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 Using Word and Excel with **CLIP**

Using Microsoft WORD and Excel with **CLIP** is a great combination. **CLIP** handles the data, names, addresses and such and WORD handles the formatting and layout of the documents and Excel can do math and other data base functions..

1. Keeping Word Documents and Excel sheets with the customer.

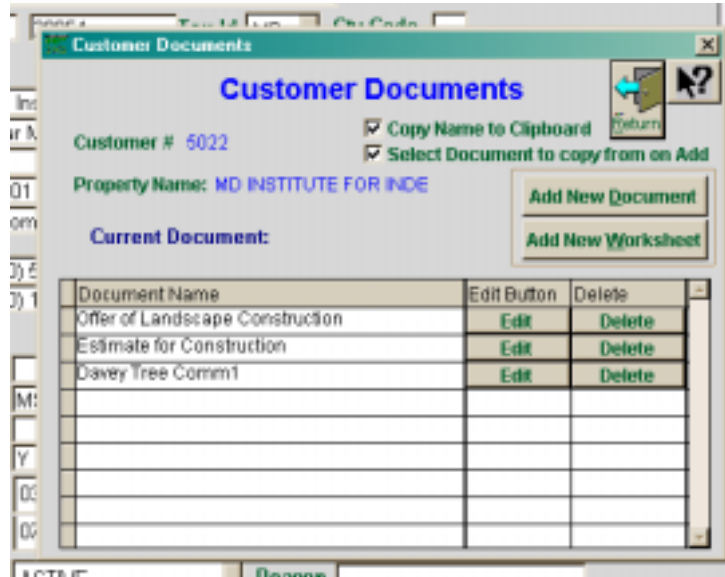
Office documents (WORD and Excel) can be kept in the customer's file. This makes it very easy to maintain past documents that you have written or Excel Sheets that you have made for a customer.

From the File Maintenance, choose a customer you want to create or copy a document for and click on the "Office" button.

The screenshot shows the 'Customer File Maintenance' window in Visual CLIP Pro. The window contains the following information:

- Customer Number:** 5002
- Property Name:** MD INSTITUTE FOR INDE
- Address:** 7507 Greenleaf Rd
- City:** Potosi
- State/Zip:** MO 63994
- Tax Id:** MD
- City Code:**
- Billing Name:** MD Institute For Independent Living
- Greening:** New Mt. Morgan
- Address:** 7507 Greenleaf Road
- City/State/Zip:** Potosi, MO 63994
- Work:** (301) 466-4555
- Fax:** (301) 466-4571
- Home:** (301) 121-4555
- Pager Phone Number:** (301) 466-4571
- Credit Limit:** 10000
- Test Customer Letters:** MS
- Customer Type:** FULL
- CL Customer Handbook:** 000
- Finance Charge:** 7
- CL Word Processing Code:** 7
- Billing Type:** Balance Forward
- Customer Size:** 03/0208
- Customer Category:**
- Last Activity Date:** 07/0605
- Status:** ACTIVE
- Person:** Customer, Vendor, Estimate, Employee

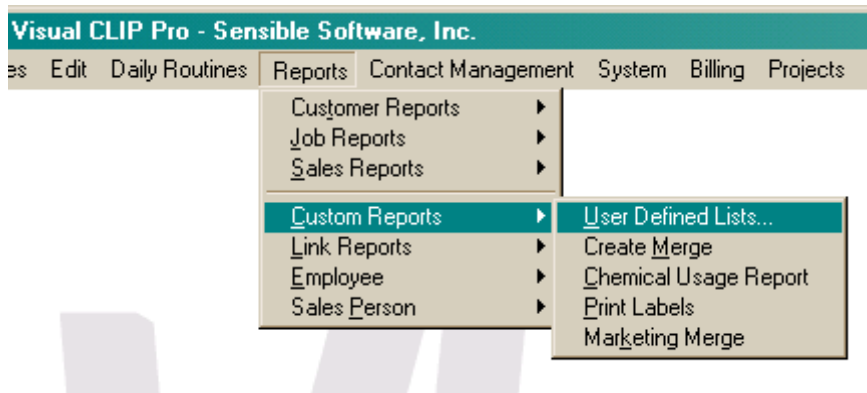
////////////////////////////////////VisualCLIP////////////////////////////////////



You can edit the document here, delete it or add a new one. When you edit the document you will be using WORD or Excel.  
 If you have "Copy Name to clipboard" checked, **CLIP** will place the name and address of the customer in the clipboard. Once you are in Word or Excel on the document, you can use the Edit/Paste function from the menu to paste the name and address into the document.

2. Mail merging from User Defined Lists

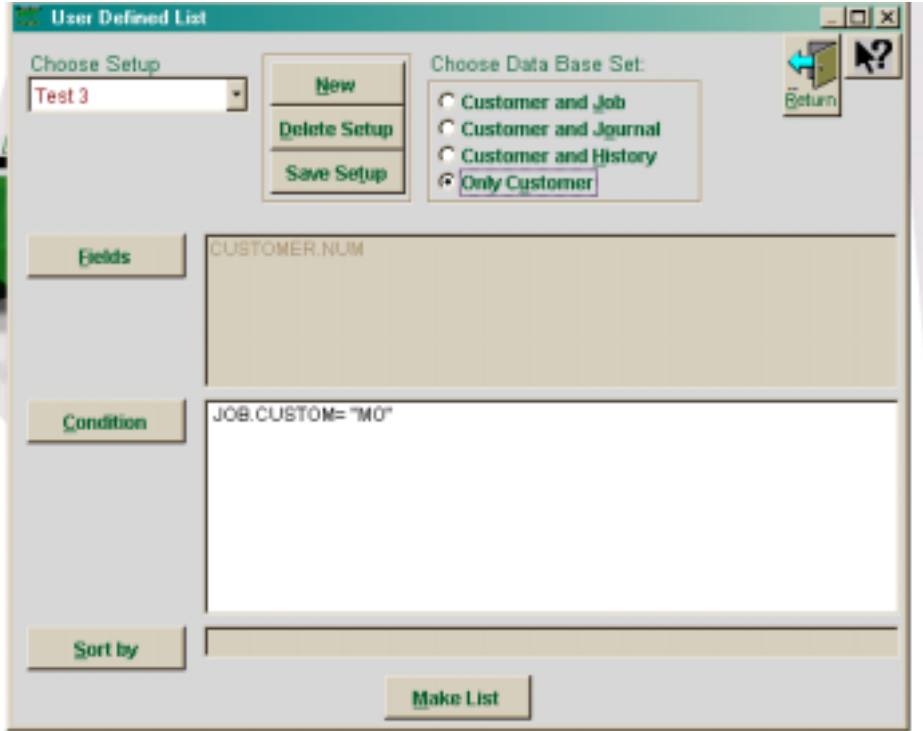
A powerful way to use Word with **CLIP** is through the User-Defined Lists. Create a list (report) of the customers you want to print a letter for.



