will process the information.

Processing the minimum charge.

CLIP will first check each customer's record to see if they have a minimum charge set up in their record.

If they do, CLIP will add up all of the jobs listed in the Minimum Charge setup for that customer that were charged during the period specified. If the total is less than the minimum charge, CLIP will generate a debit for the remaining amount. This will be placed in the customer's journal and will be available for billing immediately.

Example:

The description on the debit will be the name of the Minimum charge setup with the date that you specified.

This will enter into the Transaction portion of CLIP and you will get a final list of transactions report for these transactions.

4 and 5. Multiple Installments

Description:

This function allows you to set up multiple (unlimited) installment sheets for each customer (under that same customer name and number). This gives you the ability to charge different monthly installments for different services. Each monthly installment page has its own 12 payments, description and start and stop date.

This function can be used to create a contract that reads something like:

Monthly payments of \$100.00 will be charged from November 1st to April 1st or the first year and in the second year Monthly payments of \$110.00 will be charged from November 1st to April 1st for Snow Removal.

A separate contract can read:

Lawn Maintenance will be charged \$300.00 per month from March 1st to November 1st for the first year and \$330.00 per month from March 1st to November 1st.

Setup

To set this up, you need to have four Installment setups for the customer.

From the File/File Maintenance choose the customer, and then click on the Installment button.

The screenshot shows the 'Customer File Maintenance' window in the qCLIP Pro software. The window title is 'Customer File Maintenance' and it displays the following information:

- Customer Number:** 22
- Property Name:** KNIGHT, BRIAN (HOME)
- Address:** 225 Rivergreen Ln.
- City:** Bowling Green
- State/Zip:** KY 42103
- Tax Id:** MD
- Cty Code:** (empty)
- QB Id:** Knight, Brian (home)
- Billing Name:** Brian Knight
- Greeting:** (empty)
- C/O:** (empty)

The interface includes a menu bar at the top with options: Files, Edit, Daily Routines, Reports, Contact Management, System, Projects, QuickBooks Functions, Other Modules, Help. Below the menu bar is a toolbar with icons for Jobs, Project, History, Instmnt, Notes, CMS, Letter, Names, Phone, Office, Fields, Property, Print, and Return. A search panel on the right side of the window contains a search box, a 'Q-Find' button, and an 'Add New' button.

From the Installment button you will see the following:

SHT, BRIAN (HOME) Search
Order By:

Billing Installments

Customer Installments

For Billing Period thru On Hold? N

January	<input type="text" value="0.00"/>	Auto Fill	July	<input type="text" value="0.00"/>
February	<input type="text" value="0.00"/>		August	<input type="text" value="0.00"/>
March	<input type="text" value="0.00"/>		September	<input type="text" value="0.00"/>
April	<input type="text" value="0.00"/>		October	<input type="text" value="0.00"/>
May	<input type="text" value="0.00"/>		November	<input type="text" value="0.00"/>
June	<input type="text" value="0.00"/>		December	<input type="text" value="0.00"/>

Bill This Customer 1 Month Ahead

Enter your monthly contract installment amounts.
Use this for customers who require levelized billing.

Additional Installments

Item:

Class:

Installment Customer? Y

You can set the first installment page to zeros. Since we will be entering additional installments, it is easier to see it on the next page.

Click on the Additional Installments button.

Additional Billing Installments

Add Delete

Additional Customer Installments

Description:

Category:

For Billing Period thru

On Hold? N

January	<input type="text" value="100.00"/>	Auto Fill	July	<input type="text" value="0.00"/>
February	<input type="text" value="100.00"/>		August	<input type="text" value="0.00"/>
March	<input type="text" value="100.00"/>		September	<input type="text" value="0.00"/>
April	<input type="text" value="100.00"/>		October	<input type="text" value="0.00"/>
May	<input type="text" value="0.00"/>		November	<input type="text" value="100.00"/>
June	<input type="text" value="0.00"/>		December	<input type="text" value="100.00"/>

Bill This Customer 1 Month Ahead

Enter your monthly contract installment amounts.
Use this for customers who require levelized billing.

Item:

Class:

Click on the Add button and add a new Installment page called Snow Removal – 2004 for the month of *M* . The *M* will be replaced with the first three letters of the month at the time the installment is generated.

Enter the starting date as 11/01/2003 and the ending date of 04/01/04. This will start and stop the installments on time. (This would be to be billed out during a normal North East Snow Removal season.)

Enter the \$100.00 payment for each month from November to January.

You are finished with the first Snow Removal installment setup for this customer. Now click on the Add button to add a new one.

Additional Billing Installments

Additional Customer Installments

Description: Snow Removal - 2004 for the month of *M*

Category: SNOW REMOVAL

For Billing Period: 11/01/03 thru 04/01/04

On Hold? N

January	100.00	Auto Fill	July	0.00
February	100.00		August	0.00
March	100.00		September	0.00
April	100.00		October	0.00
May	0.00		November	100.00
June	0.00		December	100.00

Bill This Customer 1 Month Ahead

Enter your monthly contract installment amounts.
Use this for customers who require levelized billing.

Item: Snow Removal

Class:

The difference between the 2004 and 2005 installment setups are the starting and ending dates, the description and the price.

Now enter another one for the 2004 Mowing season:

Additional Billing Installments

Additional Customer Installments

Description: Snow Removal - 2005 for the month of *M*

Category: SNOW REMOVAL

For Billing Period: 11/01/05 thru 04/01/06

On Hold? N

January	110.00	Auto Fill	July	0.00
February	110.00		August	0.00
March	110.00		September	0.00
April	110.00		October	0.00
May	0.00		November	110.00
June	0.00		December	110.00

Bill This Customer 1 Month Ahead

Enter your monthly contract installment amounts.
Use this for customers who require levelized billing.

Item: Snow Removal

Class:

And then enter another one for the 2005 mowing season.

Additional Customer Installments

Description: Lawn Maintenance - 2004 for the month of *M*

Category: LAWN MAINTENANCE

For Billing Period: 03/01/04 thru 11/01/04

On Hold? N

January	0.00	Auto Fill	July	300.00
February	0.00		August	300.00
March	300.00		September	300.00
April	300.00		October	300.00
May	300.00		November	0.00
June	300.00		December	0.00

Bill This Customer 1 Month Ahead

Enter your monthly contract installment amounts.
Use this for customers who require leveled billing.

Item: Gardening

Class:

Notice that in the month of March, the customer will receive two installments on their bill.

Since the number of installment setups is unlimited, you can add different types of installments for different types of services that you might be providing.

Notice also that you can put any of these installments on hold by entering a "Y" in the On Hold text box.

That's about it. Please email us at developmentgroup@clip.com as you use this product and let us know how we can improve it.

Thank you for purchasing our product.