

Using Microsoft Map Point with CLIP

Microsoft Map Point is a powerful mapping program that can be used with CLIP to graphically display your properties on a map, efficiently arrange your properties in the best driving order, dynamically change that route on a day to day basis and print both a map and directions that match the route sheets for your crews.

To begin to use Map Point with CLIP, you simply need to install Map Point on the same computer that CLIP is installed on. If you are installing it on a network, you should install Map Point on each workstation to make sure that the files are registered in the Window Registry of each computer. You can install the Data CD on the File server so that you do not need to have the Data CD in the CD drive when you use Map Point. Once you have installed Map Point, you simply use it from CLIP. You do not need to tell CLIP where it is, the Windows Registry will keep track of where Map Point is and allow CLIP to access it automatically.

There are three main areas that Map Point is used:

1. From the File Maintenance, Customer Property Name screen
2. Re-Routing all of your properties
3. In rearranging your jobs before sending your crews out for the day

1. File Maintenance

From the File Maintenance screen simply click on the Map button to have CLIP bring the property up on a map.

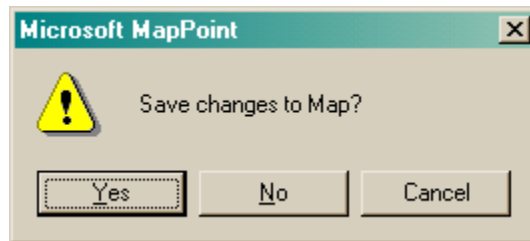
The screenshot shows the 'Customer File Maintenance' window. At the top, there is a toolbar with icons for Jobs, Project, History, Billing, Instmnt, Invoice, Bank, CMS, Letter, Names, Phone, Office, Fields, Property, Print, and Exit. The main area contains the following fields:

- Customer Number:** 5022
- Property Name:** MD INSTITUTE FOR INDE
- Address:** 12501 Greenbriar Road
- City:** Potomac
- State/Zip:** MD 20854
- Tax Id:** MD
- Cty Code:** (empty)
- Billing Name:** MD Institute For Independent Living
- Greeting:** Dear Ms. Milligan:
- C/O:** (empty)
- Address:** 12501 Greenbriar Road
- Cty/St/Zip:** Potomac, MD 20854
- Work:** (800) 555-5555
- Fax:** (800) 459-4321
- Home:** (800) 123-5555
- JPager Phone Number:** (800) 999-4231
- Credit Limit:** 1500.00
- CU.Custom Letters:** MS
- CU.Custom Numbers:** 0.00
- CU.Word Processing Code:** Y
- Customer Since:** //
- Last Activity Date:** 03/21/02
- Status:** ACTIVE
- R/C Code:** C
- Customer Type:** FULL
- Finance Charge?:** Y
- Billing Type:** Open Invoice
- Customer Category:** (dropdown menu)
- View Master Customers:** (button)
- Master Customer:** (checkbox)
- Property Grp Code:** (dropdown menu)
- Customer:** **Vendor:** **Estimate:** **Employee:**
- ID:** (input field)
- Delete:** (trash icon)



(If you get a message that says: "Cannot locate address" see the trouble shooting section)

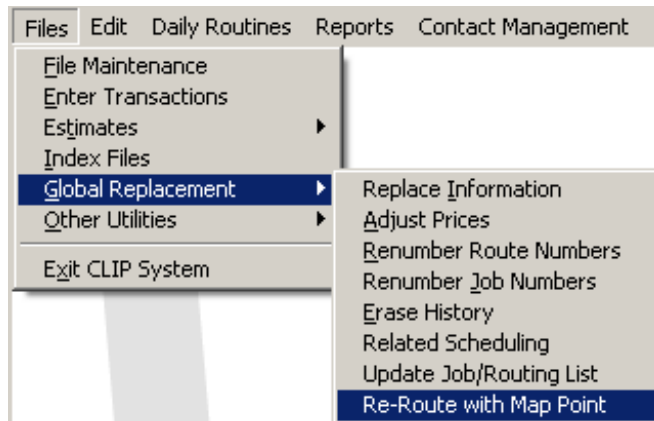
From this screen, you can print the map, zoom in or out and generally do anything that Map Point can do. CLIP remains hidden until you exit Map Point. When you Exit Map Point, it will ask you if you want to save the map. This is not necessary so you can answer "No" and you will be back directly where you were in CLIP.