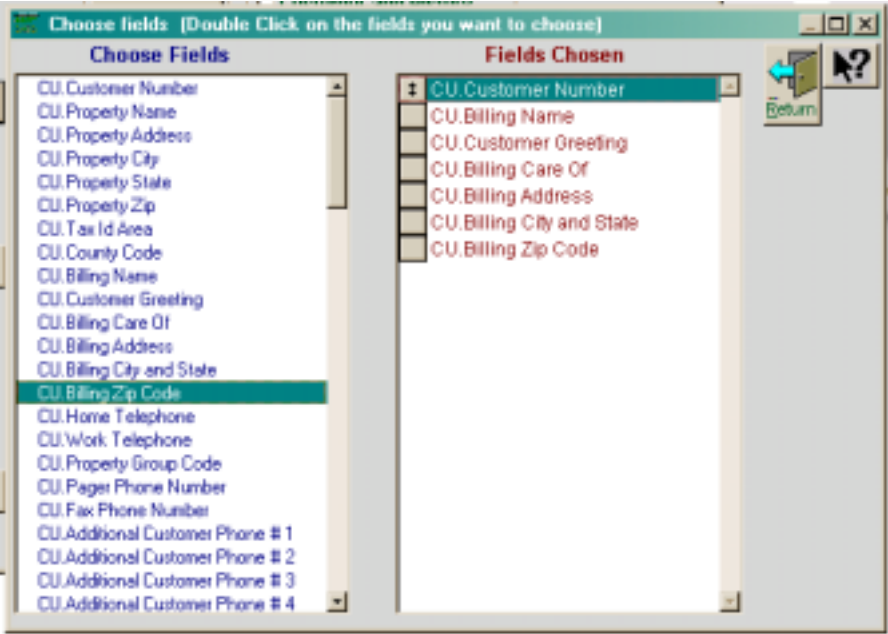
You can quickly and easily do a marketing letter for your customers.

Go to Reports>Custom Reports>User Defined Lists.

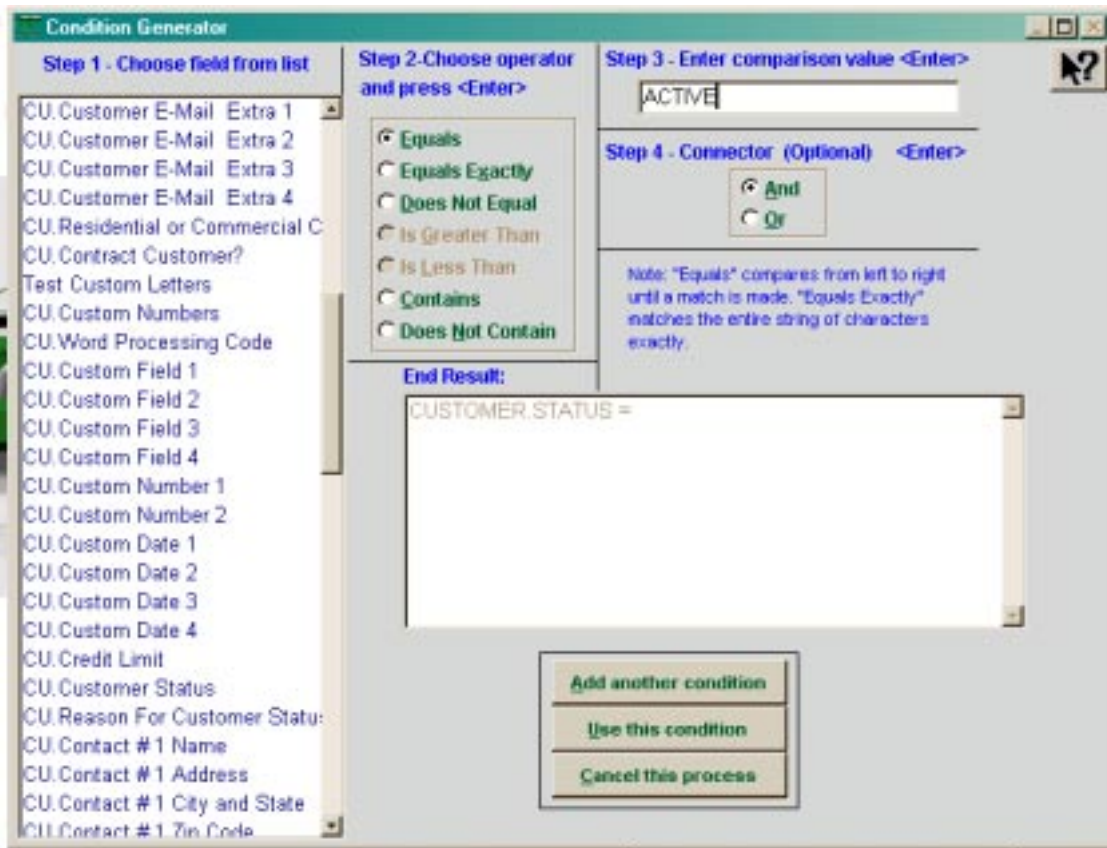
Choose Only Customer as your Data Base Set.



