Billing & Scheduling Software

version 3.2.15

User Manual

Gopher Billing & Scheduling Software works with optional Palm Pilot software and barcode wand.
Order Gopher today.
To order online http://www.gophersoftware.com/register
Tech Support http://www.gophersoftware.com then click on online training.

Distribute Gopher!

Do you enjoy using Gopher? Do you know others that would enjoy it as well? You can make a commission % on each sale by following these simple instructions.

Step 1 - Contact us for information on how you can get the Gopher Point of Purchase Displays.

Step 2 - Simply place a Point Of Purchase display at the landscape equipment stores you purchase your supplies from. Hand them out to your friends. Bring them to your Landscape Association meetings. Bring them to your Landscape Industry Seminars. Rent a booth at a Landscape Show and hand them out!!!

Step 3 - Customers will see the trial software and take one home.

Step 4 - When they decide to register the software, they will call Ditech. We ask them for their unique CD identification number which lets us know this software came from your display.

Step 5 - We send you a sales commission check for each sale!

Choose from one of the three Point of Purchase Displays below. We offer a 25 unit paper envelope display. A 5 or 17 unit DVD package display. (Note: The software inside all units is the same. DVD display box does not contain a DVD.) If you need larger amounts of Gopher cds, please contact us.

Table Of Contents

1. Quick Start – Read this to get yourself up and running.	Page **4**
2. Customer	Page **22**
3. Invoice	page **40**
4. Schedule	page **55**
5. Payment	page **74**
6. Route	page **77**
7. Service	page **79**
8. Material	page **81**
9. Estimate	page **83**
10. Contract	page **87**
11. Matrix	page **94**
12. Equipment	page **104**
13. Chemical	page **109**
15. Employee	page **114**
14. Report	page **118**
15. Options	page **133**
16. Index	page **143**

Quick Start

Lets get started right away! If you haven't already done so install Gopher now. Follow these quick and easy steps to get your company up and going on our software. Afterwards look further ahead in this manual to get a more detailed understanding of the power of Gopher. Examples are included to show you how to setup more advanced operations.

Step 1. Enter your customers. Page - **5**

Step 2. Enter your services. Page - **6**

Step 3. Set up your routes. Page - **8**

Step 4. Schedule your jobs. Page - **10**

Step 5. Print your jobs. Page - **15**

Step 6. Mark your jobs completed. Page - **17**

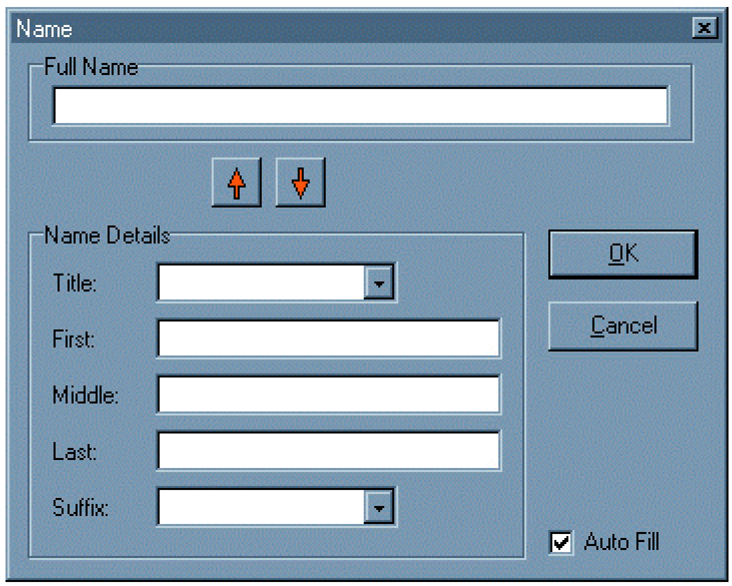
Step 7. Generate Invoices. Page - **20**

Quick Start - Step 1. Enter your customers.

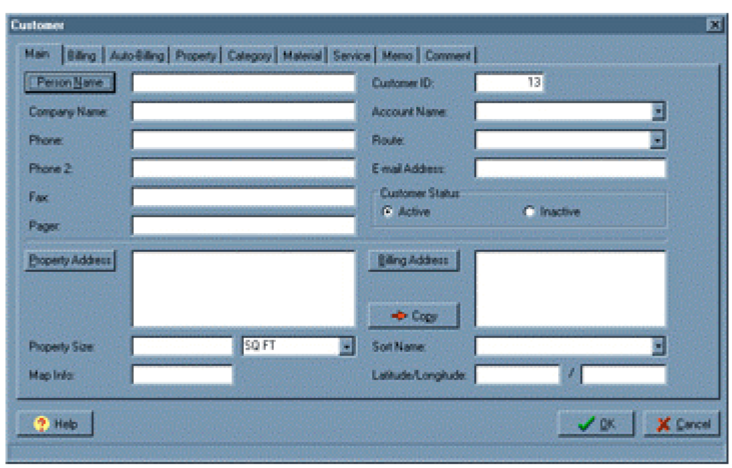
Click on the "Customer" section that runs along the green bar at the left of the screen. Click the "New" button and enter your customers. You can also import your customer database from QuickBooks. To import click on "File" at the top left of Gopher and click on "Import," then choose "Quickbooks Customer List." If you are a Gopher 98 user, you can import your customer database from that program. Click on "File" at the top left of Gopher click on "Import" then choose "Gopher 98 Entire Database."

- Click the "New" button.

- A "Name" window will appear.



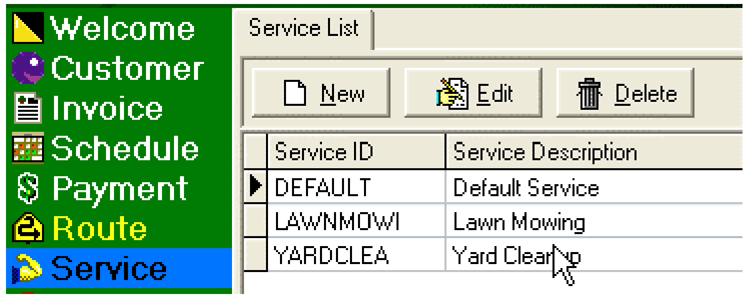
- Enter the customer's "Full Name."
- Click the "OK" button.
- A "Customer" window will appear.



- Enter the relevant customer information
- Click the "OK" button.

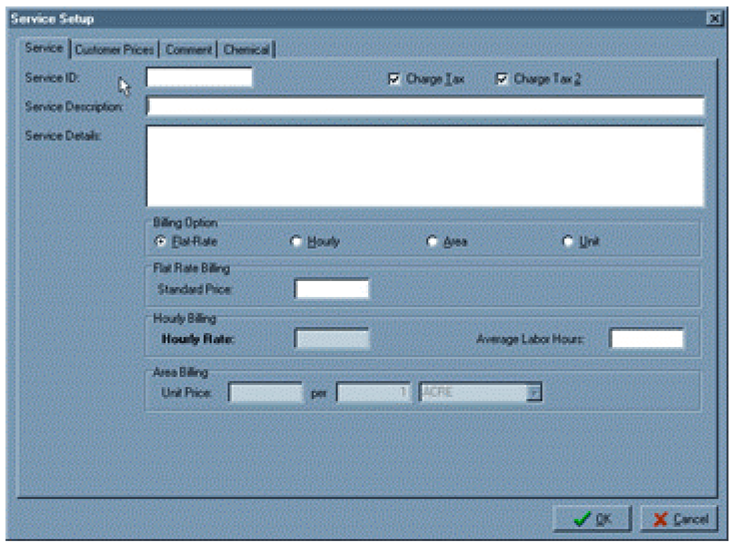
Quick Start - Step 2. Enter your services.

- Make sure you are on the tab "Service List."
- Click the "New" button.

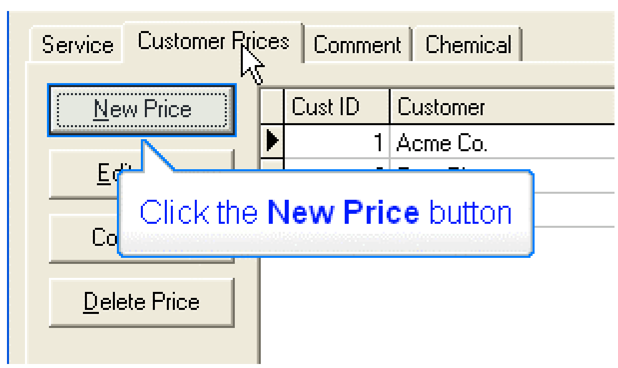


A "Service Setup" window will appear. This window has four tabs: "Service", "Customer Prices", "Comment" and " Chemical."

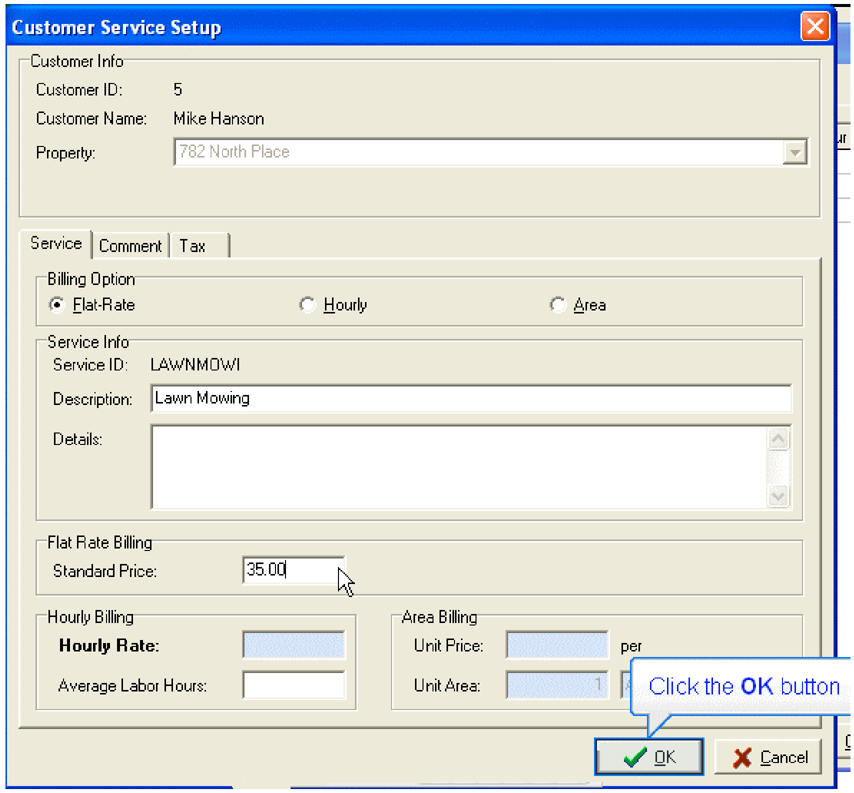
- Click on the "Service" tab.
- "Service ID" - Enter the Service ID.
- "Service Description" - Enter the description of the service.
- "Billing Option" - Choose "Flat-Rate."
- "Standard Price" - Enter the default price for this service or leave it blank.



- Click on the Customer Prices tab and click the new button.



- Here is where you will set this service's specific price for each customer.
- Click the "OK" button.



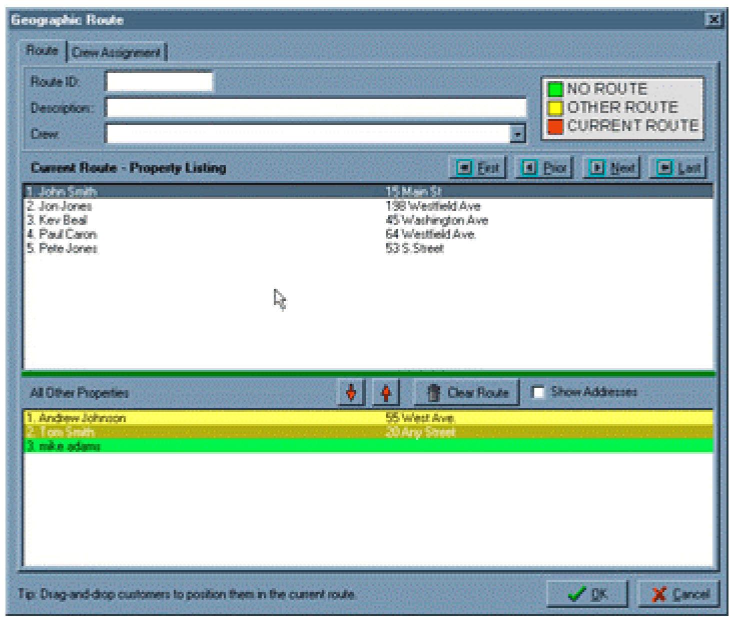
Quick Start - Step 3. Set up your routes.

Click on the "Route" section that runs along the green bar at the left of the screen.

<u>Remember:</u> The order in which your customers are set in the Route page is the order they are printed out in your daily job schedules. Order the customers as if you were going to visit one after the other straight through the entire route. Normally you will have 1 route per crew.

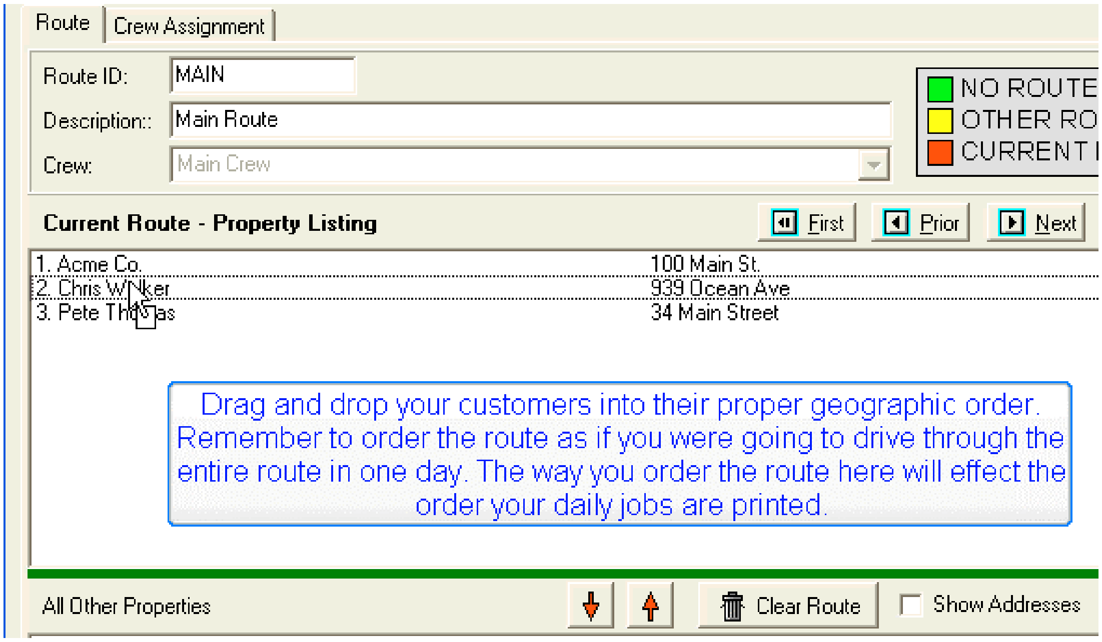
- Make sure you are on the tab "Route List."
- Click the "New" button.

- A "Geographic Route" window will appear. This window has two tabs: "Route" and "Crew Assignment."
- Click on the "Route" tab.
- "Route ID" - Enter a route ID for example: 'North Route' or 'route 1.'
- "Description" - Enter a description for this route. Ex. "northern side of town."
- "Crew" - Use the drop down box to apply a crew if applicable.
- Highlight properties from the "All Other Properties" list and use the Red Arrow buttons to move the properties up to the "Current Route" list that will be included in this route. You can also drag and drop the customers from one window to the other.



- When you have moved up all the properties that will be serviced into the "Current Route" list, use the "First", "Prior", "Next", and "Last" buttons to order the property list in geographic order.

- Or you can drag and drop the customers into their proper geographic position.



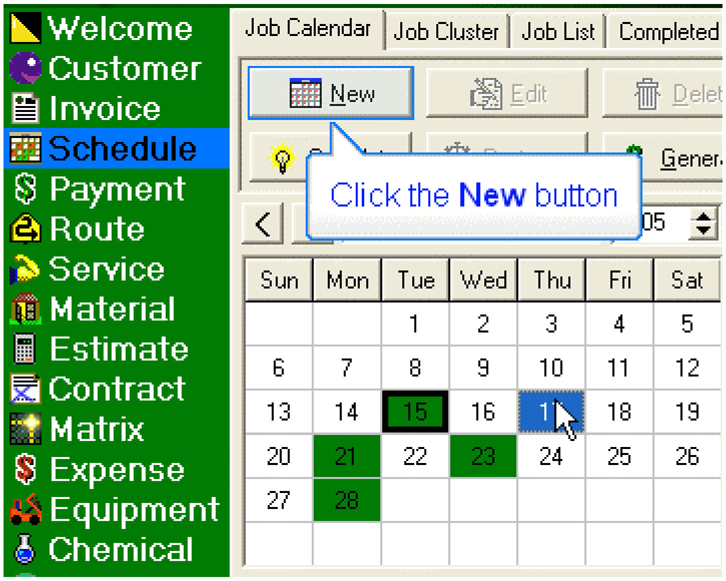
- "Clear Route" button - This will remove all the properties in the "Current Route" list.