2. Re-Routing all of your properties

CLIP can use Map Point to Re-Route all of your properties. This is especially useful when you are just setting CLIP up and you need to come up with Routing Sequence Numbers for all of your crews.

This function is under the Files/Global Replacements/Re-Route with Map Point



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This function is basically a three step process.

Step 1 - Set up and Filter your data base

The screenshot shows a software window titled "Reroute Route by MapPoint". The interface is organized into three main steps:

- Step # 1 - Filter Options:** Contains input fields for "Start with:" (set to 1000) and "Space out by:" (set to 10). It also has three checkboxes: "Only Active Customers" (checked), "All Crews" (unchecked, with an "Enter Crew #" field set to 0), and "All Jobs" (unchecked, with an "Only Job #" field set to 0).
- Step # 2 - Map the Route:** Contains two buttons: "Generate List" and "Re-route with MapPoint".
- Step # 3 - Check the Order and Save:** Contains two buttons: "Replace in Jobs" and "Replace in Customer Defaults".

Additional UI elements include a "Return" button with a left-pointing arrow and a help icon (?) in the top right corner.

Set up

First Enter the starting Routing Sequence number. This will be the number that CLIP starts with on the first job in the route. Some companies find it convenient to have all of their crew #1 start at 1000 and all of their crew # 2's start at 2000 and so forth.

Space out by: This defaults to 10 and that allows you to add ten numbers in between each of your jobs. We recommend that you use 10. If you find your routes are starting to get tight, you can use the Re-Number Route Numbers function to spread them out.

Filters

The filters available are:

Only Active Customers. This will only deal with customers whose status is "Active". CLIP will disregard any customers that are ON HOLD or are designated as PATTERN customers.

All Crews or Enter a Crew Number: If you want to deal with one crew at a time, use this option. Un-check the ALL CREWS and you will see a box for entering a specific crew number.

All Jobs or Only Job Number: This option allows you to only reroute a certain job number. Use this if you want to only reroute your Spring Clean Ups for example.

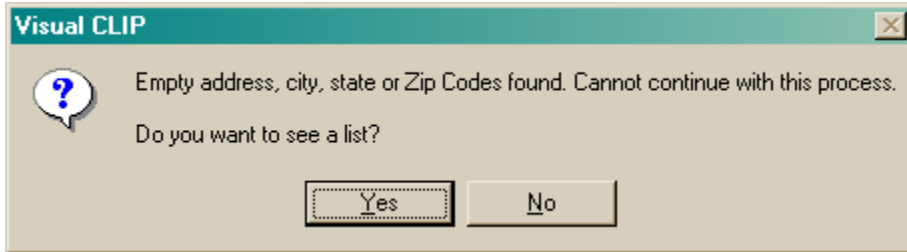
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Include Jobs on Hold: This option allows you to exclude all jobs that are currently on Hold.

Step 2 - Gather the data

The first thing you do is generate the list of jobs/customers that fit the filters. Click on the Generate List button and you will see a list of all the customers that fit the filters you have established.

If you have any empty City, State or Zip Codes, CLIP will alert you to this fact.



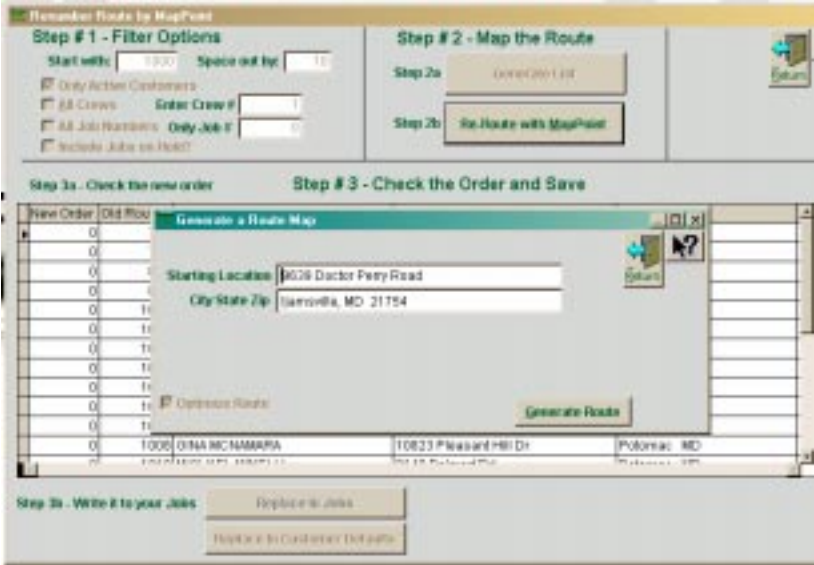
You can see the list if you desire. That way you can go back into File Maintenance and fix the records that are wrong.