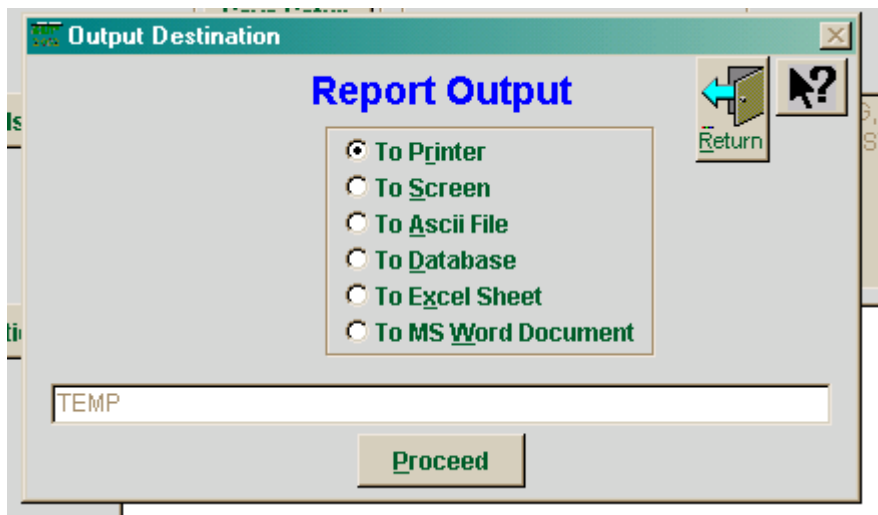
Then choose the fields that you will want on the letter:



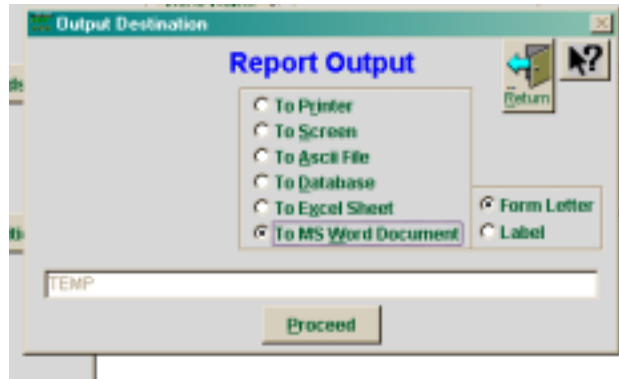
Now click on the "Condition" button to have CLIP pick out only the Active Customers.



Choose the Customer Status field , then click on the "Equals" button, then Enter the word "ACTIVE" in the comparison.  
Now click on the "Use this Condition".  
Now click on "Make List" and let *CLIP* save your setup.

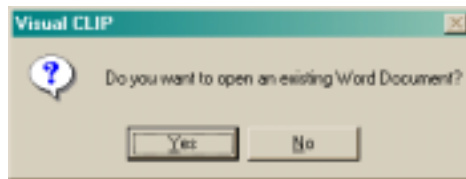


Now Click on the output to WORD.

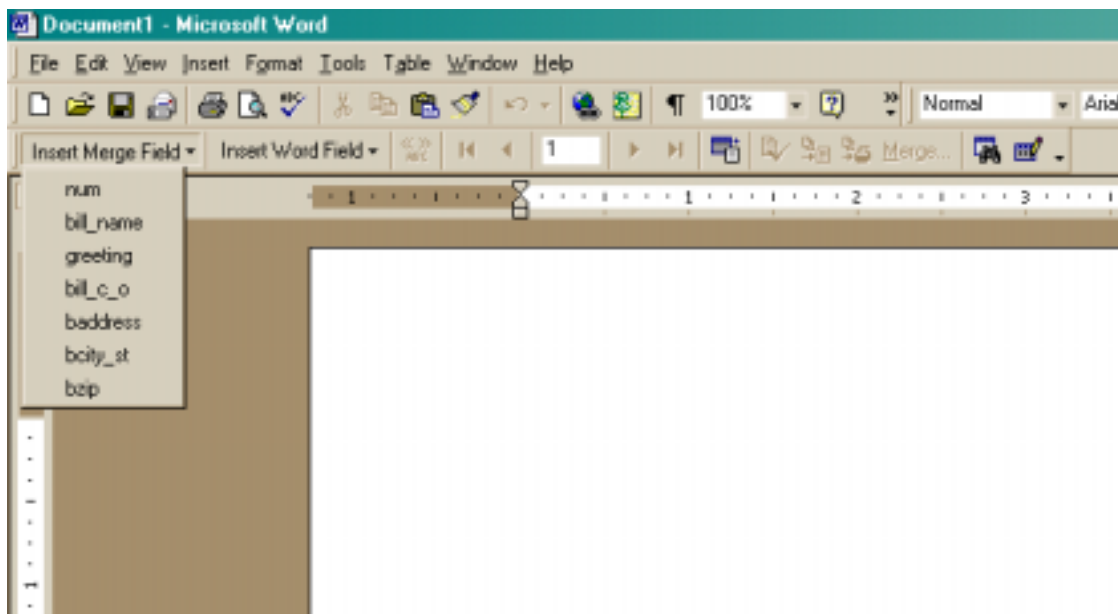


Click on Form Letters and then click on proceed.

When *CLIP* asks you if you want to open an existing document, answer "No" and you will be in a new Word Document.