- "Show Addresses" button - This will show the address of the properties in your list.

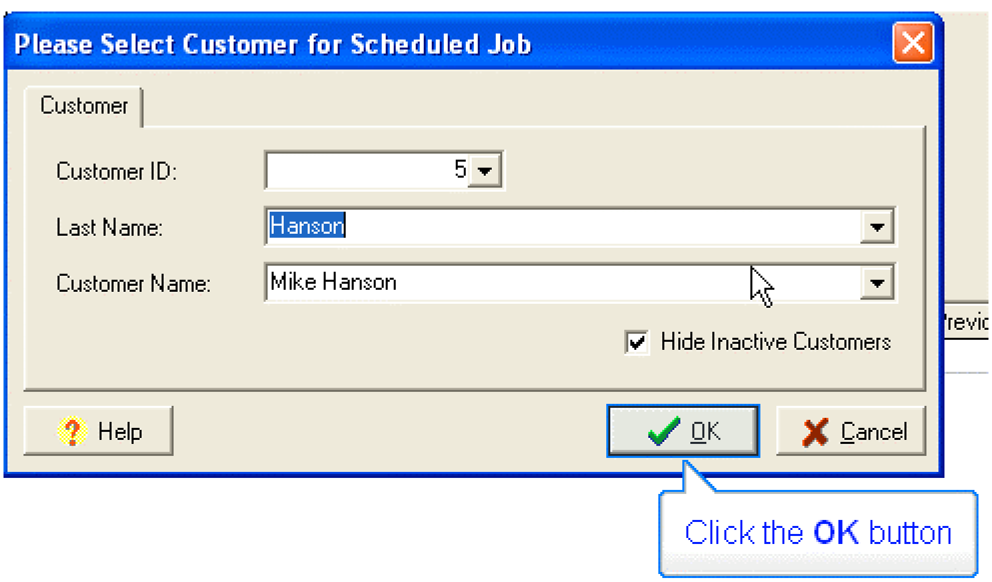
- Click the "OK" button when finished.

Quick Start - Step 4. Schedule your jobs.

- Make sure you are in the Schedule section of Gopher and on the tab "Job Calendar."
- Click the "New" button. Or use your mouse and right click on the calendar day and choose to "schedule job."

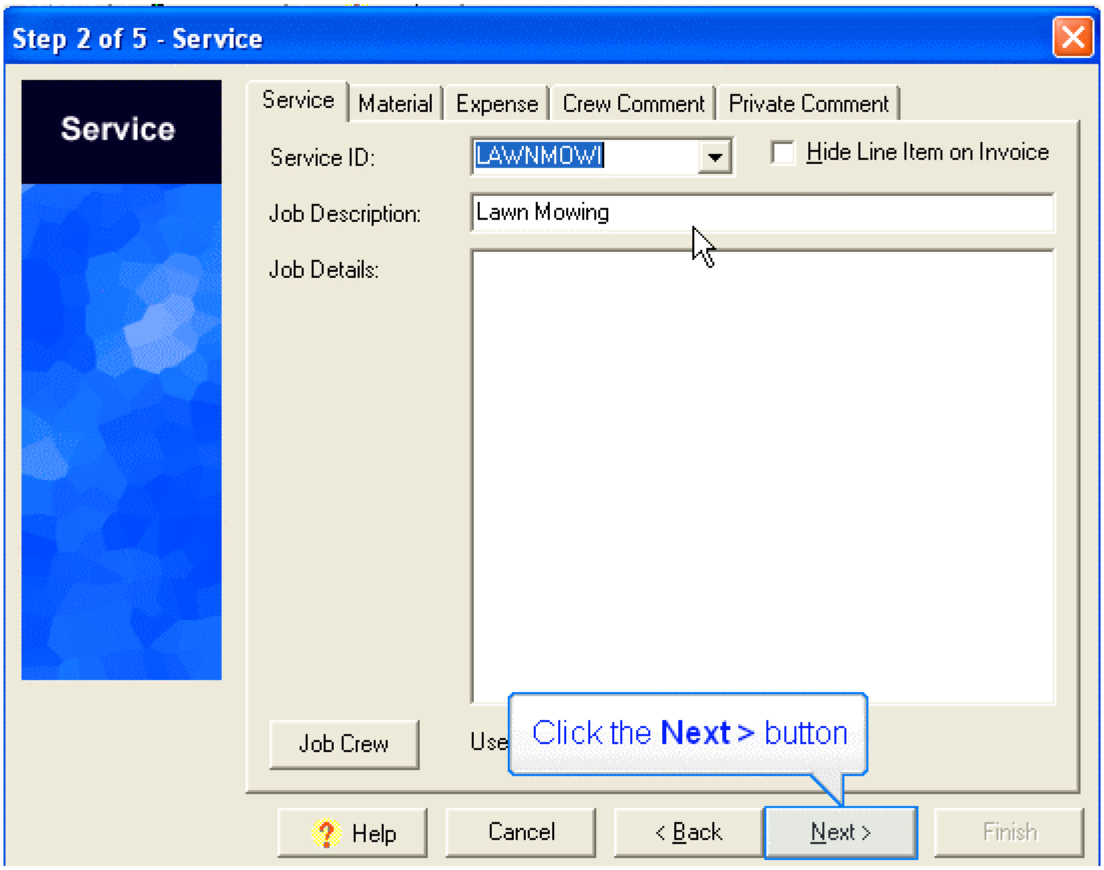


- A "Please Select Customer for Scheduled Job" window will appear.
- Use the drop down box in one of the three options to select a customer.
- Click the "OK" button.



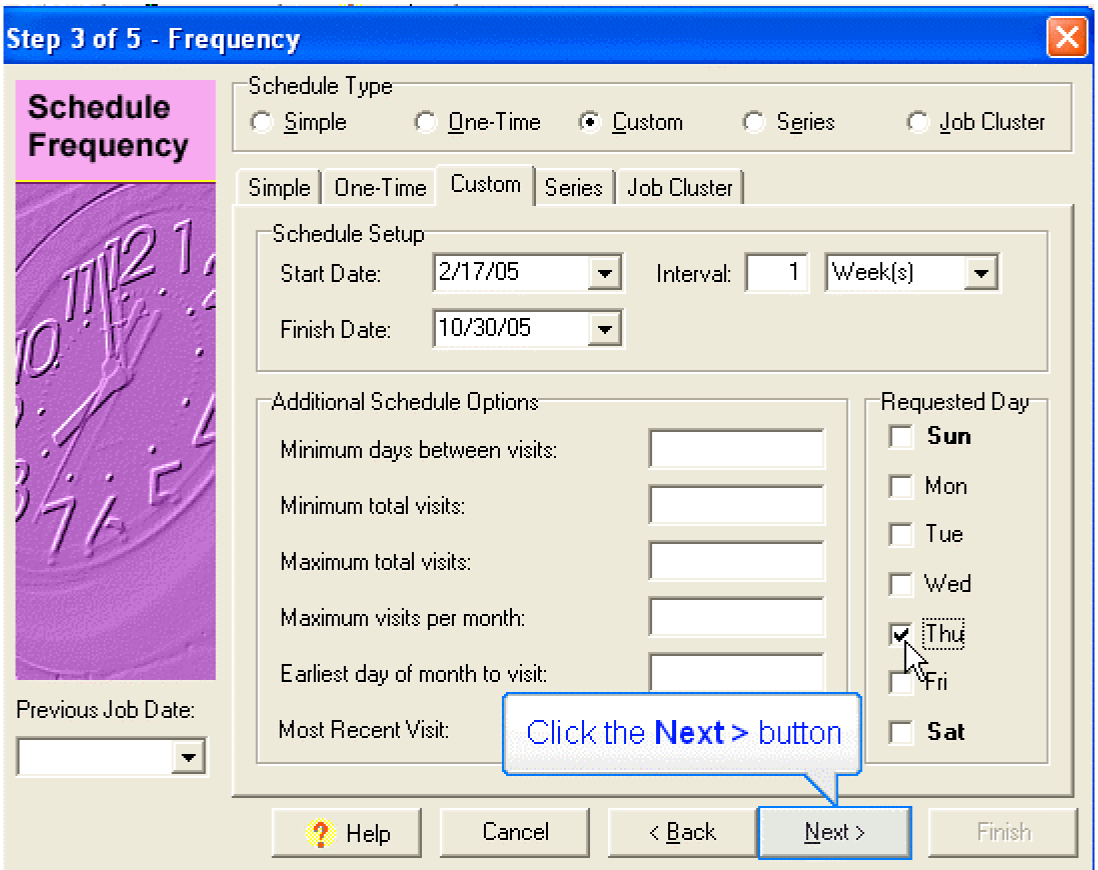
A "Service" window will appear.

- "Job Description" - Choose a service from the drop down box. The services that appear here are those you have previously entered in the "Service" page. You can also type in a service name such as Lawn Mowing.
- Click the "Next" button at the bottom of the window.



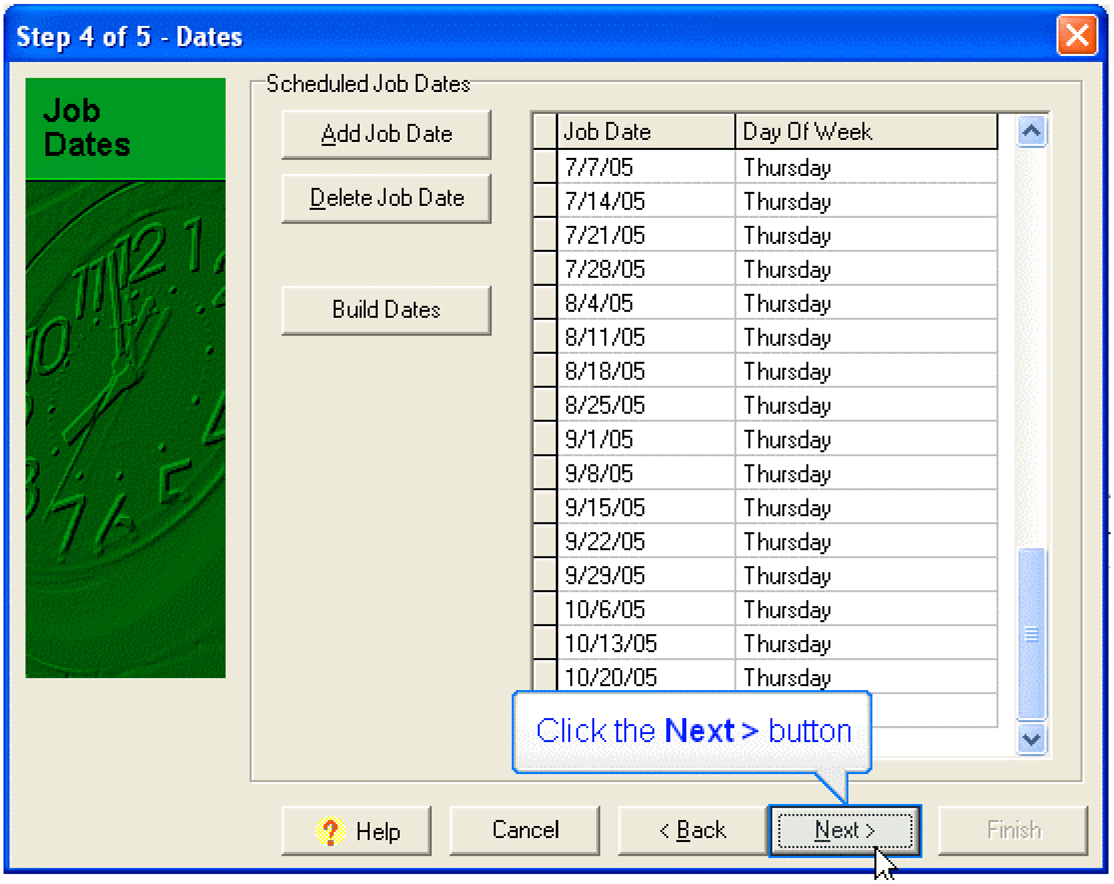
- Continue to click the "Next" button past the following windows "Equipment", "Chemical Application" until you get to the window "Frequency."

- Choose the Custom tab.
- "Interval" - If you service this lawn once a week then leave the Interval at "1 - Week(s)". If you service the lawn every two weeks then set the Interval to "2 - Week(s)". If you service the lawn once a month then set the Interval to "1 - Month(s)". If you service the lawn every ten days then set the Interval to "10 - Day(s)".
- We also set the Requested Day to Thursday.



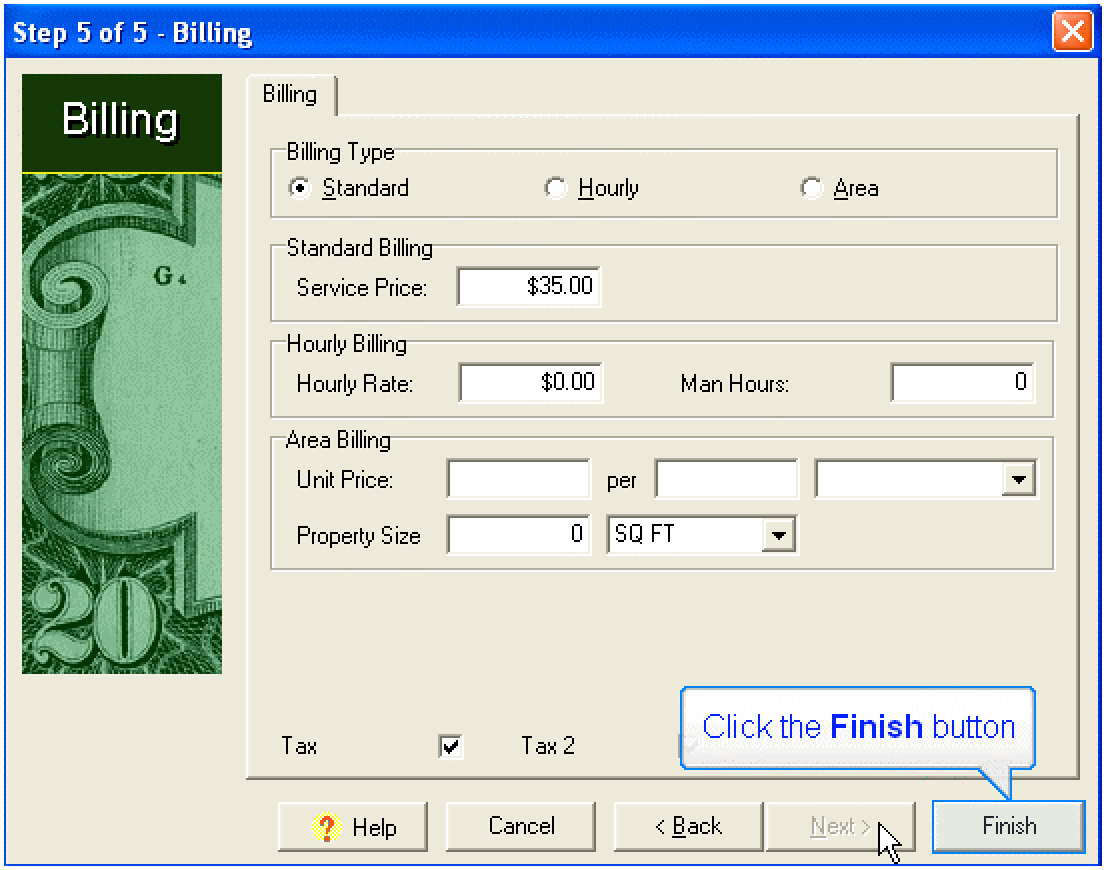
- Click the "Next" button at the bottom of the window.

- Review the Job Dates. Add or remove any dates desired



- Click the Next button.

- You should be on the "Billing" window now.
- Service Price" - Enter the fee for this service.