You can proceed if you want to but be aware that CLIP will remove these addresses from the list so they will not be routed along with the other properties.



If you are satisfied with the list, proceed to step 2b, Rerouting with Map Point.

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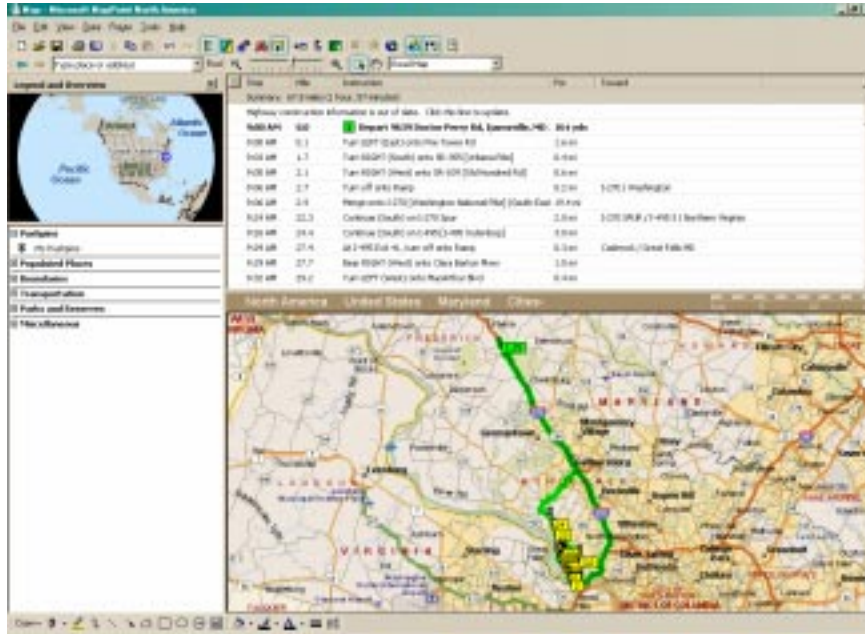
You will have to verify that the starting point is correct. The first time this screen comes up, CLIP defaults to the registered company's address. If your shop address is different from this, enter it here and CLIP will remember that from now on.



Click Generate Route to start the mapping process.

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You will now be presented with all of your properties listed in routing Optimized order. CLIP will have given these properties to Map Point starting from your shop address and returning to your shop.

You can zoom in on the route to see it more closely.

Now close out the map, you do not need to save it. Close out the Starting location screen and now you will see the new routing sequence numbers in the far left hand column.

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Renumber Route by MapPoint

Step # 1 - Filter Options

Start with: Space out by:

Only Active Customers

All Crews Enter Crew #

All Job Numbers Only Job #

Include Jobs on Hold?

Step # 2 - Map the Route

Step 2a

Step 2b

Step 3a - Check the new order **Step # 3 - Check the Order and Save**

New Order	Old Route #	Name	Address	City State
1020	780	FENN RUTH	7502 Hackamore Dr	Potomac MD
1030	1520	SMOKLER 2670 GEDDES	8080 Hackamore Dr	Potomac MD
1040	1710	SPANGLER JACK	7995 Coach St	Potomac MD
1050	1430	HERNANDEZ RAMERO	8096 Coach St	Potomac MD
1060	1390	CORNELL PETE	8503 Brickyard Rd	Potomac MD
1070	1340	KIPKA KRISTINE	8595 Horseshoe Ln	Potomac MD
1080	1140	FISCHER SUSAN	8438 Kingsgate Rd	Potomac MD
1090	1015	CHARLIE LOUGHEED	8689 Brickyard Rd	Potomac MD
1100	1013	RUTH FOLEY	9071 Brickyard Rd	Potomac MD
1110	1011	PAUL RICHARDS	11154 Bellavista Dr	Potomac MD
1120	1010	MICHAEL MINELLI	9148 Belmart Rd	Potomac MD
1130	1008	GINA MCNAMARA	10823 Pleasant Hill Dr	Potomac MD
1140	1006	ROBERT HAMILTON	10824 Pleasant Hill Dr	Potomac MD