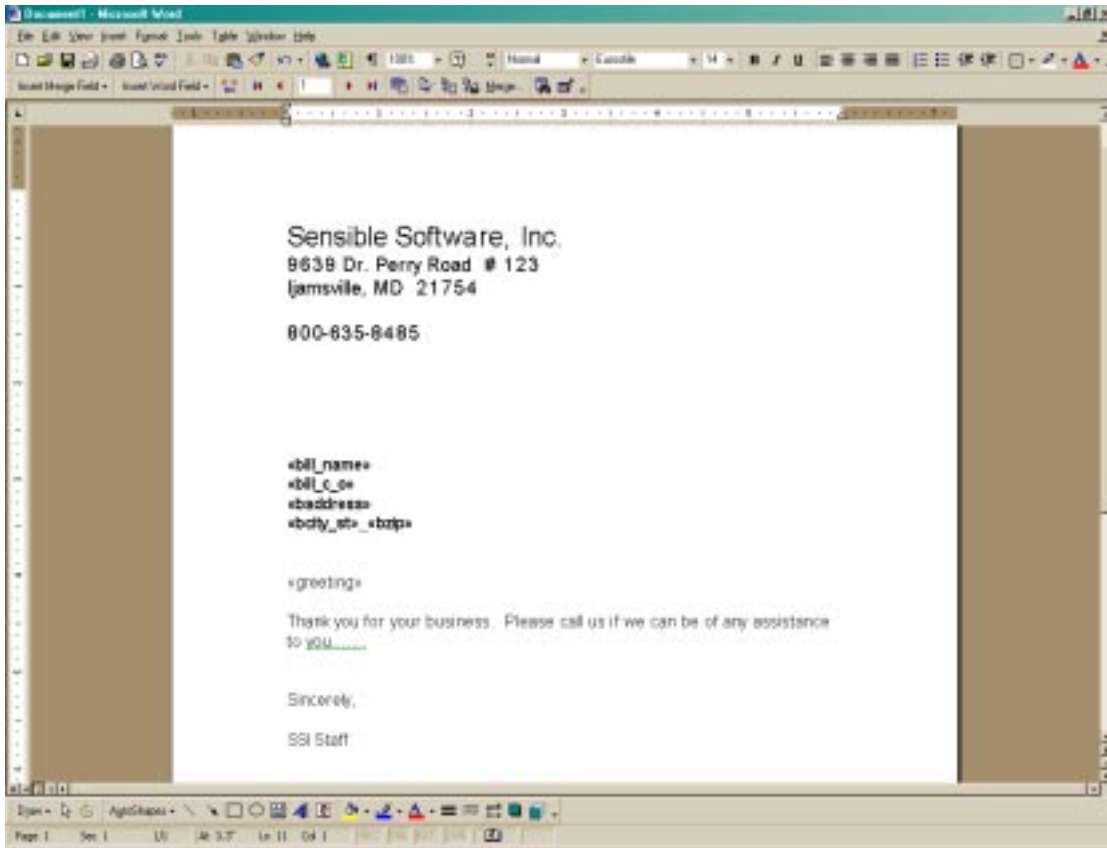


When you get into WORD, you can pull down Mail Merge fields from the upper left hand side of the document.

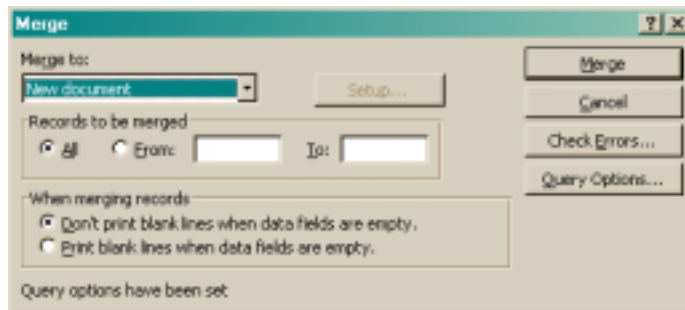
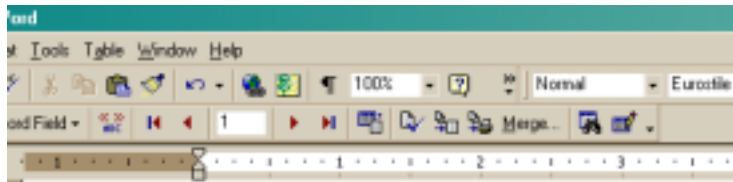


Simply insert the fields where you want to information to go on your letter.

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When you have inserted the fields you want, click on the "Merge..." button.



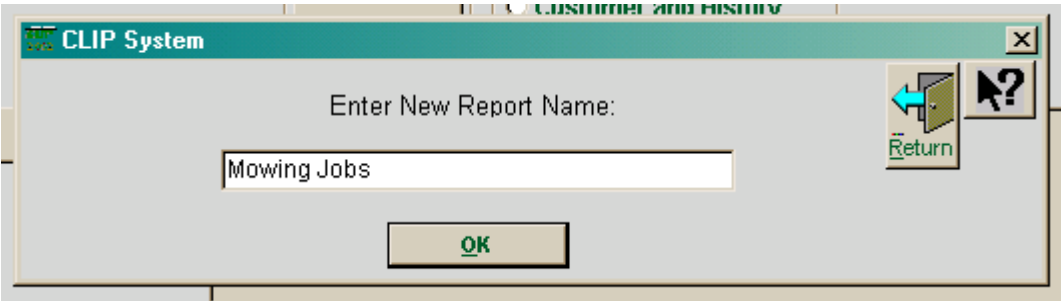
Click on the "Merge" button and WORD will make up the letters for you.