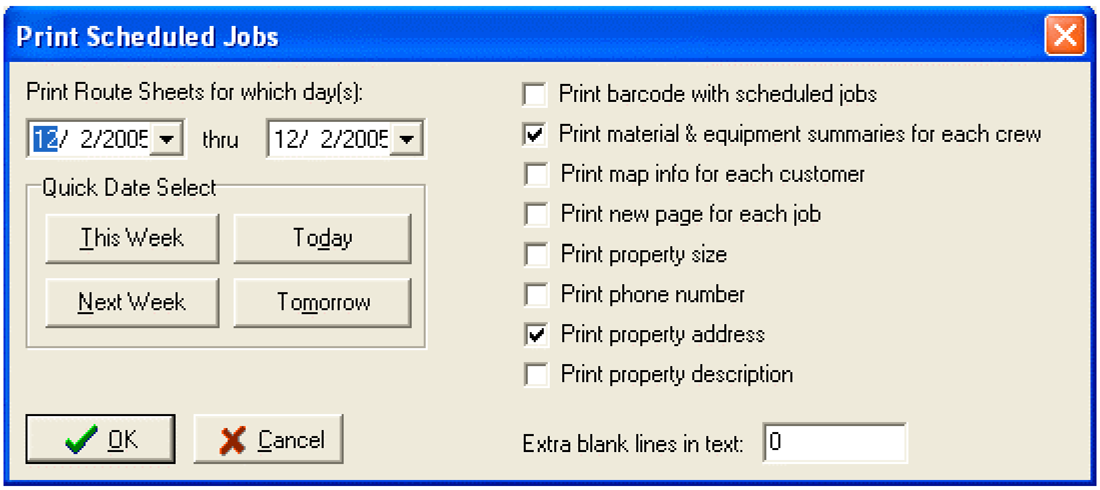
- Click the "Finished" button at the bottom of the window.

- You should now be back at the main "Schedule" page. Look at the calendar and you should see a day that is green. Click on that day and you will see the job appear in the job list below the calendar.

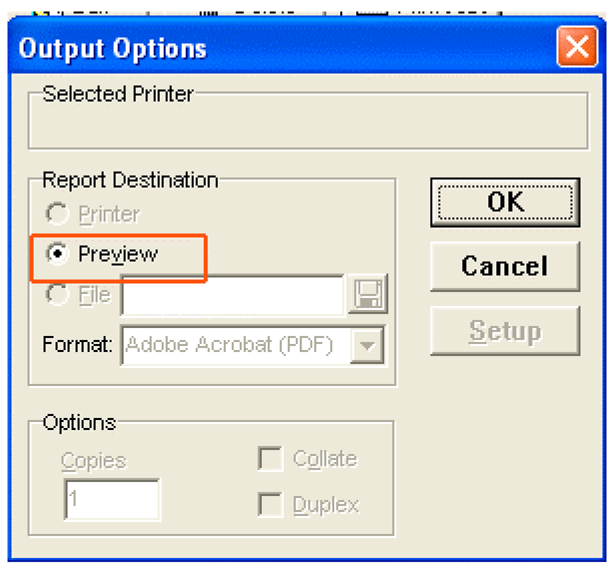
Quick Start - Step 5. Print your jobs.

- Use the "Print Jobs" button in the "Schedule" section to print out your work sheets for each day.

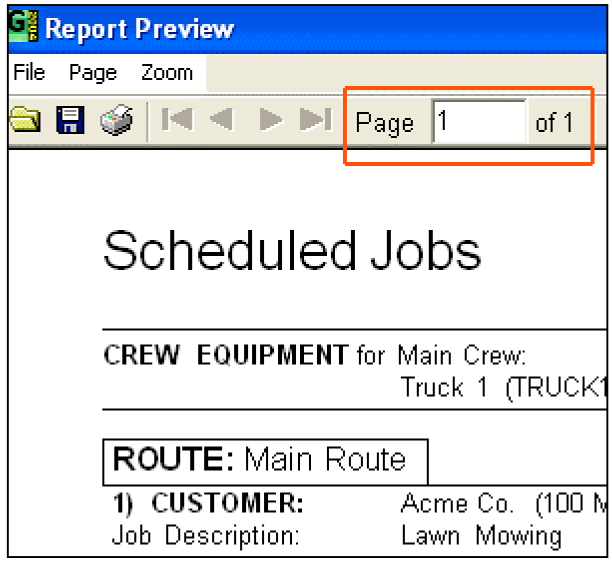
- You can also choose which options you want printed on your scheduled job reports.



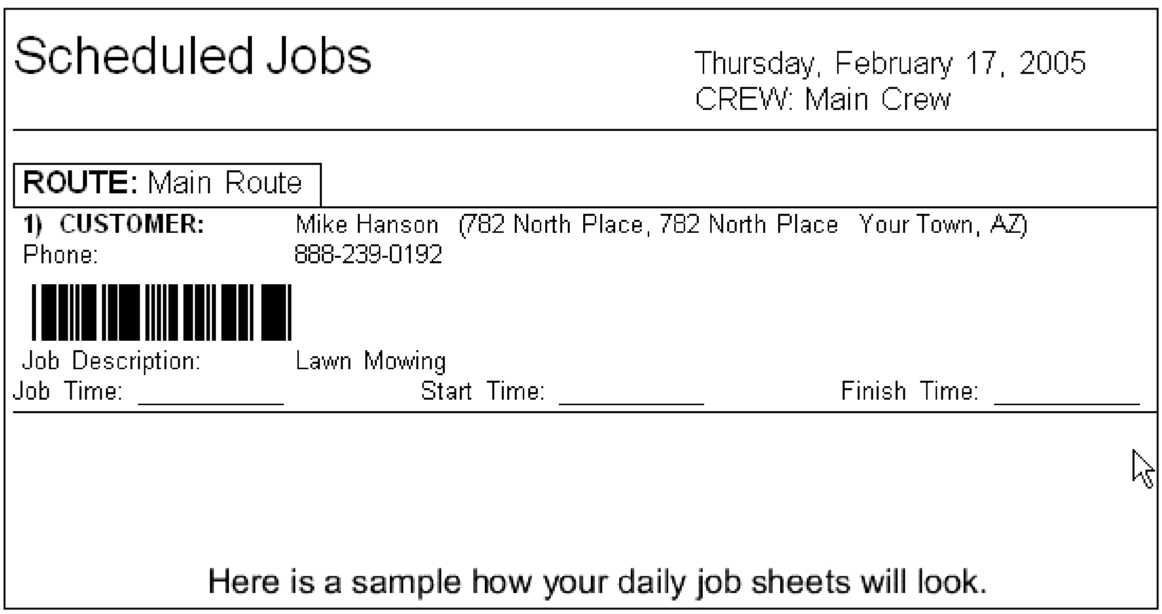
- **(Optional)** If you want to print only specific pages of your scheduled jobs, click preview.



- **(Optional)** Then choose which page you want to print out.

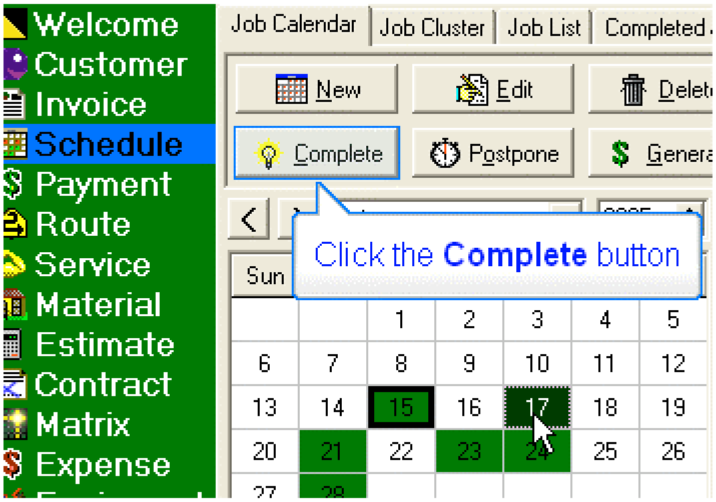


- Here is a sample of how your job sheets will look.

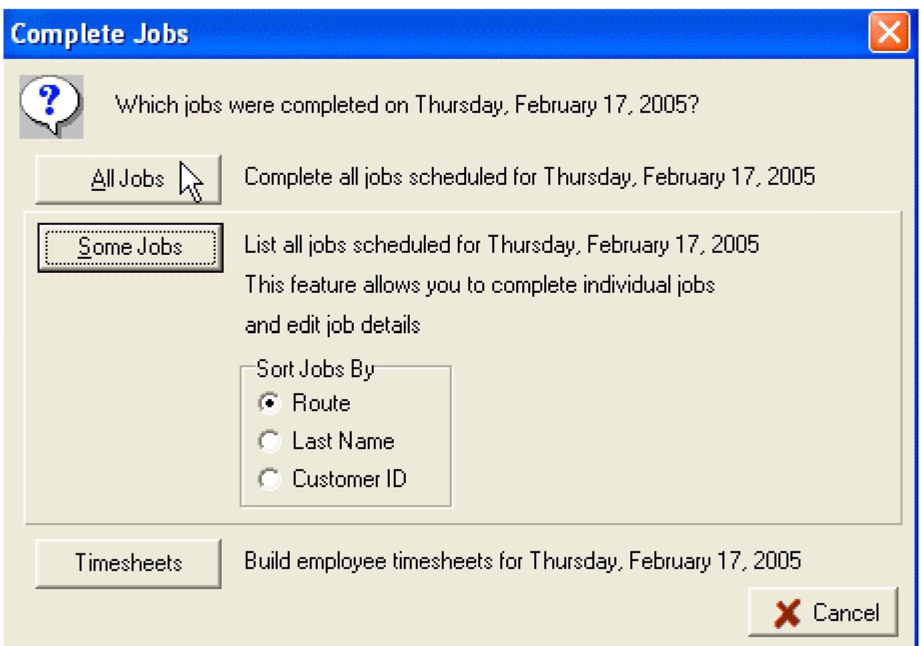


Quick Start - Step 6. Complete your jobs.

- At the end of each day highlight the calendar day by clicking on a specific job day in the calendar and then click the "
- Completed" jobs button to let Gopher know those jobs have been completed.

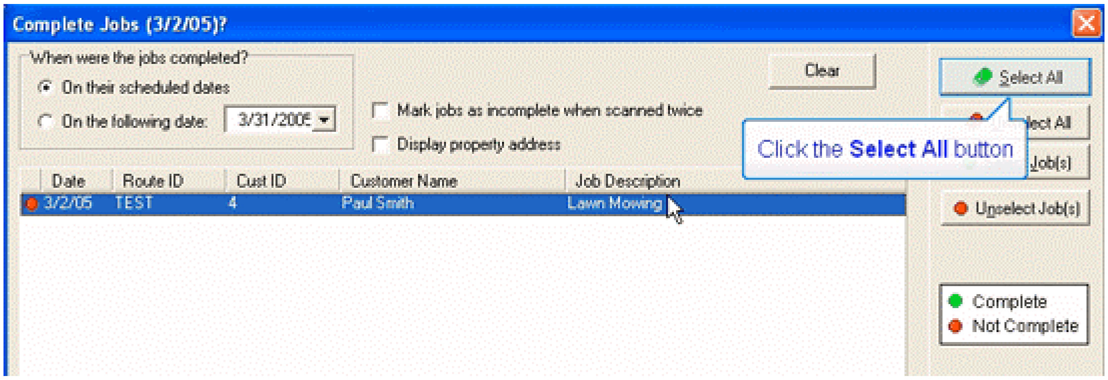


- Choose either all jobs for the day or some jobs.

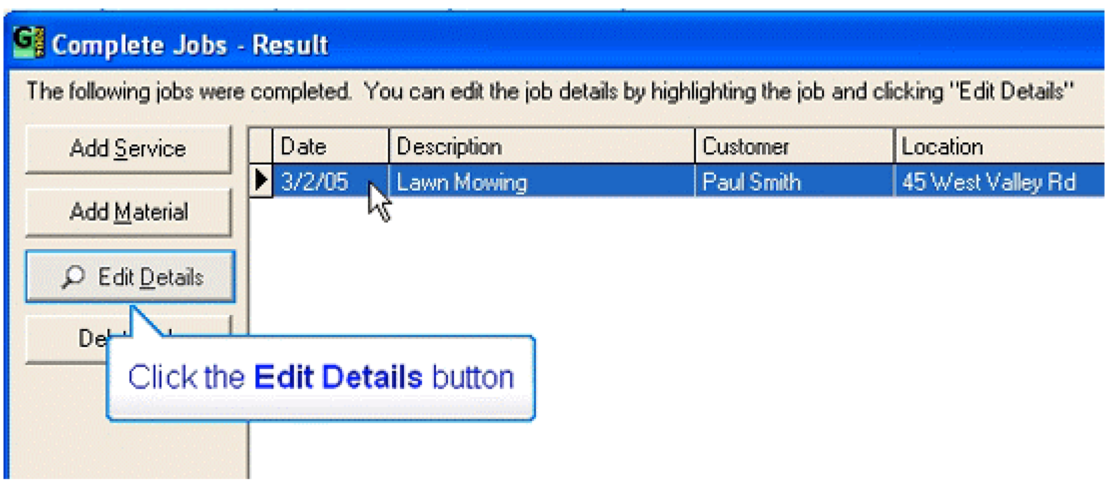


- **(Optional)** The some jobs button will allow you to enter job times.

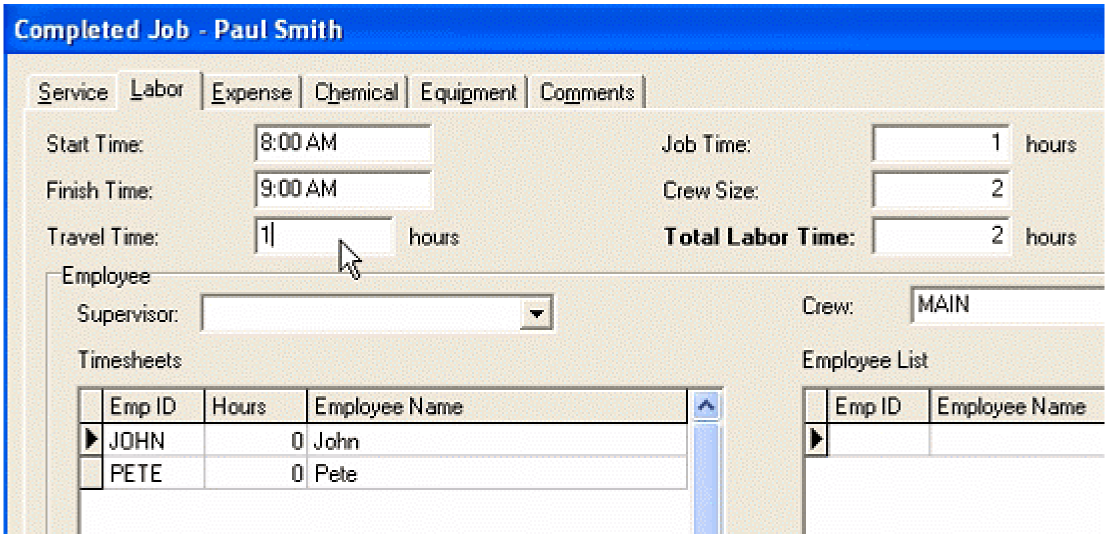
- **(Optional)** Click the Select All button. Then click the Finish button at the bottom right.



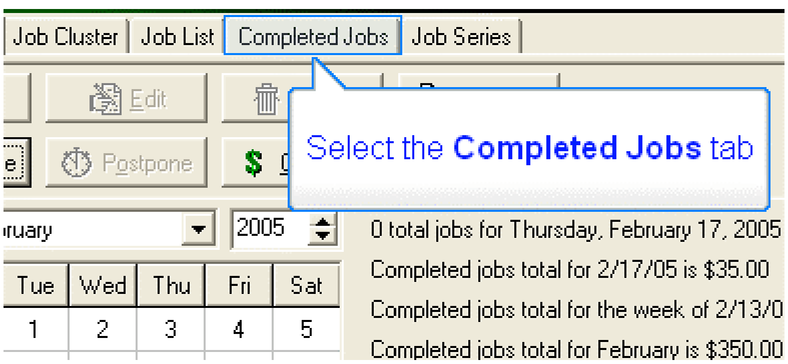
- **(Optional)** Highlight the specific job and click the Edit Details button.



- **(Optional)** Click on the Labor tab and enter the Start & Finish Time. Click OK when completed.



- To see the list of completed jobs which are awaiting to be generated into invoices, click on the Completed Jobs tab.