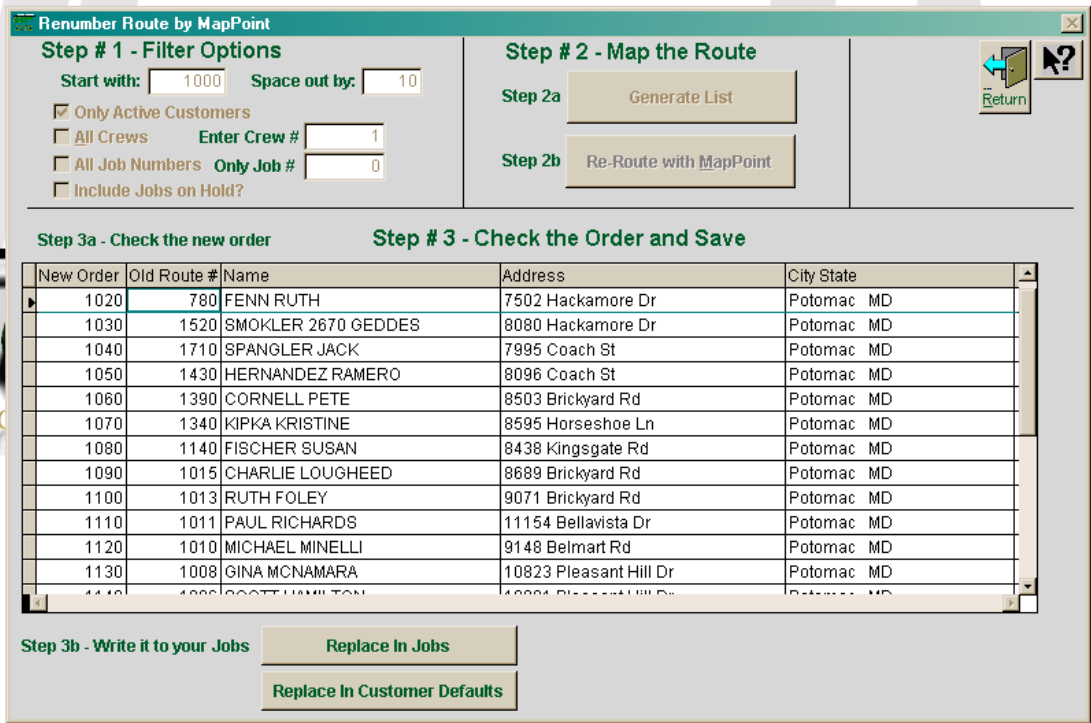
Step 3b - Write it to your Jobs

Now you can do small adjustments as needed here on this screen.

Note: you can change the order of the list by clicking on the column headings.

Step 3 - Put the data into your files

Once you have made any manual adjustments necessary, you can now tell CLIP to put the information into the data base. You have two options and you can do either or both.