3. Using Excel from User Defined Lists

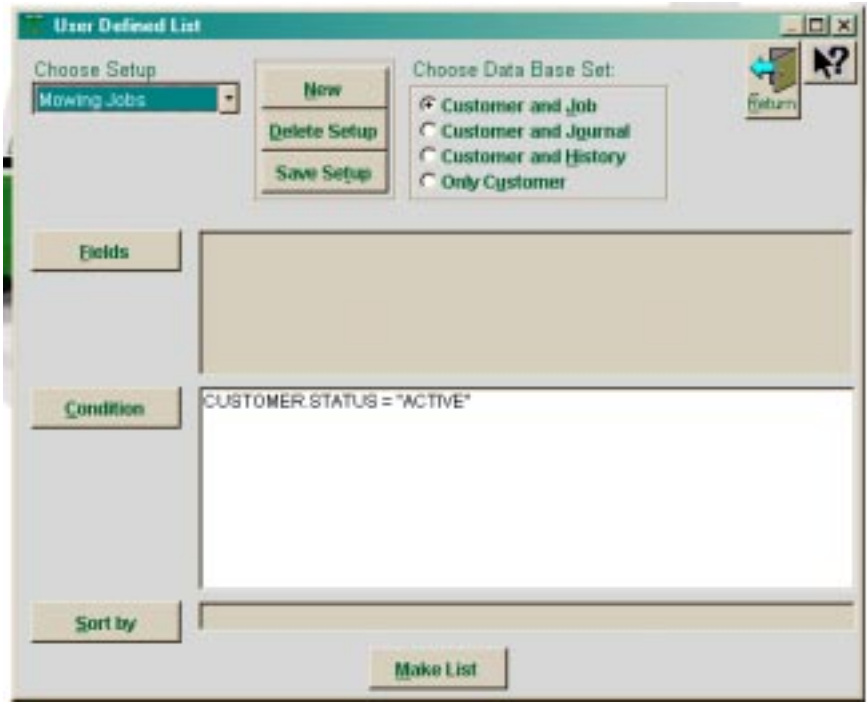
Use Excel in a similar situation when you want to use data from Customer and Job to create a spread sheet.

Create a new report by pressing the "New" button and name it "Mowing Jobs"

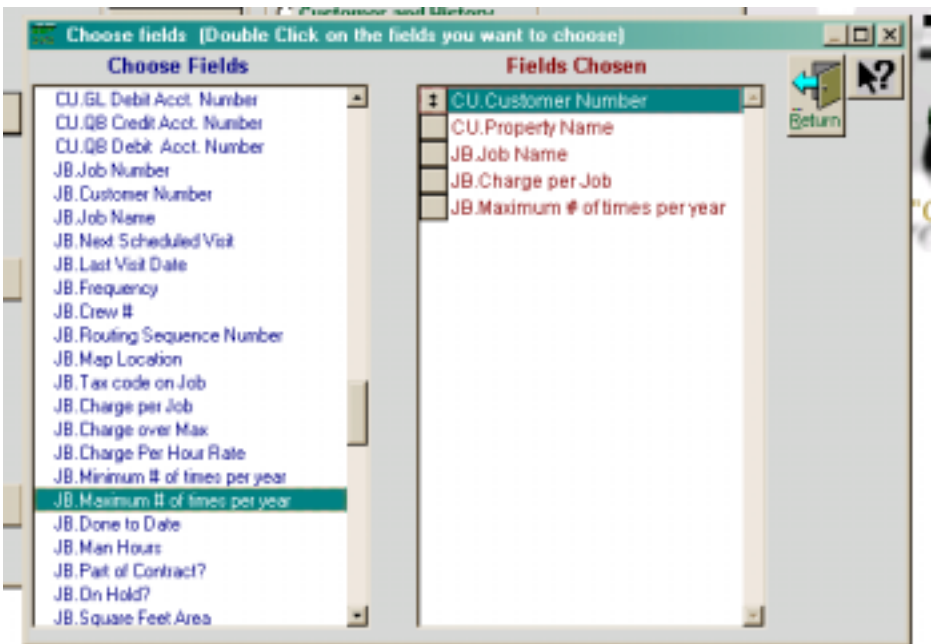


Now choose Customer and Job as your data set.

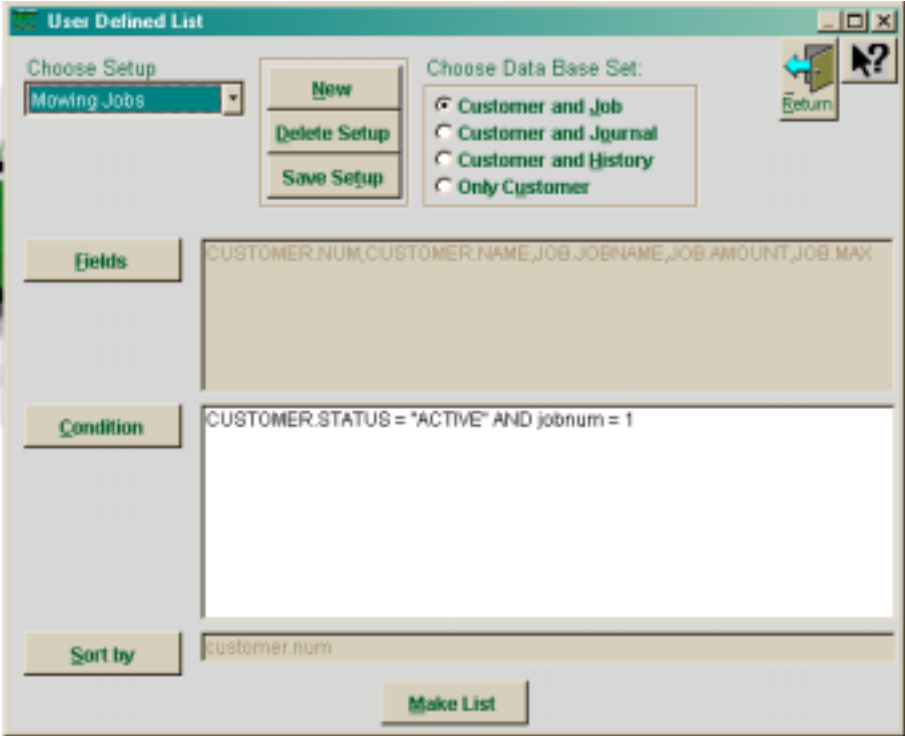
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Choose the fields that we will need:



Now enter the condition for only "Active" Customers and for Job Number = 1

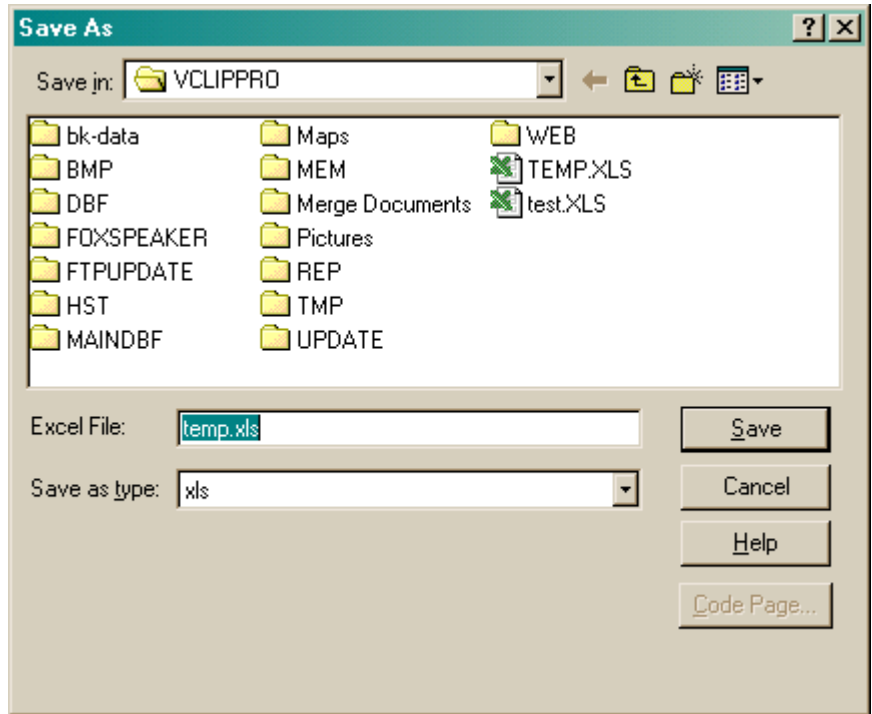


Now Press the "Make List" button.  
 Save your report.  
 Now Output to Excel Sheet.

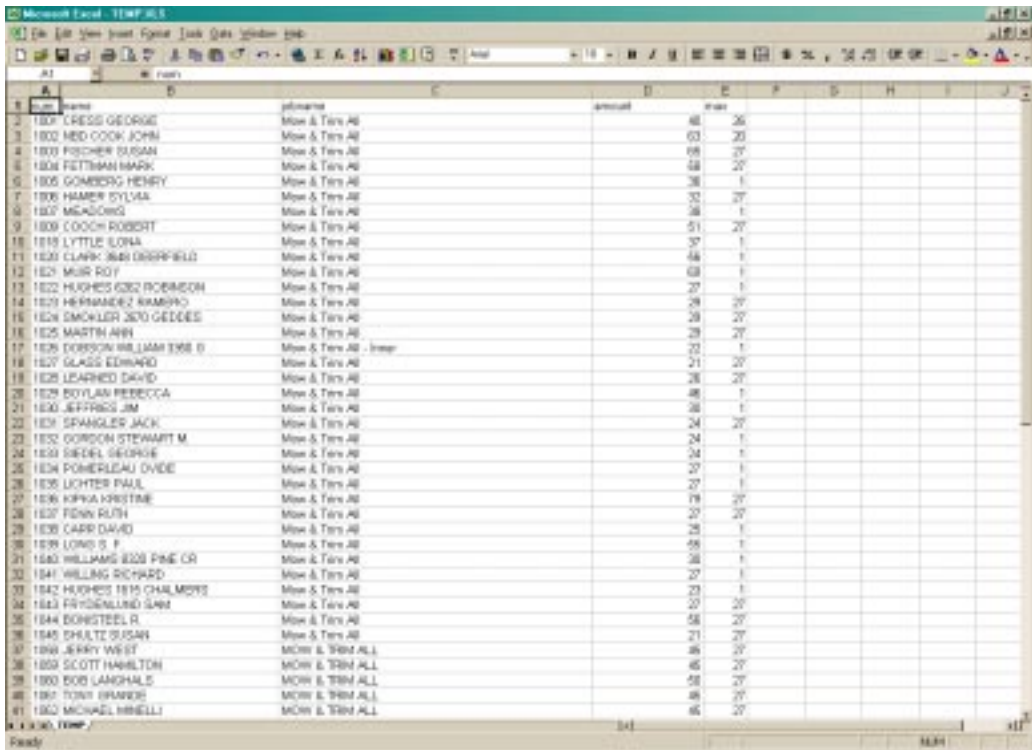


Name your file and click on the Save button.