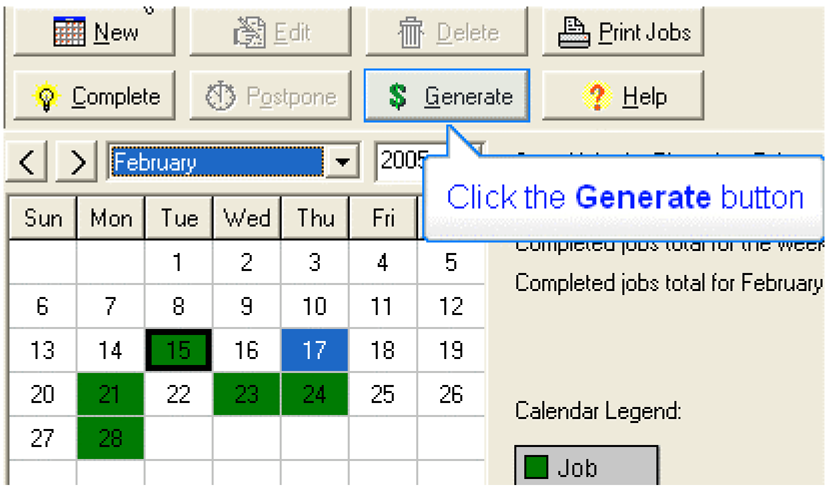


- You can also add additional jobs here that were not scheduled but you want to appear on the next invoice. For instance if while you are on a job site a customer asks you to do an additional service. When you get back to your office you can add the job here so you won't forget to bill them for it.

Quick Start - Step 7. Generate your invoices.

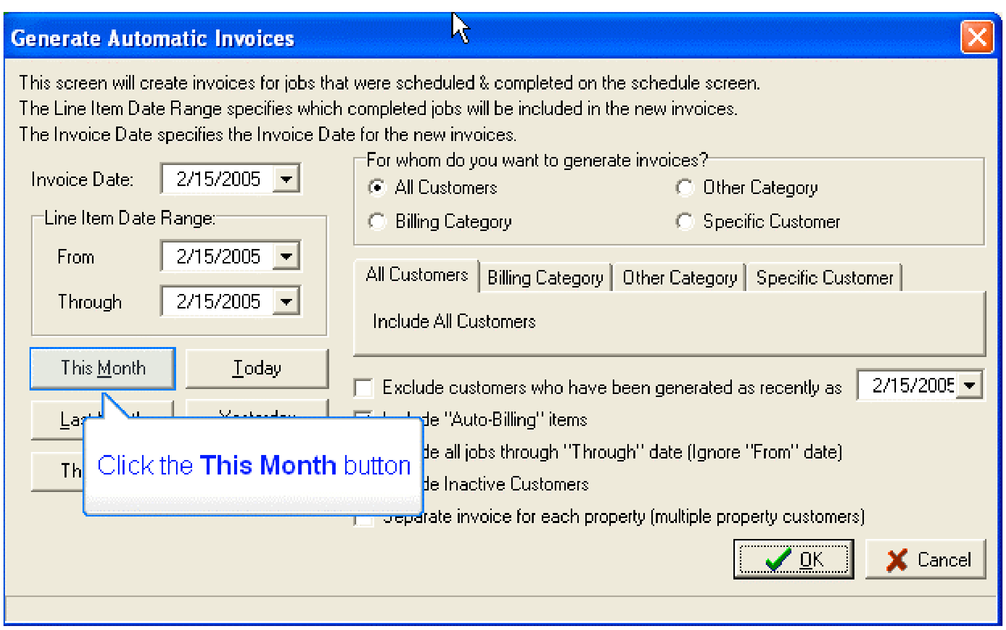
At the end of your billing cycle, click on the "Generate" button and print out all of your invoices. Generating invoices means that Gopher takes all of your completed jobs since the last time you generated and compiles them into invoices.

- First step is to be on the schedule page and click on the Generate button.

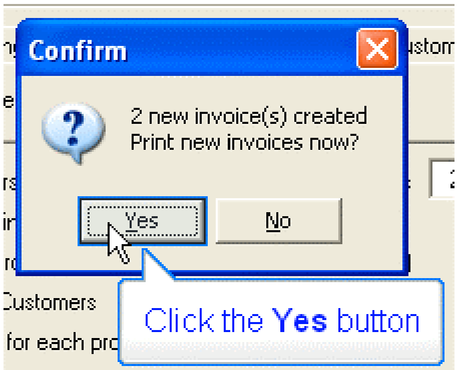


Remember: If you send out your invoices once a month at the end of the month, only generate your invoices once at the end of the month.

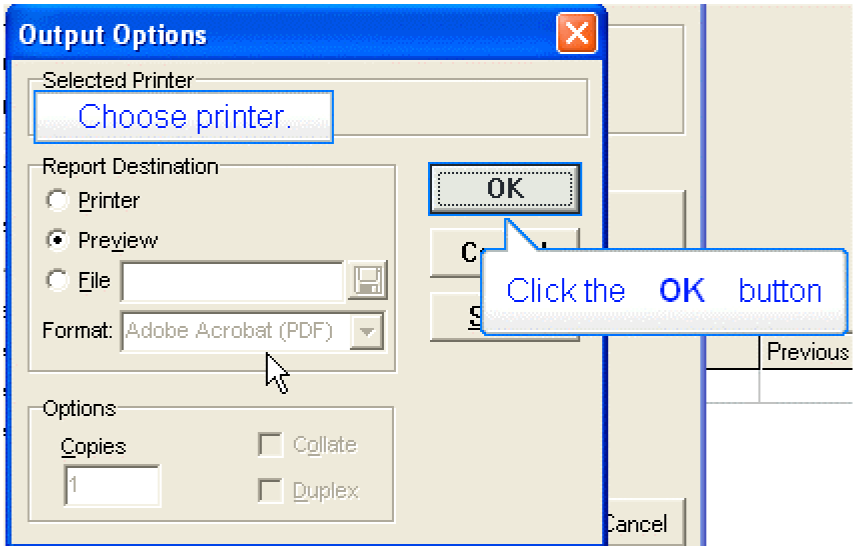
- In this example we are going to generate our invoices for the month.



- Invoice Date is the date that will appear on the top of your invoice. You can set this to whatever you want. Line item date range determines which completed jobs will be included in this invoice.
- Click ok when ready.
- If you had completed jobs for the correctly set a line item date range and customers chosen, you will see this confirmation window, otherwise recheck your settings.



- You can then print out your invoices.



Here is a hint: If you would like to print an invoice to a pdf file, choose Report Destination of file, then choose the pdf option. You can then email your customers their invoices by attaching the pdf file in the email you send.

That's it! Simple and easy! If you want to find out more about the power of Gopher, please read on. You will be amazed at what Gopher can do for you.

Customer

The Customer section of Gopher allows to to access customer records. It has three tabs across the top "Customer List," "Memo List," and "Customer Categories."

Let us now look at the first tab, "Customer List." The "Customer List" tab allows you to enter information on each of your customers. You will see database navigation buttons at top. Use the New, Edit, and Delete buttons to operate your customer database. At the bottom of the screen

you will see the "Sort Customer List By" drop down box. Use this to sort your customer list in a variety of ways.

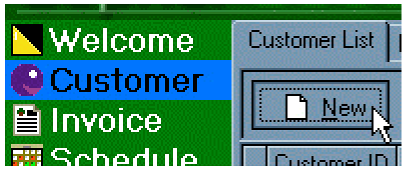
Frequently Ask Questions for the customer section.

- Entering a new customer? Page - **23**
- How do I use Auto-Billing? Page - **24**
- Setting a customer's payment terms. Page - **26**
- Adding multiple properties to a customer's account. Page - **27**
- How to print a customer list. Page - **121**
- I don't want to see inactive customers in my customer section. Page - **28**
- How to enter an initial balance here. Page - **29**
- How to export a list of ACTIVE customers to a text file for use with Microsoft mail merge. Page - **30**
- How would I would set up my customer categories to generate invoices for some of my customers daily and others monthly. Page - **31**
- I would like to use customer categories to generate invoices only for my snowplow customers. Page - **36**
- Where to place crew comments, for scheduled jobs? Page - **38**
- How do I set up my customer's sales tax regions? **138**
- How can I print mailing labels. Page - **132**

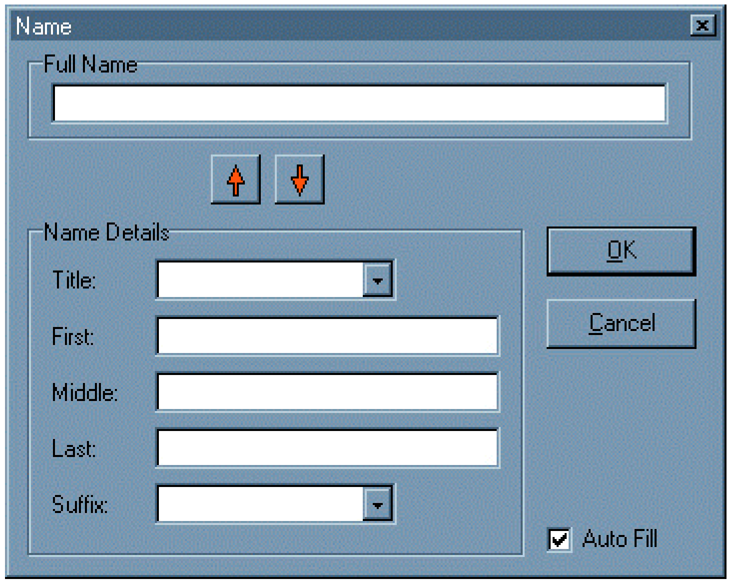
Customer - Entering a new customer

Ex. Entering a new customer

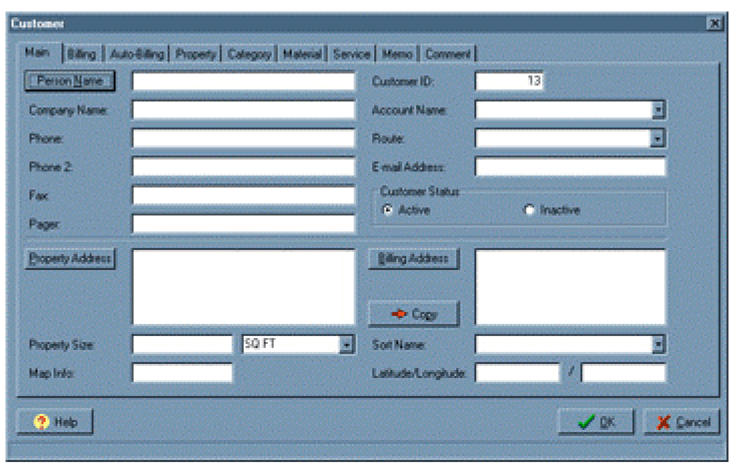
- Click the "New" button.



- A "Name" window will appear.



- Enter the customer's "Full Name."
- Click the "OK" button.
- A "Customer" window will appear.

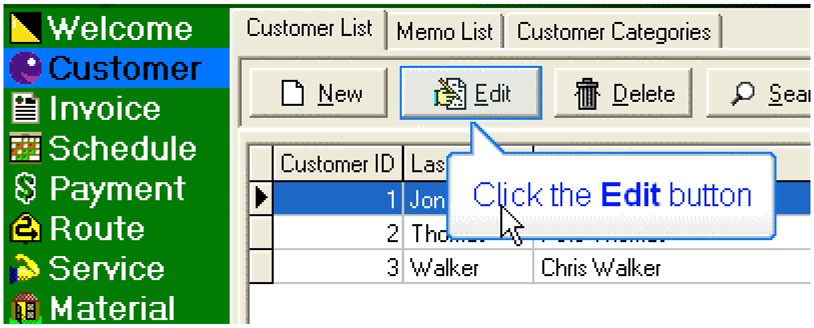


- Enter the relevant customer information
- Click the "OK" button.

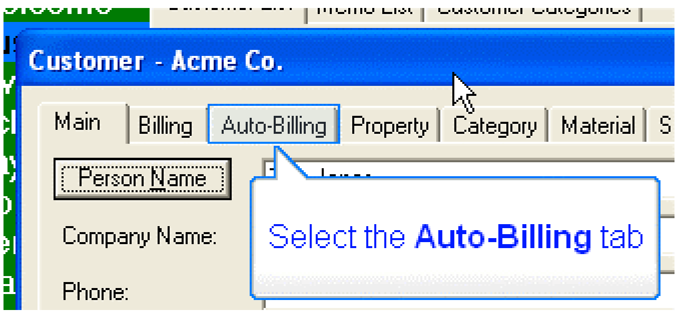
Customer - How do I use Auto-Billing?

This page allows you to enter a line item that will appear on the customer's invoice every time you generate your invoices. When you generate your invoices, you have the ability to not include "Auto Billing Items." Auto-Billing is similar to the Contract feature except that the Auto-Billing feature has no begin and end date associated with it.

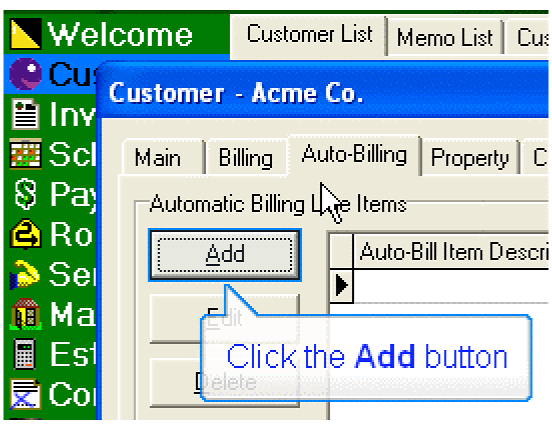
- Make sure you are on the Customer page. Choose a customer and click the edit button.



- Then choose the Auto-Billing tab.

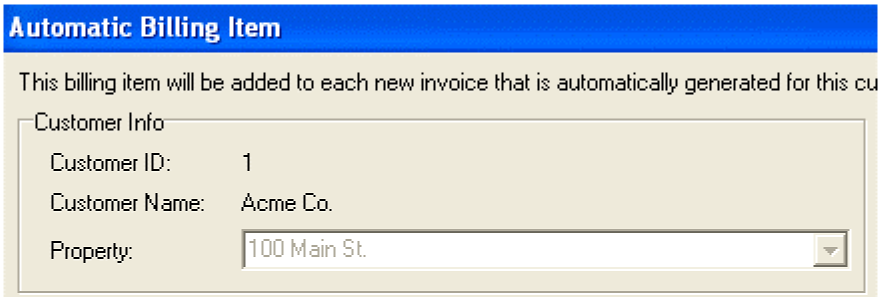


- Click the "Add" button to add an "Auto Billing Item" such as a flat monthly maintenance fee that you charge the customer every month.

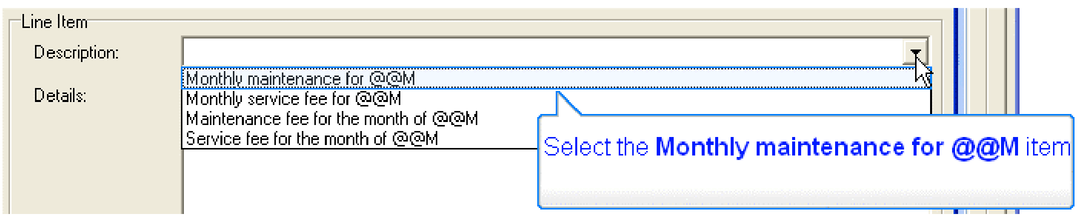


Customer - How do I use Auto-Billing?

- If the customer has multiple properties, choose which property in the drop down box this auto-billing item is for.

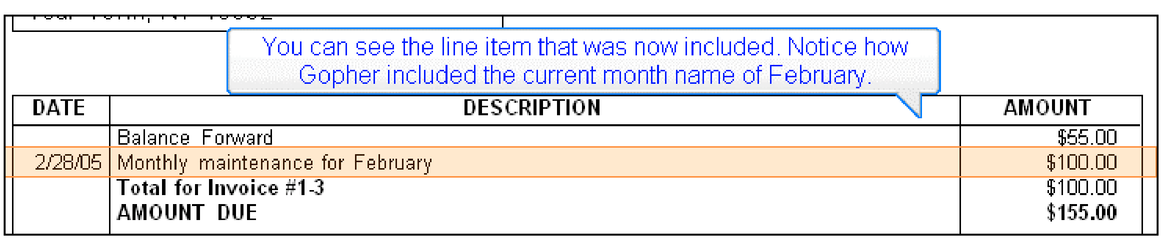


- Then choose a default "Description" that will appear as a line item in the invoice or create you own by typing one in. In this example we will want our invoice line item description to say "Monthly maintenance for February". Gopher will change the month name automatically each month.



- You may use the "Special Fields" in your description that will allow you to have control which date appears on the line item. Why would you do this? Say for instance you send out your bills at the end of the month for the next month's service. So you want your line item to say Monthly maintenance for March, when you are generating your invoices in February. Use the @@N special field. This will tell Gopher to put in next month's date in the line item description.