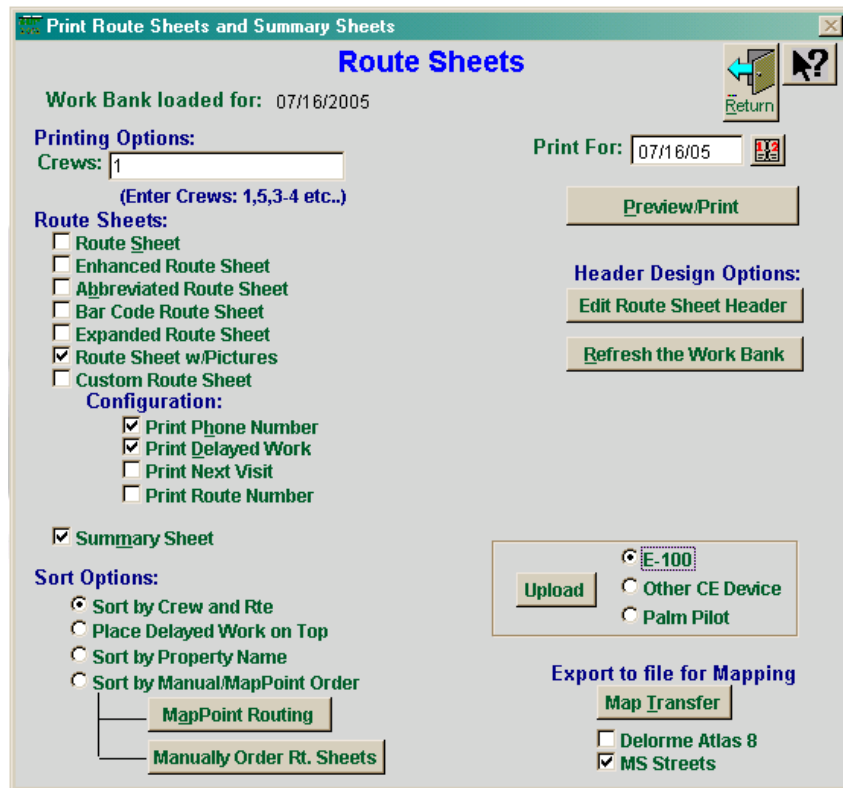


Replace in Jobs. This function will find the jobs that you have selected and to and replace the routing sequence with the new one that Map Point has generated.

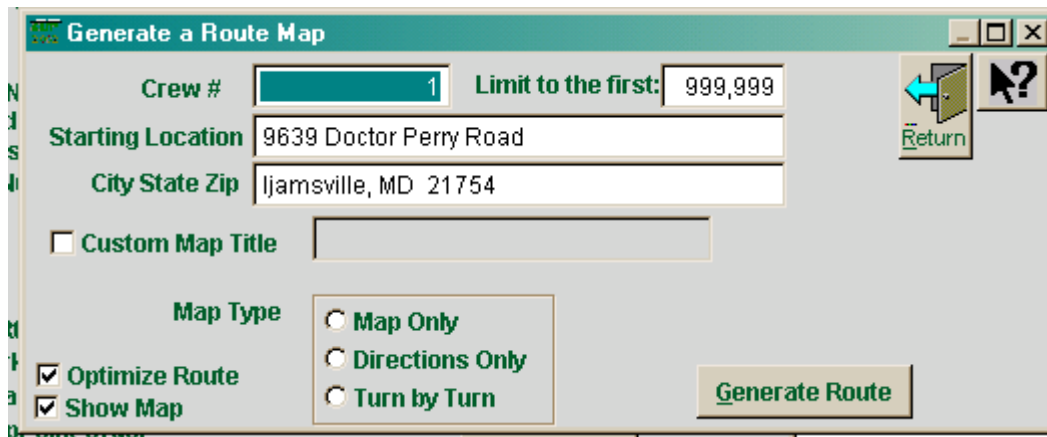
Replace in Customer Defaults. This button will tell CLIP to replace your Defaults with the new routing sequence numbers. The default sequence number will be used by CLIP for all new jobs that are added to this customer.

That is all that is necessary to reroute your customers and/or their jobs.

- 3. Re-Routing your jobs for each day's work.
 CLIP allows you to just reroute today's jobs. From the Print Route Sheets screen, press the Map Point Routing button.



Enter your starting point address and select the options you want:



Crew Number: Enter the crew number that you wish to reroute or print a map for.

Limit to next..... Enter a number if you want the map and routing to only effect the first XX number of jobs. This is useful when you have a lot more jobs than can be done in a day on a Crew's route sheet. Simply enter a quantity of jobs that you feel the crew can accomplish and Map Point will only map out those.

Custom Map Title: if you want the map's title to be your own text, enter it here.

Optimize Map: By checking this option Map Point will optimize the route for you. If you do not check this option the map will be generated much quicker

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but the route will be based on your routing sequence numbers.

Show Map: if you check this option Map Point will show you the map after it plots the course. If you want this to go directly to the printer, do check the Show Map option.

Map type:

Map Only: CLIP will only print out the map with the stops placed on the map.

Directions only: CLIP will only print out the directions from your shop to each property and back again.

Turn by Turn: CLIP will print out each turn on the map with directions and a small map showing the direction to turn.

Any addresses that are not found in Map Point will be presented in Report form and you can print them to research why Map Point was unable to find them.

Trouble Shooting Address that are not found in Map Point:

There are many reasons why Map Point will not find an address that is given to it. Most of them are simple to resolve and obvious.