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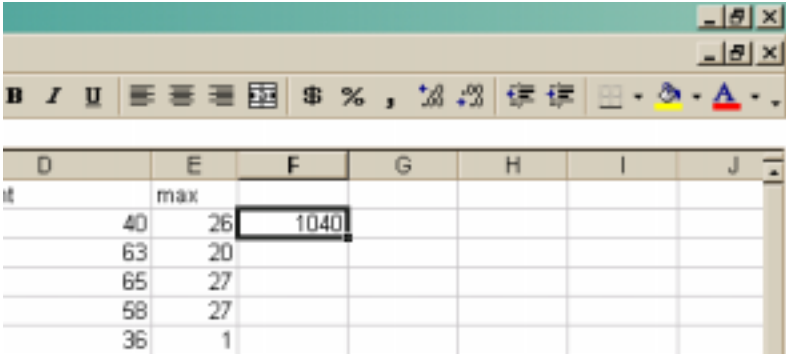


When CLIP asks you if you want to open Excel with the new file, answer Yes.



Now enter a formula in the next available column that looks like this:

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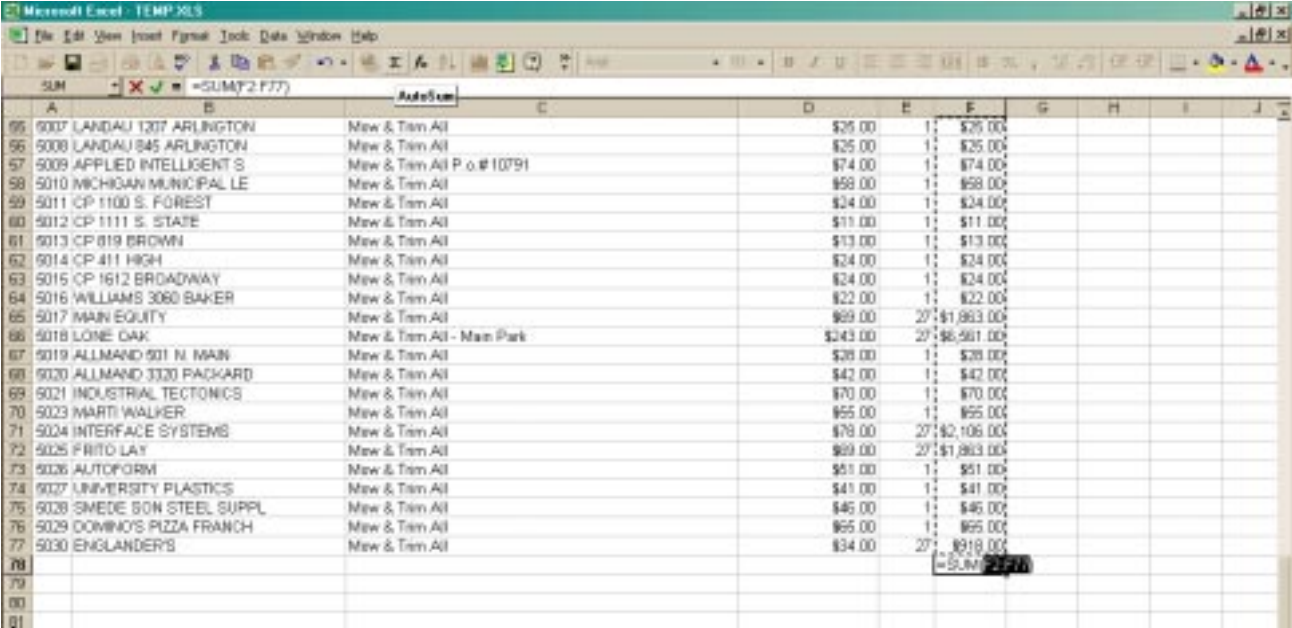


Pull that formula down the line using the little square to the lower left of the box:



Name the column Total

Now go to the bottom of the list and in the first empty cell at the bottom of the list click on the Summ function.



You now have the total for all your # 1 jobs for this year.