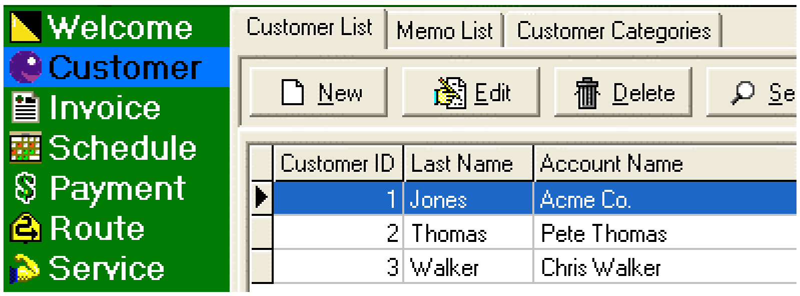
- @@M in the description will be replaced with the current month name, @@P with the previous month name and @@N with the next month name.
- ·The "Details" entry field allows you to enter a more in depth description about this specific item. The "Details" description will appear under "Description" line item.
- Enter a price and choose if this line item is taxable or not.
- At the end of the month when you generate your invoices, this is how your invoice will look with this auto-billing item.



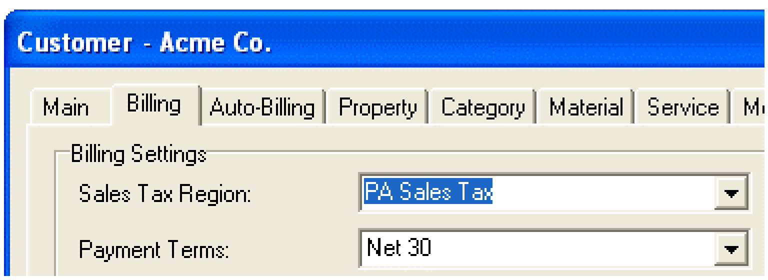
Customer - Setting a customer's payment terms.

To change the default payment terms for all customers use the settings in the option page located here.

- To review a specific customer's payment terms, make sure you are on the customer section. Choose a customer and click the edit button.

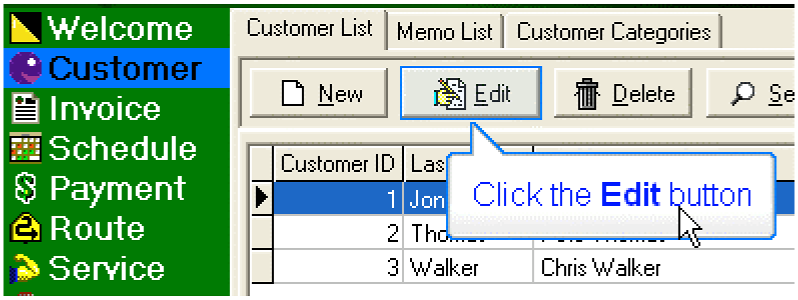


- Click on the billing tab and then choose the desired payment term in the drop down box. When finished click ok.

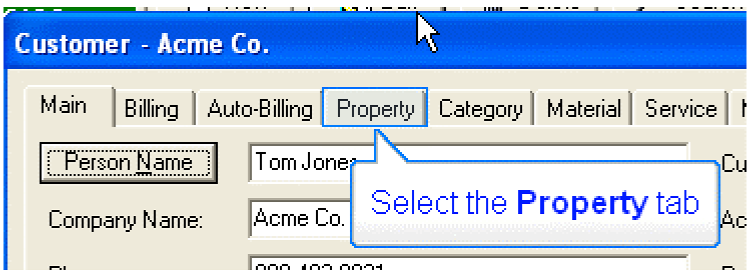


Customer - Adding multiple properties to a customer's account.

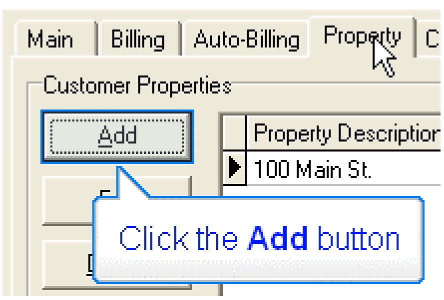
- To add multiple properties to a customer's account, make sure you are on the customer section. Choose a specific customer and click on the edit button.



- Select the property tab.



- To add a property click on the add button.



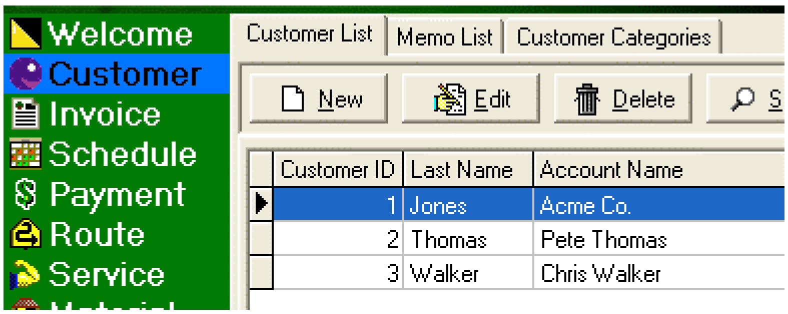
- This section allows you to enter multiple property addresses that you may service for the same customer.
- On top you will see two tabs: "Property" and "Comments."
- The "Property" tab allows you to enter in another property that is serviced for this customer.
- The "Comments" tab allows you to enter in "Private Comments" that are for your viewing only as well as a "Crew Comment" which will be printed on the crew's daily job schedule list.

Customer - Active or Inactive setting.

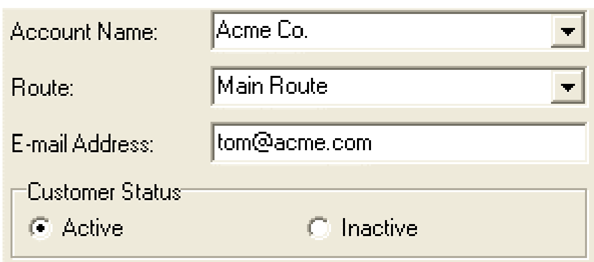
- If you would like to not see inactive customers in your customer section follow these steps.

- When would you have a customer marked inactive? Maybe if you did a one time job for them and you don't plan on doing anything further with them. Or the customer moves etc. You just might want to only see active customers in your customer list.

- Select a customer and click the edit button.



- Set this customer to active or inactive.

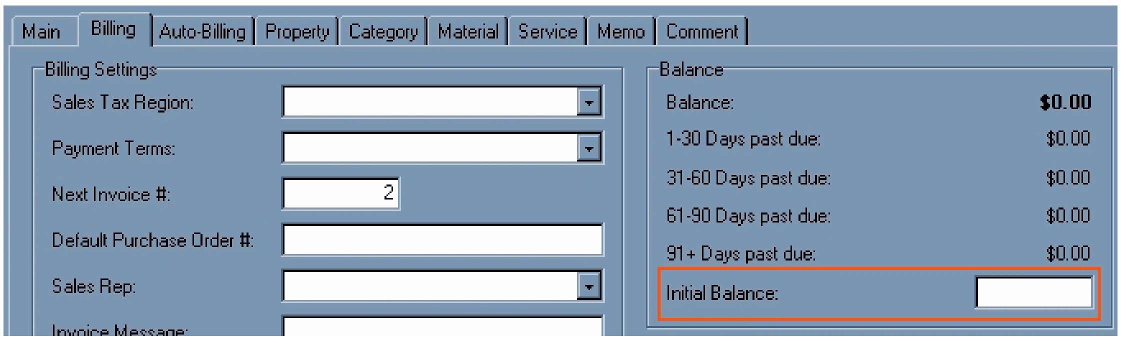


- Click Ok when completed.

- Back on the customer page at the top. Click on the check box that says Hide Inactive customers. You will no longer see inactive customers in your customer list.

Customer - How to enter an initial balance.

- When you are entering your new customers into Gopher, you may want to include an initial balance.
- To do this make sure you are on the customer section.
- Click new to enter a new customer or highlight a specific customer and click the edit button.
- Choose the billing tab at top.
- Enter the initial balance in the section marked initial balance.

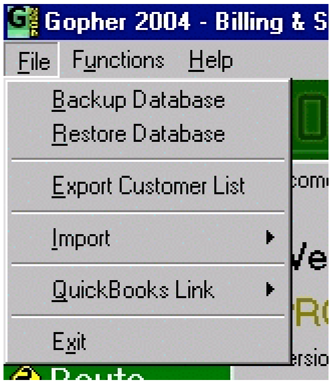


- The initial balance will then appear on the customer's invoice.

DATE	DESCRIPTION	AMOUNT
6/20/04	**Beginning Balance**	**$100.00**
	Total	**$0.00**
7/20/04	**Ending Balance**	**$100.00**

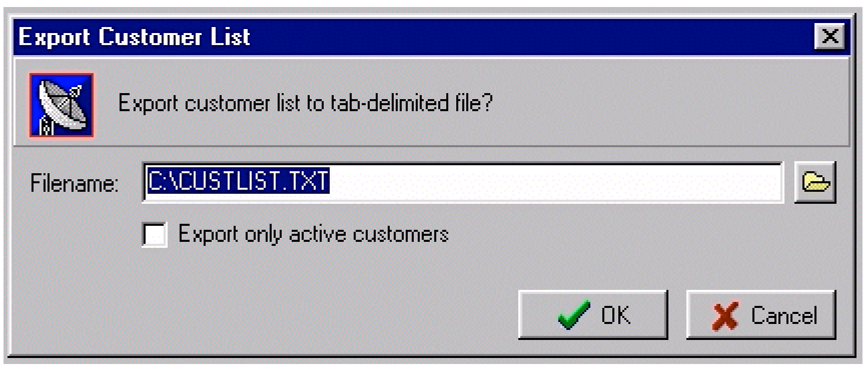
Customer - How to export a list of ACTIVE customers.

- To export your customer list into a tab delimited file, click on File at the top left of the screen.



- Choose Export Customer List.

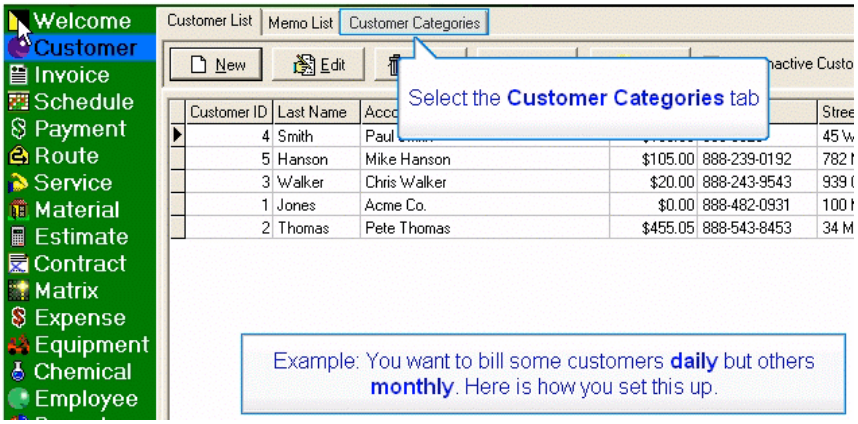
- If you want to export a customer list of only ACTIVE customers, click on the check box Export only active customers.



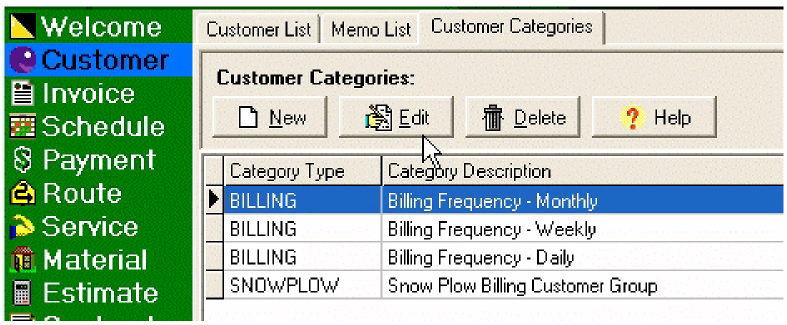
Customer - How to set up customer categories for daily and monthly billing.

If you have some clients that you want to generate invoices for daily and others that you want to generate invoices for monthly. Please follow this example.

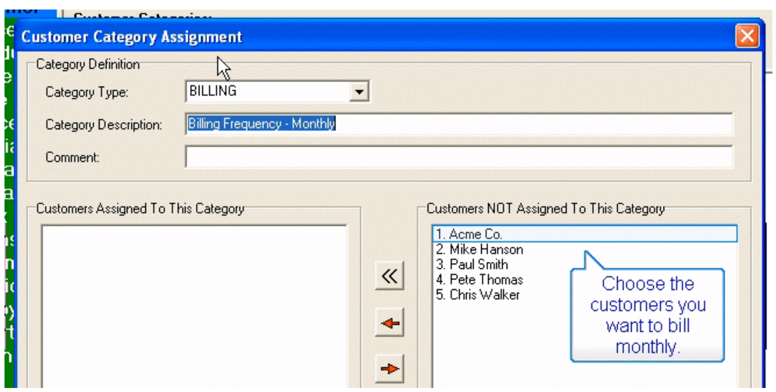
- Step 1. Make sure you are on the customer page and choose the top customer categories tab.



- Step 2. Let's choose our monthly billing customers first. Highlight Monthly Billing Frequency and click the Edit button.

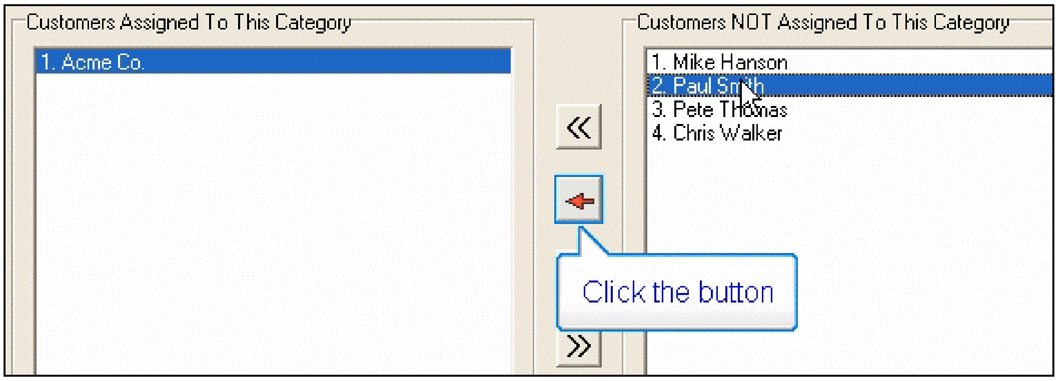


- Step 3. Choose the customers that will be billed monthly and move them from the lower right window to the lower left window. Use the middle arrow buttons or drag and drop them.

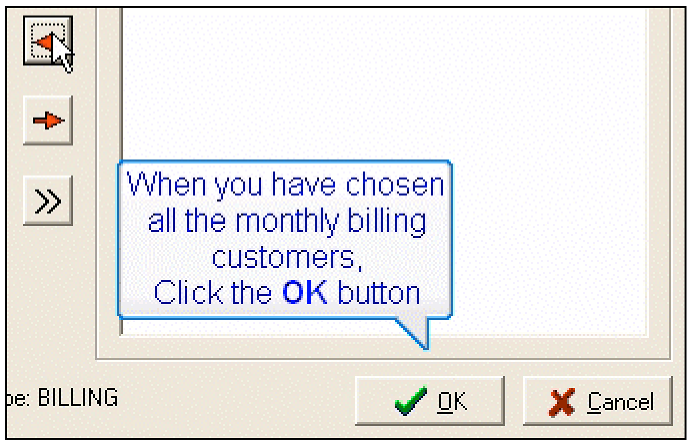


Customer - How to set up customer categories for daily and monthly billing.

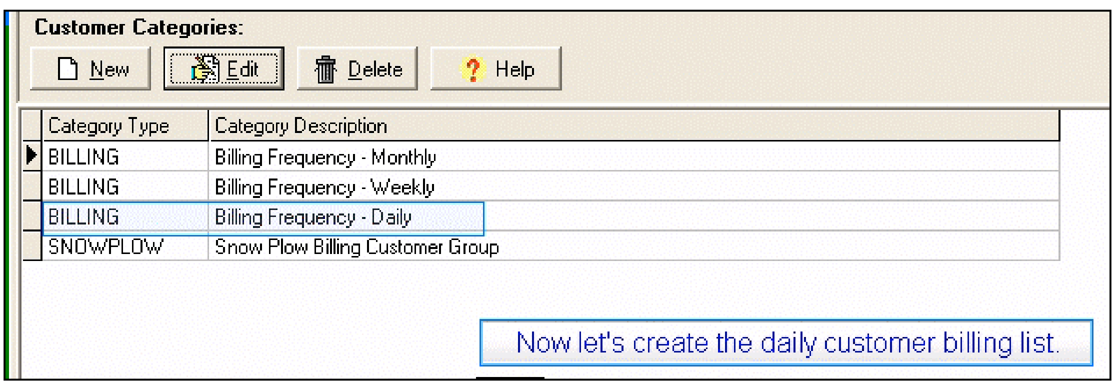
- Step 4. You can see we have moved a monthly billing customer over into this category by using the middle arrow buttons.