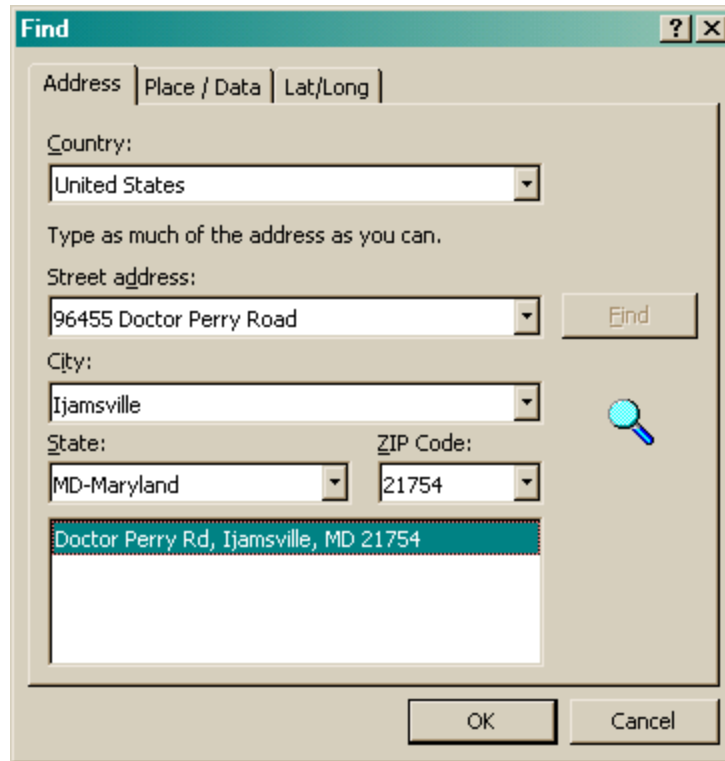
Usually, when an address is not found during one of the processes above, the best way to check it is to use the File Maintenance button. If CLIP does not find the address in Map Point, take a good look at the address. Do you have a proper state, city and zip code? Does the address have any abbreviations that might be misspelled?

We have seen addresses such as: "1401-1403 Oak Lane" This is not a valid address in Map Point and will not be located.

If the address looks right, you need to check it with Map Point.

Open Map Point and enter the address in the "Type Place or Address" area.

Enter the address EXACTLY as you have it in CLIP. Map Point will not find it and will present you with a "Find" box.



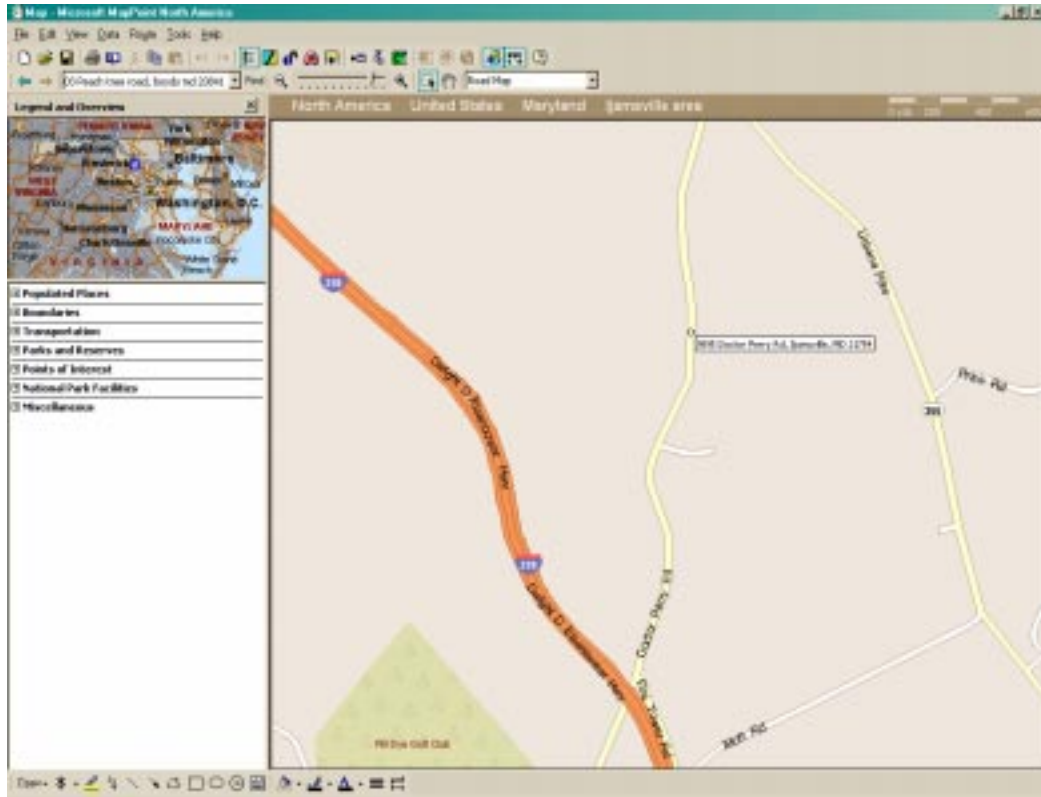
Notice that in this example, Map Point has found Doctor Perry Road but it has not found the address. You can see this because there is no "Push Pin" but only a "diamond" showing Doctor Perry Road.