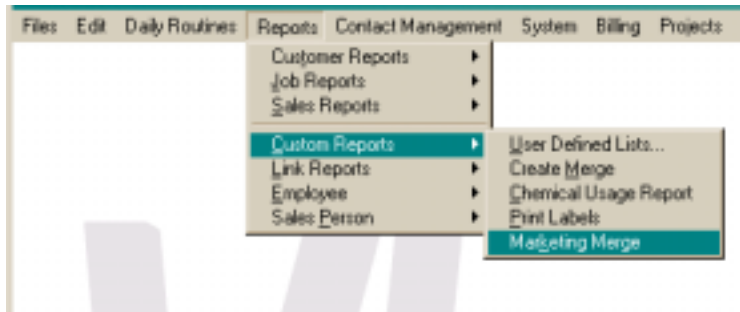
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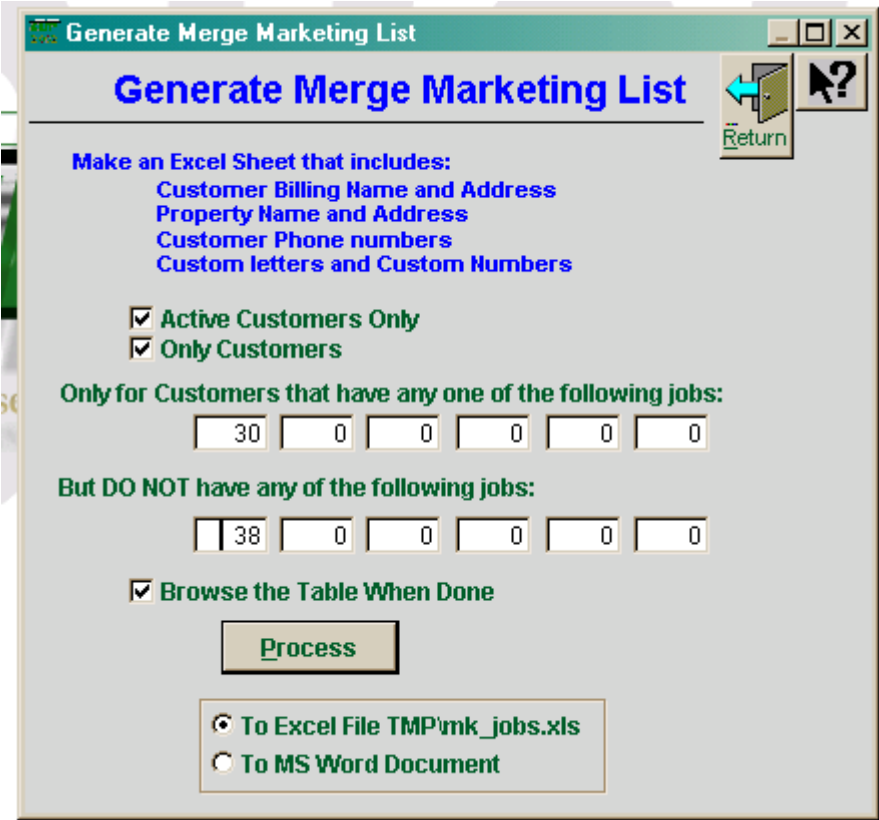
	A	B	C	D	E	F	G
55	5007	LANDAU 1207 ARLINGTON	Mow & Trim All	\$25.00	1	\$25.00	
56	5008	LANDAU 845 ARLINGTON	Mow & Trim All	\$25.00	1	\$25.00	
57	5009	APPLIED INTELLIGENT S	Mow & Trim All P.s.# 10791	\$74.00	1	\$74.00	
58	5010	MICHIGAN MUNICIPAL LE	Mow & Trim All	\$58.00	1	\$58.00	
59	5011	CP 1100 S. FOREST	Mow & Trim All	\$24.00	1	\$24.00	
60	5012	CP 1111 S. STATE	Mow & Trim All	\$11.00	1	\$11.00	
61	5013	CP 819 BROWN	Mow & Trim All	\$13.00	1	\$13.00	
62	5014	CP 411 HIGH	Mow & Trim All	\$24.00	1	\$24.00	
63	5015	CP 1612 BROADWAY	Mow & Trim All	\$24.00	1	\$24.00	
64	5016	WILLIAMS 3060 BAKER	Mow & Trim All	\$22.00	1	\$22.00	
65	5017	MAIN EQUITY	Mow & Trim All	\$69.00	27	\$1,863.00	
66	5018	LONE OAK	Mow & Trim All - Main Park	\$243.00	27	\$6,561.00	
67	5019	ALLMAND 501 N. MAIN	Mow & Trim All	\$28.00	1	\$28.00	
68	5020	ALLMAND 3320 PACKARD	Mow & Trim All	\$42.00	1	\$42.00	
69	5021	INDUSTRIAL TECTONICS	Mow & Trim All	\$70.00	1	\$70.00	
70	5023	MARTI WALKER	Mow & Trim All	\$55.00	1	\$55.00	
71	5024	INTERFACE SYSTEMS	Mow & Trim All	\$78.00	27	\$2,106.00	
72	5025	FRITO LAY	Mow & Trim All	\$69.00	27	\$1,863.00	
73	5026	AUTOFORM	Mow & Trim All	\$51.00	1	\$51.00	
74	5027	UNIVERSITY PLASTICS	Mow & Trim All	\$41.00	1	\$41.00	
75	5028	SMEDE SON STEEL SUPPL	Mow & Trim All	\$46.00	1	\$46.00	
76	5029	DOMINO'S PIZZA FRANCH	Mow & Trim All	\$65.00	1	\$65.00	
77	5030	ENGLANDERS	Mow & Trim All	\$34.00	27	\$918.00	
78						\$95,644.00	
79							
80							
81							

4. Mail merging from Marketing Merge Report

The Marketing Mail merge report is a report designed to create a marketing letter to send to your customers that receive a certain service or services but do not receive some other service or services from you. This report is based on using consistent job numbers.

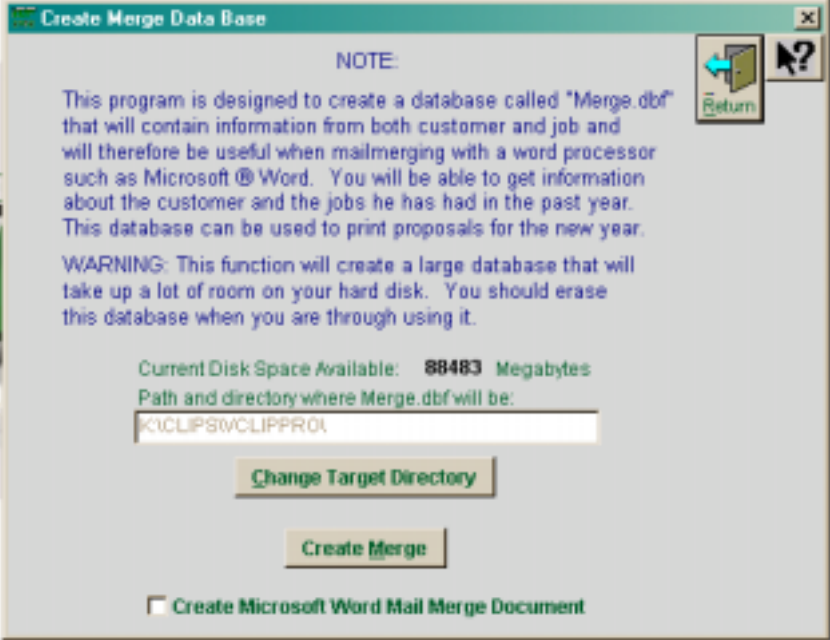
A good example would be customers that get Round 1 but do not receive Grub Treatment. If your Round 1's are all listed as job # 30 then you simply place a job # 30 in the first list of numbers and you place your Grub treatment job (# 38) in the second set of job numbers.





Now, click on the "to MS Word Document" and click on the process. Now you will be placed in Word with the mail merge fields available for you.





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