- Step 5. Click the OK button when you have moved all of your monthly customers into this category.

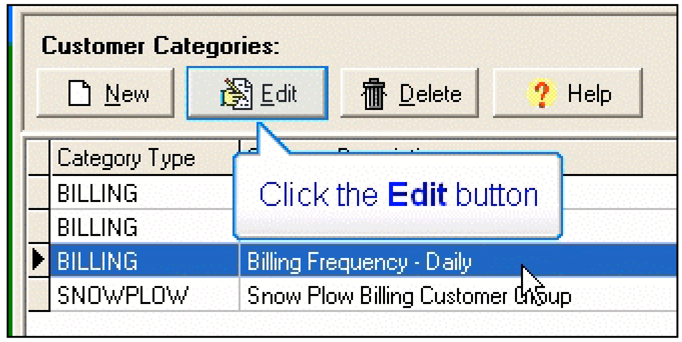


- Step 6. Now lets repeat this process for the Daily Billing customers.

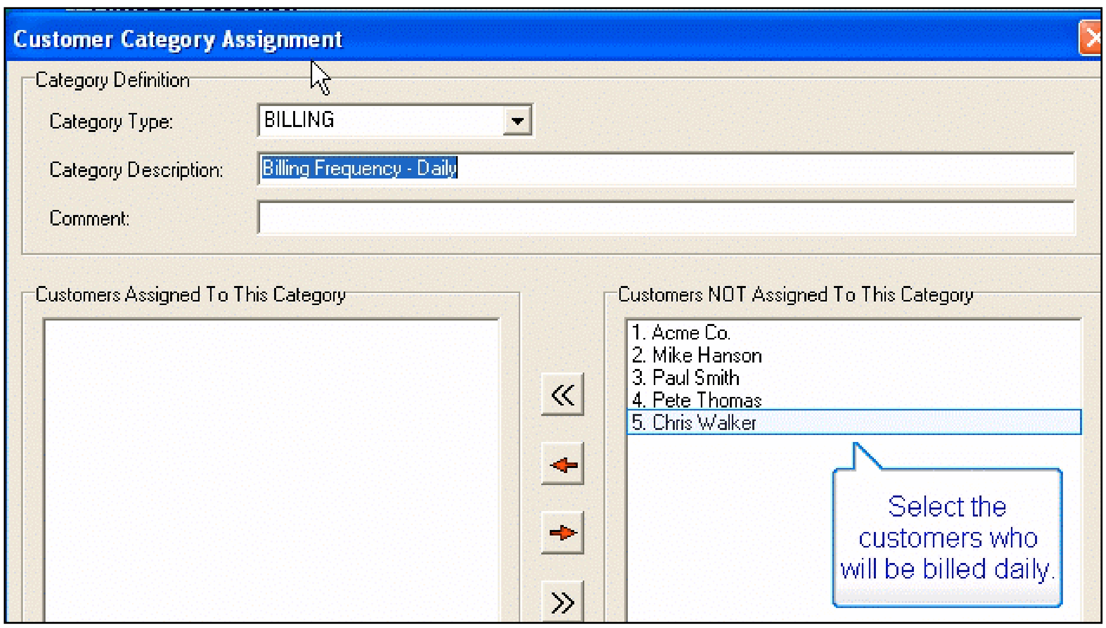


Customer - How to set up customer categories for daily and monthly billing.

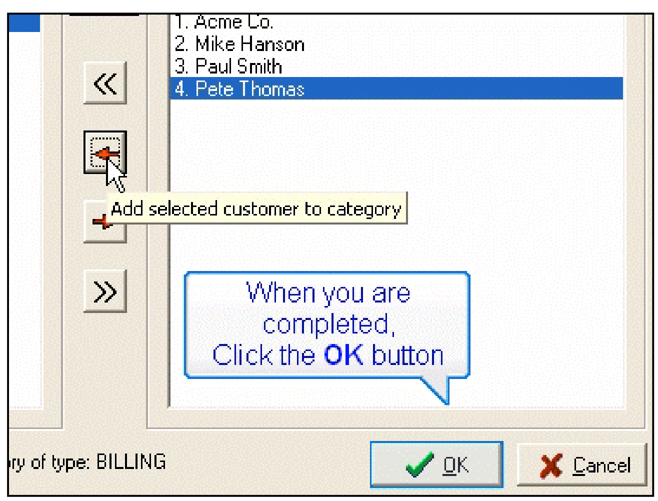
- Step 7. After you have highlighted the Billing Category - Daily, click the EDIT button.



- Step 8. Select the customers who will be billed daily and move them to the left window, using the middle arrow buttons or drag and drop them.

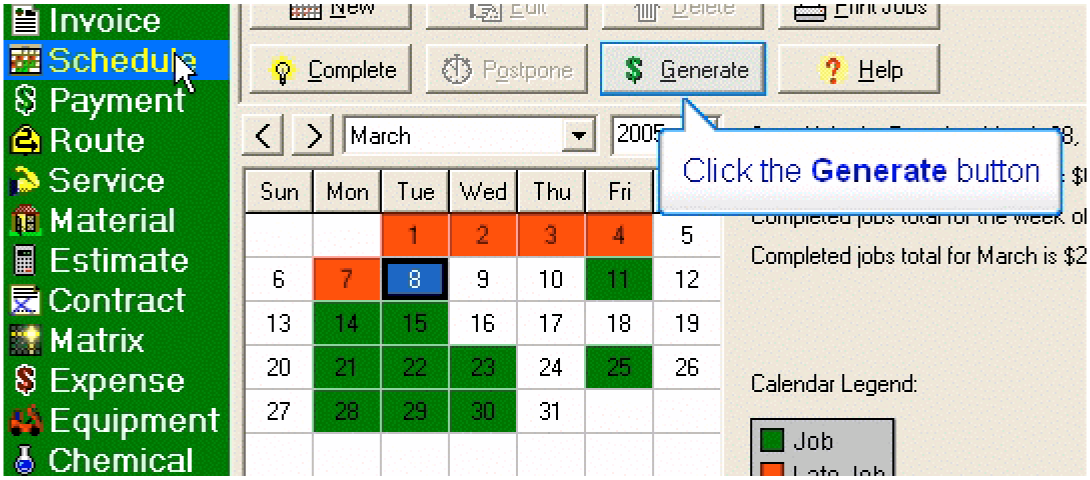


- Step 9. When you are completed hit the OK button at the bottom.

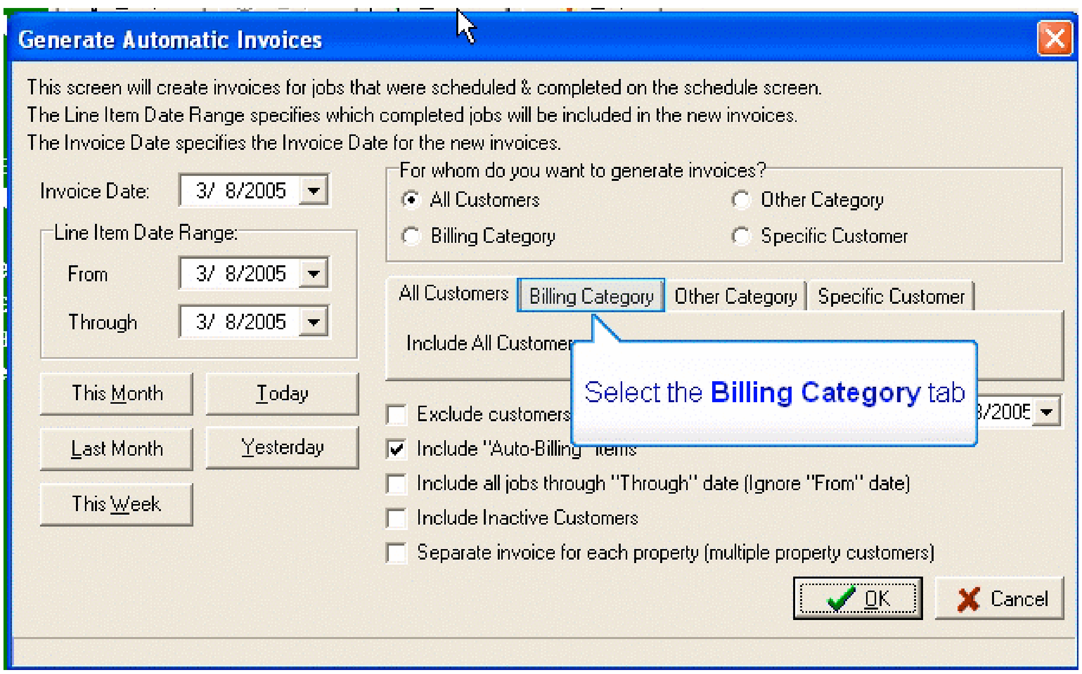


Customer - How to set up customer categories for daily and monthly billing.

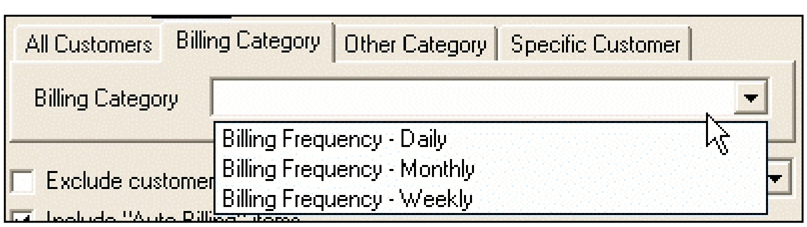
- Step 10. Now go to the Schedule page and click on the GENERATE button.



- Step 11. Choose the appropriate date ranges and then choose the Billing Category tab.

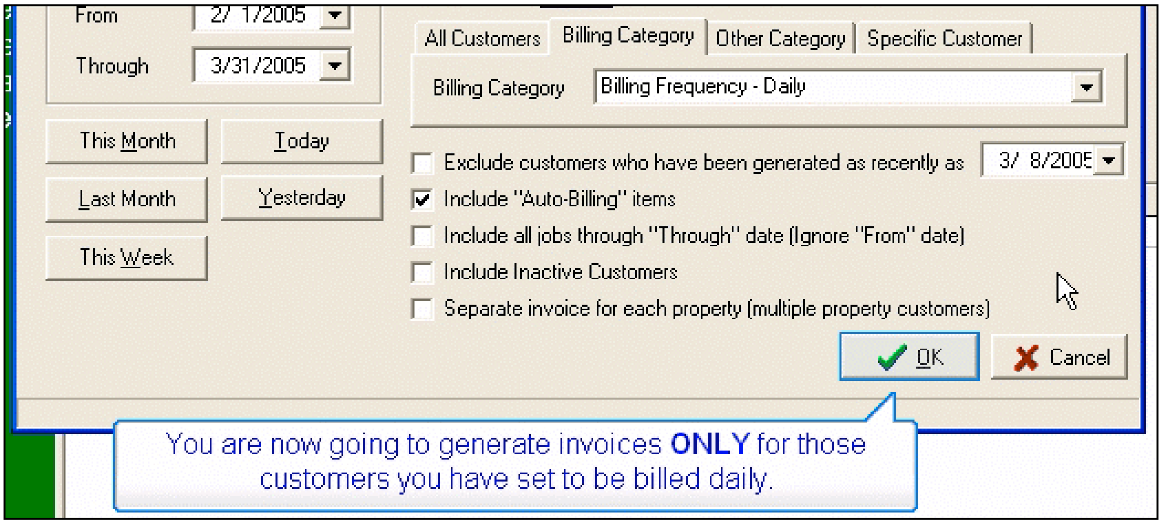


- Step 12. Let's choose to generate invoices only for our daily customers in this example.



Customer - How to set up customer categories for daily and monthly billing.

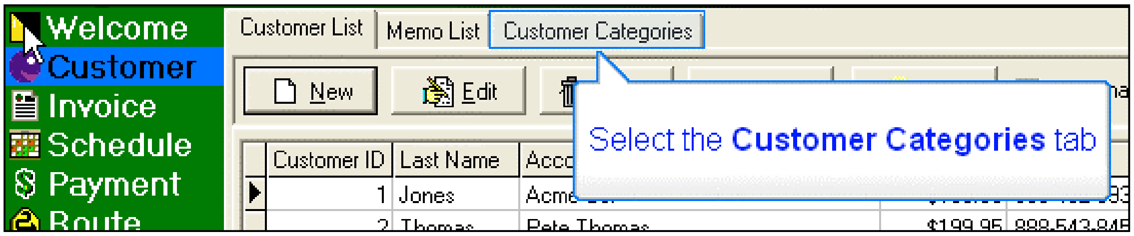
• Step 13. You will now be able to generate invoices only for those customers you have chosen to be billed daily.



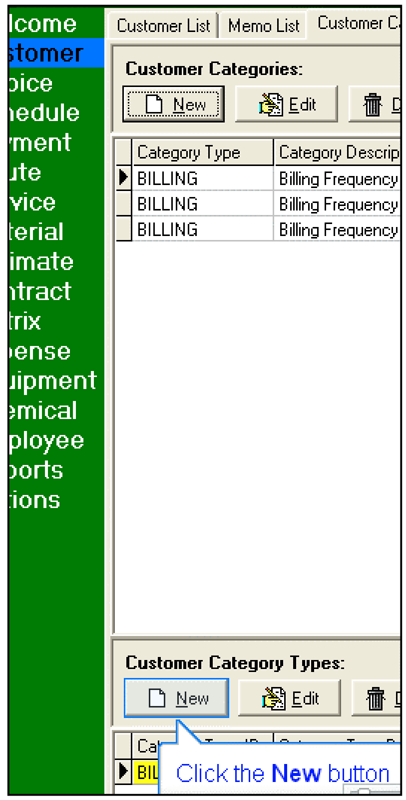
Customer - Using customer categories to generate invoices only for my snowplow customers.

If you would like to set up a customer category for snowplowing and be able to generate invoices only for snowplow customers, follow this example.

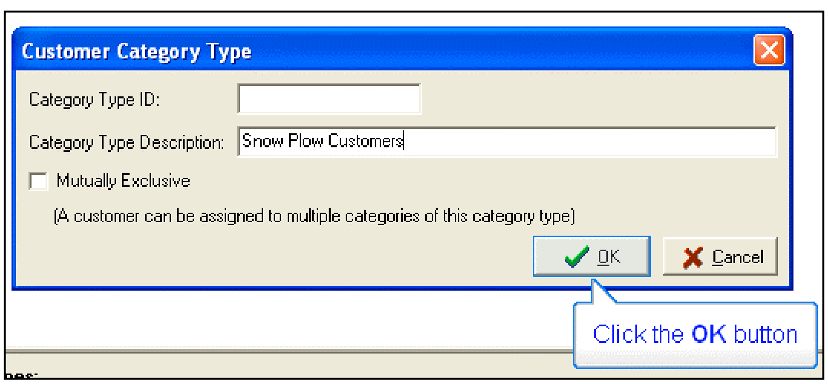
- Make sure you are on the customer section and choose the customer category tab.



- At the bottom of the screen click the new button on the Customer Category Types.

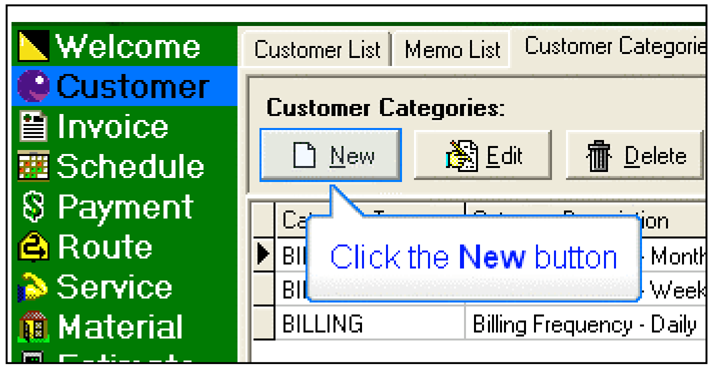


- In the category type description enter Snow Plow Customers or anything else that will help you describe this group. Then click the ok button.



Customer - Using customer categories to generate invoices only for my snowplow customers.