Since Map Point cannot "find" this point on the map, it will return an "Address not found" to CLIP.

To find an acceptable address, you can click on the approximate place that you know the property is located at and then read the address from that.

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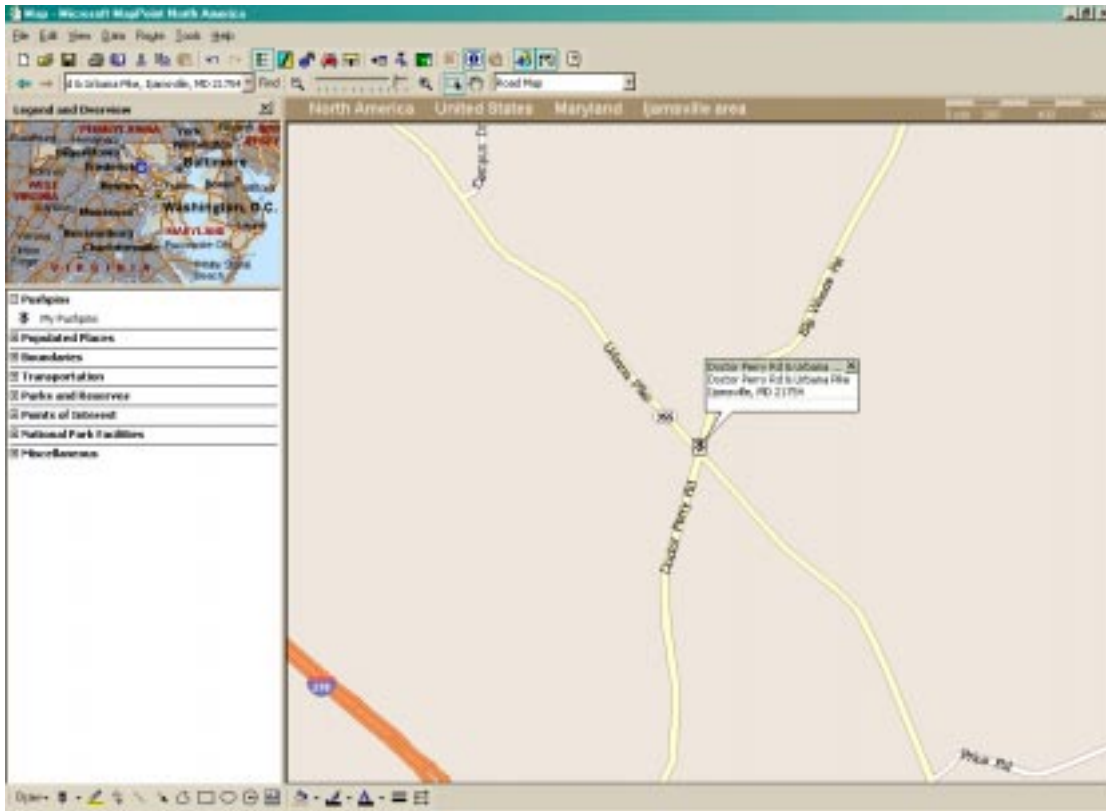
So now we change the address to "9895 Doctor Perry Road" and CLIP will find it every time.

Another acceptable address format for Map Point is a cross street.

For example, we could enter the address of "Doctor Perry & Urbana Pike, Jamsville, MD 21754" and Map Point would find it.

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If a street is not found in Map Point, you might have to give the nearest intersection in the property address area and put the real street address in the Customer Directions area.

Map Point accepts emails to help them keep their maps up to date. Pull down the Tools menu and click on the Send Feed Back.