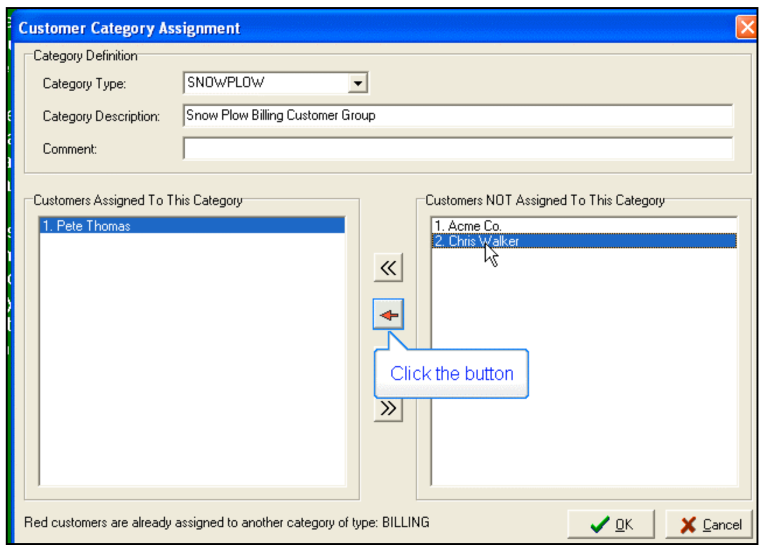
- At the top of the screen click the new button on the Customer Categories.



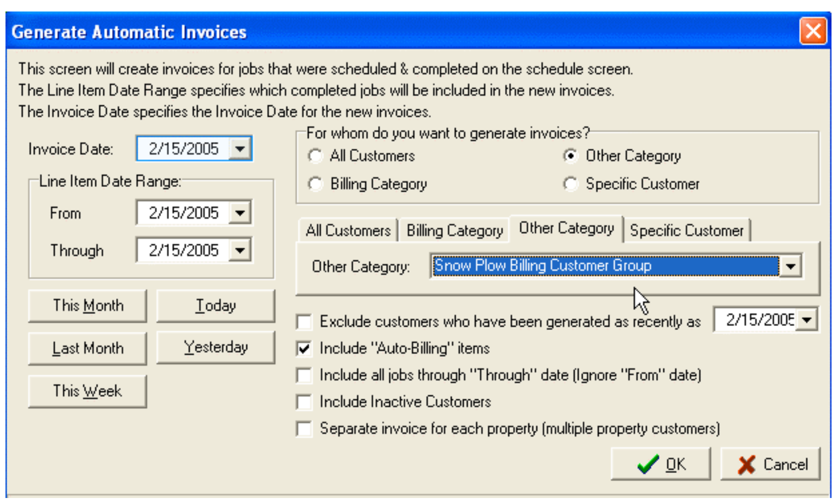
- In the Category Type drop down window choose SNOWPLOW

- In the Category Description type in : Snow Plow Billing Customer Group

- Next bring customers in this group by highlighting them in the right window and dragging and dropping them to the left window or use the arrow buttons in the center. When you have brought all of your snowplow customers into this group click the ok button.



- Then when you are ready to generate your invoices for these customers, go to the invoice page, click on generate and choose Other Category. In the drop down box choose your Snow Plow Billing Customer Group. This will only generate invoices for them.



Customer - Where to place crew comments, for scheduled jobs?

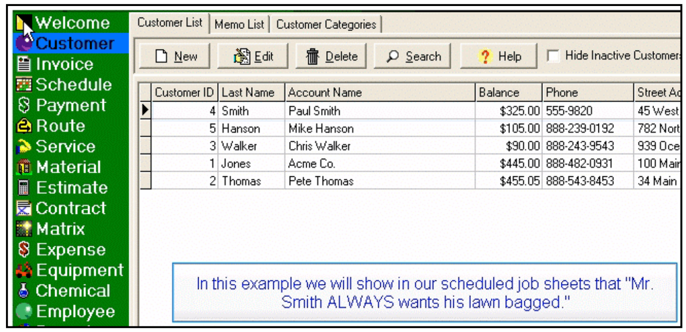
- Where to place crew comments, for scheduled jobs?

- When you schedule your jobs, step 2 "Service" in your job schedule wizard, has a tab at the top 'Crew Comment'. Any comments you type here will appear in your daily job sheets.

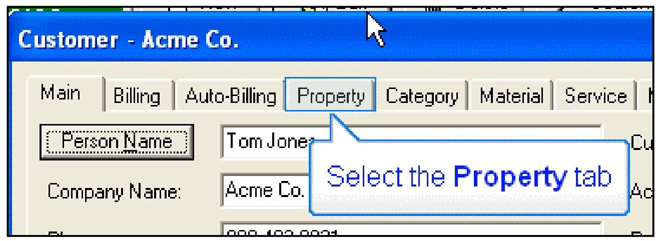
- Otherwise follow these steps:

- You can also add comments per customer property to appear on the scheduled job sheets.

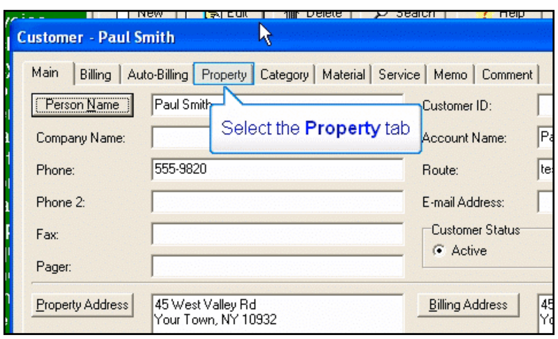
- Step 1. Be on the customer page.



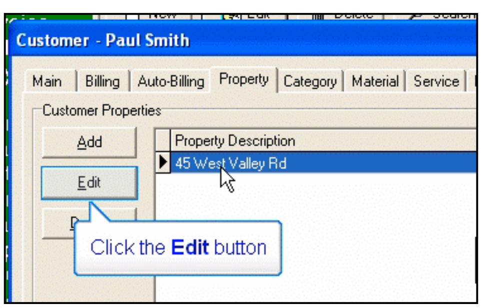
- Step 2. Highlight the specific customer and click the edit button.



- Step 3. Select the property tab.

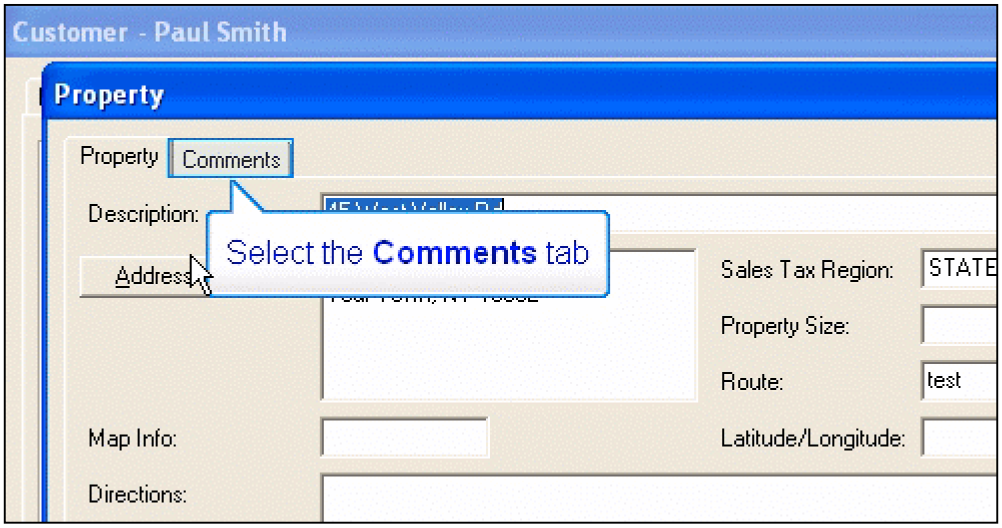


Step 4. Highlight the property and click edit.

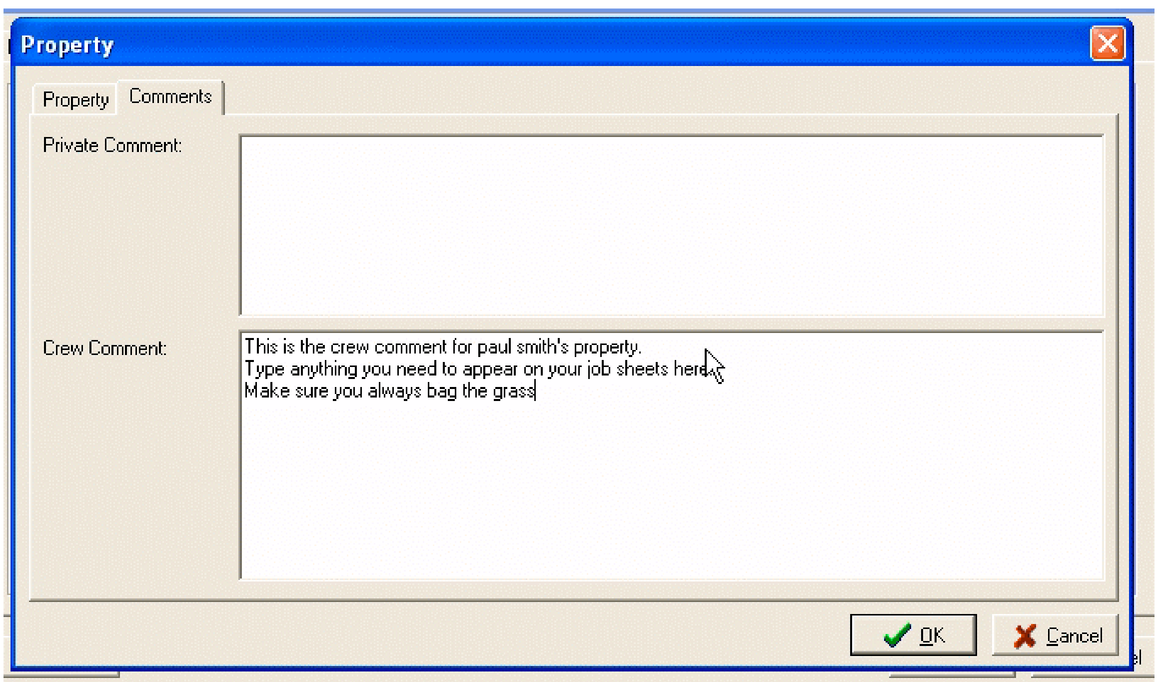


Customer - Where to place crew comments, for scheduled jobs?

- Step 5. Select the comments tab.



- Step 6. Enter a crew comment and click the OK button.



Invoice

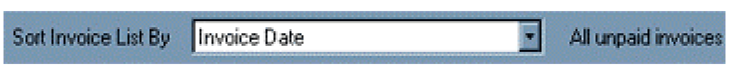
- The basic function of the "Invoice" page is to create and review your invoices.
- At the top of the Invoice window, you will see nine main tabs: "Unpaid", "Current", "0-30 days", "31-60 days", "61-90 days", "91+ days", "Paid", "All Invoices", and "Recently Generated."

- Each tab performs a function that is fairly self-explanitory. The "Unpaid" tab will show all unpaid invoices. The "Current" tab will show all invoices that are not past due. The "0-30 days" tab will show a listing of invoices that are due within the time period of "0-30 days." The "Paid" tab shows a listing of all paid invoices. The "All Invoices" tab shows a listing of all of your invoices. The "Recently Generated" tab shows a listing of invoices that have been generated while the program has been running.

- At the top of each Invoice page you will see database navigation buttons. Use the New, Edit, and Delete buttons to operate your Invoice database. The Print button will print the highlighted invoice you have selected from the list below. The Generate button allows you to create invoices compiled from the list of completed jobs since the last time you have generated your invoices.
- If when you print your invoices, you find that you need to move the addresses to fit in your windowed envelope, click on the Option page on the left hand side green bar, click on the Billing button then choose the Address tab to change the x and y settings. You also have many other invoice options to choose from on Printing tab, such as inserting a logo image. To change the way the invoices are numbered click here.

- To add late fees to your invoices, click on the top program menu "Function" then click "Calculate Late Fees."
- To change the default payment terms on your invoice, go to the Options page then click on the Payment Terms tab.

- At the bottom of the Invoice page window you see the controls to sort your invoice list.



- You can use the drop down box to choose how you want the list sorted. The "Name Filter" field allows you to type in a name to quickly find a customer's invoice. You can also use the "A - Z" tabs to help narrow down your search as well.

Frequently Ask Questions for the invoice section.

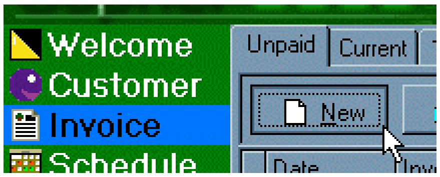
- How do I make a new manual invoice without scheduling my jobs? Page - **42**
- How do I make my invoices automatically from scheduled jobs by generating them? Page - **60**
- How do I generate separate invoices for daily customers and then for monthly customers? Page - **31**
- What type of envelopes do I use for invoices? Page - **43**
- How can I insert my logo into the invoice? Page - **135**
- How do I position my logo, company and customer address on invoice? Page - **136**
- How can I customize my Invoice ID # for each customer. Page - **141**
- What is the ideal logo image file size? We suggest keeping your image around 100k.
- How can I print out (multiple) invoices? Page - **44**
- How to get my phone number in the invoice? Page - **46**
- How do I ungenerate invoices when you accidentally generated them? Or to combine two or more invoices. Page - **47**
- I see many duplicate prices in my invoices. What did I do wrong? Page - **48**

- How do I add late fees to my invoices? Page - **49**
- Do you offer Invoice Template Designs? Page - **50**
- How to toggle the invoice stub (on/off). Page - **134**
- How can I bill my customers in advance? Page - **72**
- How do I change the height of the invoice payment stub? Page - **51**
- What is the Invoice Stub Text for? Page - **137**
- Turn display account balance on invoice (on/off). Page - **134**
- Why does the year gets cut off when printing an invoice? Go to the Start Button, Control Panel, Switch to Classic View, Regional Options, Customize, Date Tab, Change short date format to m/d/yy.
- How to create separate invoices for multiple property customers? Page - **59**
- How to quickly enter payments for invoices with Quick Pay. Page - **52**
- How to set up re-occuring billing? You can use auto billing (p. **24**) or the contract feature. Page - **87**
- When do you use the paid checkbox and when do you use the special check box? Page - **53**
- How do I print out information of chemical applications on the invoice? Page - **54**
- How do I toggle printing the chemical information on the invoice? Page - **134**

Invoice - How do I make a new manual invoice without scheduling my jobs?

Make sure you are in the invoice section of Gopher.

- Click the "New" button



- A "Select Customer for New Invoice" window will appear.
- You have three ways to choose the customer.
- Choose the Customer by their "Customer ID."
- Choose the Customer by their "Last Name."
- Or choose the Customer by their "Customer Name."
- Click the "OK" button.

- An "Invoice" window will now appear.
- Click "Add Item"
- Click the "Service" button.
- Type in a "Service Description."
- Type in a "Sub-Total."
- Click the "OK" button.
- Click the "OK" button again.

Invoice - What type of envelopes do I use for invoices?

Gopher is designed to print invoices and statements that are folded three ways and inserted into a clear windowed envelope. Since envelope design may vary a little based on the manufacturer, take along a printed invoice when you visit your local office supply store to see which envelope works best for you.

- Gopher invoices work ideally with a 3 7/8 inch x 8 7/8 inch invoice size double window envelope.
- Such as the Staples brand with SKU # 266759.
- Office Depot the model # is CO165

Invoice - How can I print out (multiple) invoices?

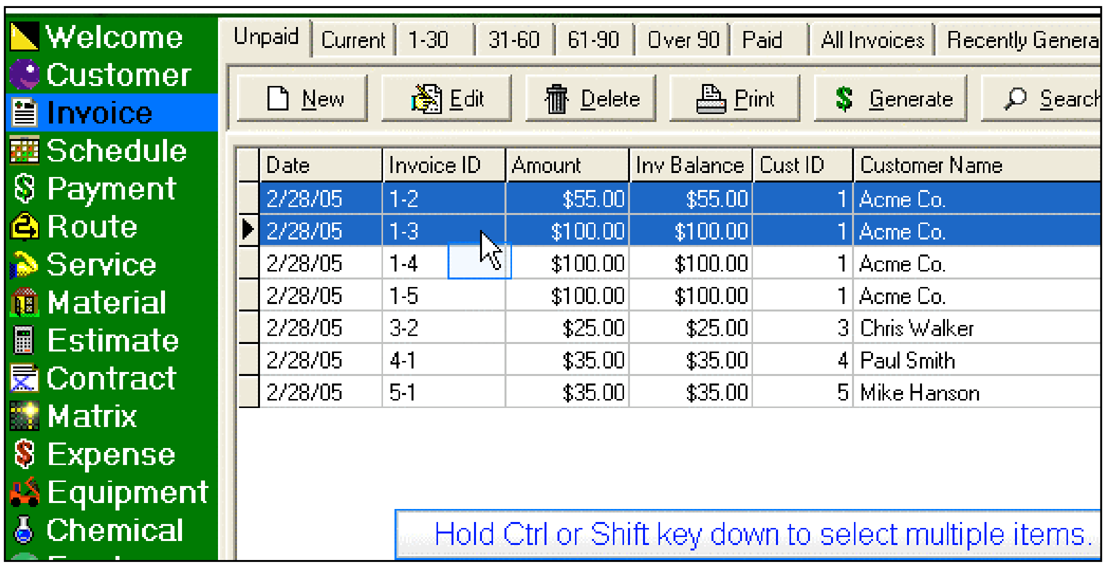
- There are a few ways to print invoices. When you generate your invoices, you are given the option to print them afterwards.

- Or you can print them from the invoice page.

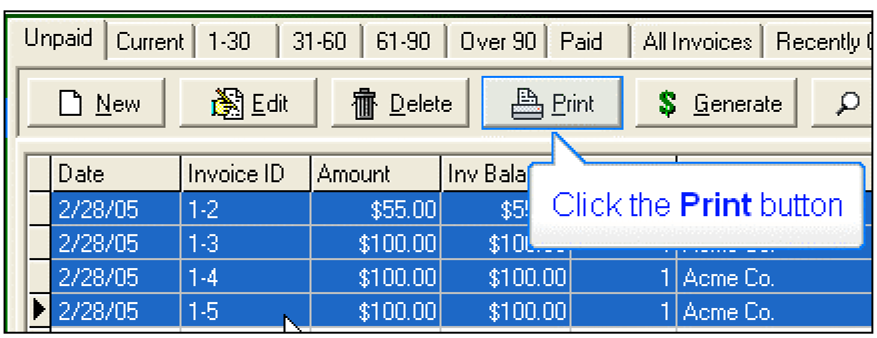
- Or you can print them from the reports page.

- As an example, let's print them from the invoice page.

- Make sure you are on the invoice page. You can highlight multiple invoices at once by either holding down the ctrl key and clicking on them or hold the shift key down and click on the first and last invoice you want to highlight.

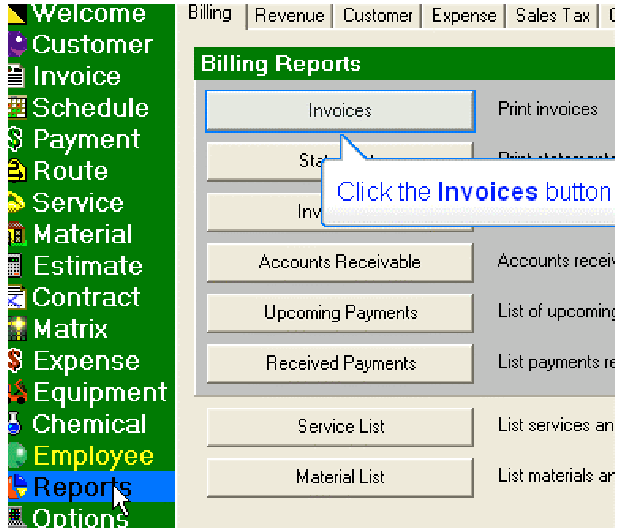


- Next click the print button. This will print all of your highlighted invoices.

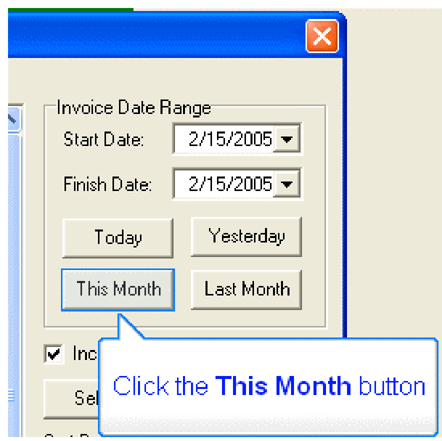


Invoice - How can I print out (multiple) invoices?

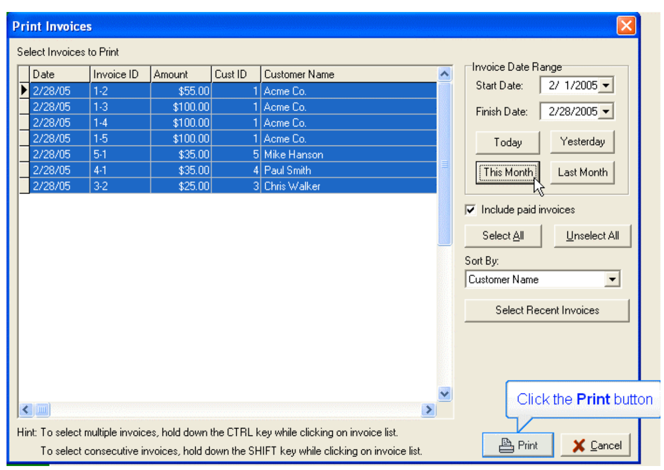
- Or you can go to your Report section and click on the Invoices button in the billing tab.



- Choose the invoice date range or click on the preset buttons such as this month.



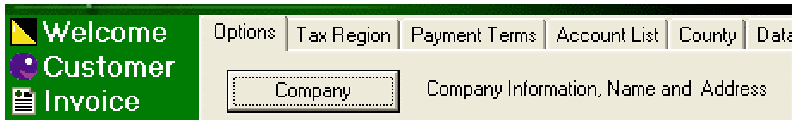
- The invoices highlighted in blue are the ones which will be printed when you click on the print button. You can unhighlight certain invoices by holding down the ctrl key and clicking on the invoices you don't want printed.



Invoice - How to get my phone number in the invoice?

- Here are some suggestions on how to get your phone number on your invoice.
- Go to the Options section on the left side of Gopher.

- Click on the Company button.



- After your address you can put your telephone number and e-mail.

- You can also do this under stub text or invoice message, you might want to try different things and see the results.
- Another way is to use MS Paint (or another like program) to make a bitmap file with your Logo (optional), Name, address, phone, email if desired, etc. You can choose your favorite fonts for each lline. Then go to options. Check "Use company logo...". Uncheck "Display company name...". Use "Select Company Logo..." to locate the file you made. It will take some trial and error to get what you want from MS Paint, however. (Use "save as" in MSPaint and select 24bit bitmap as the file type.)

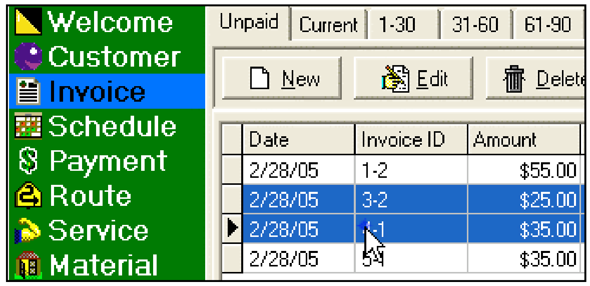
Invoice - How do I ungenerate invoices when you accidentally generated them?

A Common Problem.

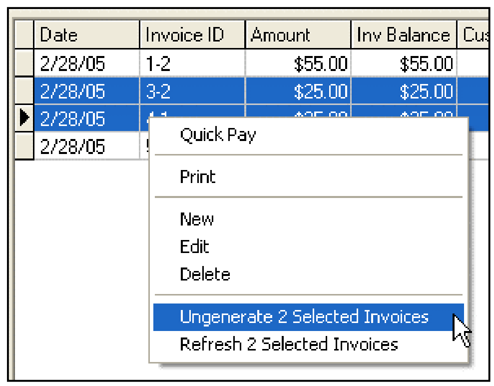
- If you are new to using Gopher, a common situation that happens is you set up some customers, do some scheduled work, mark the jobs complete and then generate. You do this again the next week and throughout the month. At the end of the month you have multiple invoices for one customer when you only wanted one invoice per customer.

Solution.

- For example say you have multiple invoices for your customers and you only want one invoice per customer, go to the invoice page. Make sure you are on the Invoice section of Gopher and choose the appropriate tab at top, possibly ALL INVOICES. Then you can highlight the invoice you want to ungenerate by left clicking on it.



- Then right click your mouse and left click on Ungenerate Invoice.



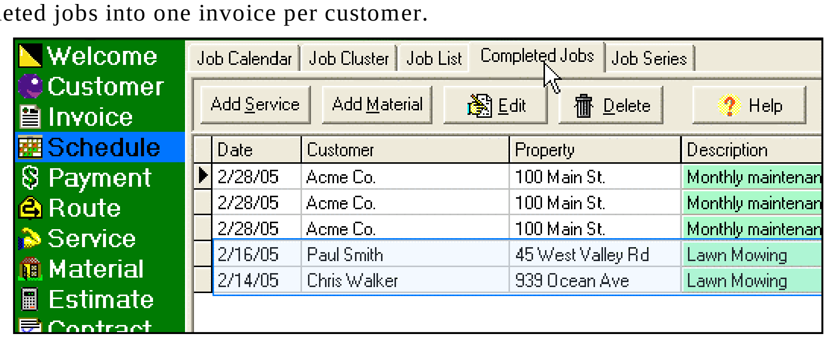
- **What if you have many invoices you want to ungenerate?**

- You can highlight multiple invoice by doing one of two things. If you want to highlight all your invoices, the easiest way is to left click on the first invoice, then hold the SHIFT key down, scroll down to your last invoice and left click on it. If you did this properly you will see all the invoices highlighted and you will then be able to right click on them and choose ungenerate invoices and it will ungenerate all the invoices you highlighted.

- If you want to ungenerate many invoices but be able to pick and choose which ones you can also hold down the CTRL key and left click on all the invoices you want to ungenerate. If you hightlight one in error, simply click on it again and it will unhighlight it.

- Once you have ungenerated the invoices you chose, you can now click on the generate button and recompile all those completed jobs into one invoice per customer.

- The invoice line items that have been ungenerated go back to the Schedule page, Completed Jobs tab. They are highlighted here for this example in blue.



Invoice - I see many duplicate prices in my invoices. What did I do wrong?

Problem: After generating my invoices for the first time I see many duplicate prices in my invoices. What did I do wrong?

- The most common mistake we find happens when first starting off is that a Gopher user will set up a customer with a monthly contract fee and then will also charge the customer per scheduled cut. That will cause the customer to be billed twice. They are being charged per cut and then a flat rate at the end of the month.

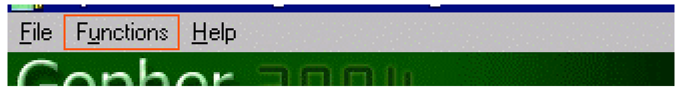
Solution

- In order to solve this, if you use the contract feature and charge the customer a flat rate each month, set the scheduled job fee to $0.00. Try this and see if it helps.

- Also something to consider is are you generating at the end of the month? Or at different times throughout the month? Ultimately if you want to send your bills out at the end of the month, only generate at the end of the month. You can ungenerate invoices and then regenerate them if you need to. Go to the invoice page and then right click on the invoice you want to ungenerate then left click on the menu that appears. Then you can generate your invoices again which will combine all your line items into one invoice.

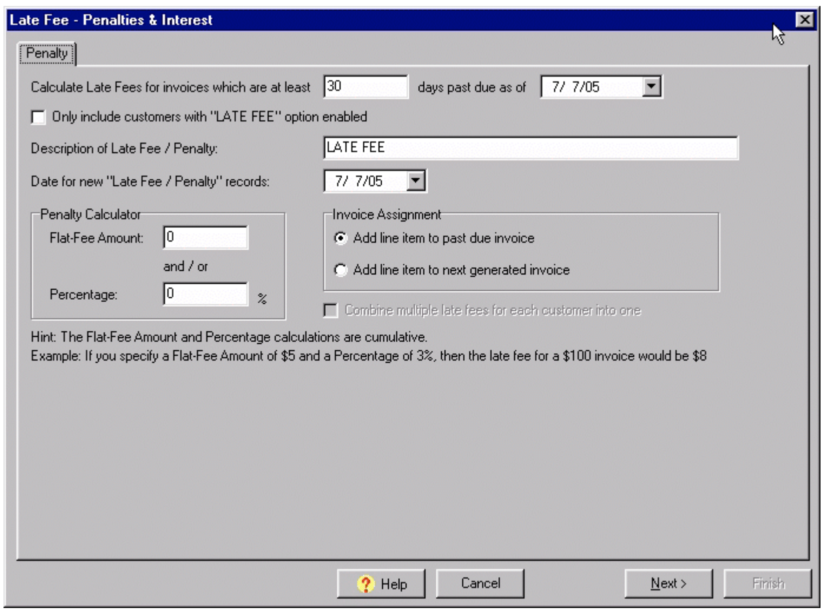
Invoice - How do I add late fees to my invoices?

- To add late fees to your invoices,



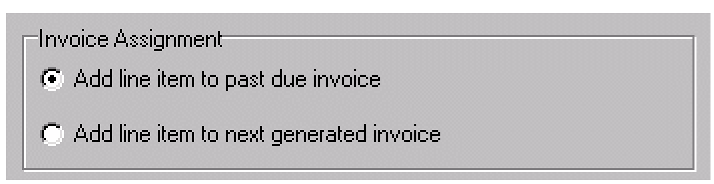
- Click on the top program menu "Function"
- Click "Calculate Late Fees."

- You have a few options when you calculate your late fees.



- Choose which invoices will have late fees applied to them.
- The "only include customer with Late Fee option enabled" check box allows you to determine which customers will get late fees. You can set the late fee option for each specific customer in the customer page section when you edit a customer's information.
- Description of Late Fee Penalty is the way the line item will appear in the invoice to explain the charge.

- Penalty Calculator allows you to choose if a flat-fee amout and/or a percentage will be applied to the invoice.



- Invoice Assignment allows you to choose if you will have the late fee apply to current invoices or as a completed job that will await the next time you generate your invoices.
- Choose - Add line item to past due invoice
- If you want to add a late fee line item to an already generated invoice. (This is not often used.)
- Choose - Add line item to next generated invoice

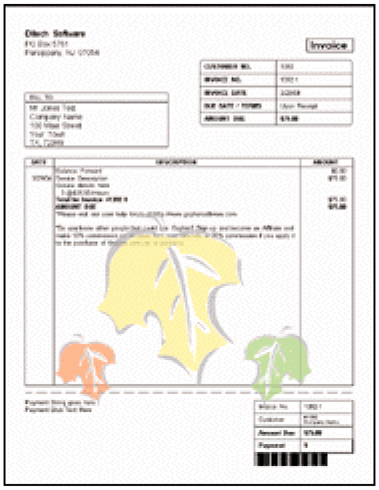
- If you want the late fee line item to be put into the Schedule - Completed Jobs tab to wait until your next generated invoices. (Most common way to use this feature.)

Invoice - Do you offer Invoice Template Designs?

If you would like to add more color to your invoices, visit our website to download our free invoice templates.

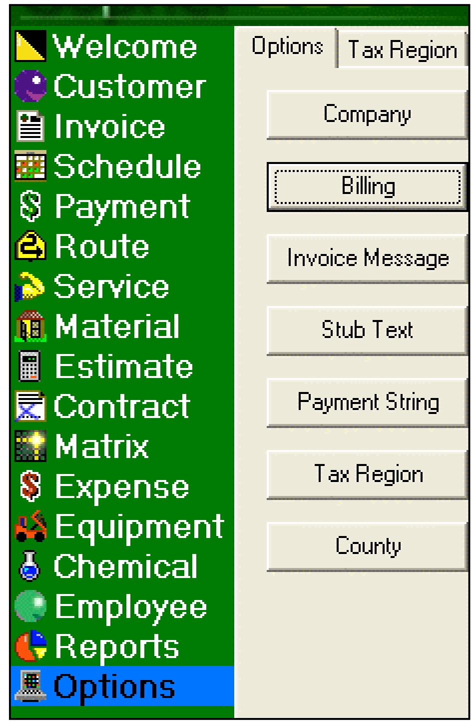
http://www.gophersoftware.com

- Here is a sample fall invoice template.

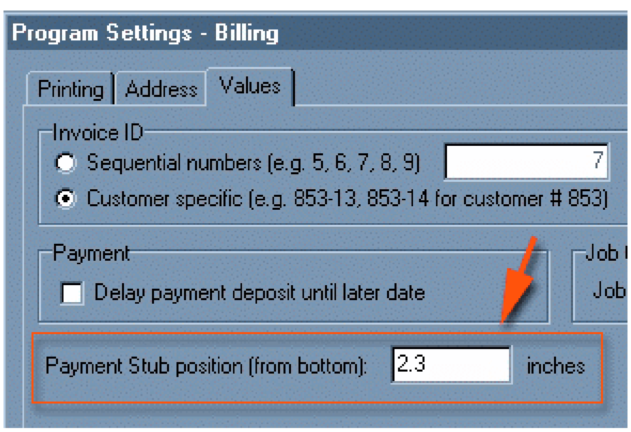


Invoice - How do I change the height of the invoice payment stub?

- You can change the payment stub position at the bottom of your invoice by clicking OPTIONS | BILLING Button | VALUES



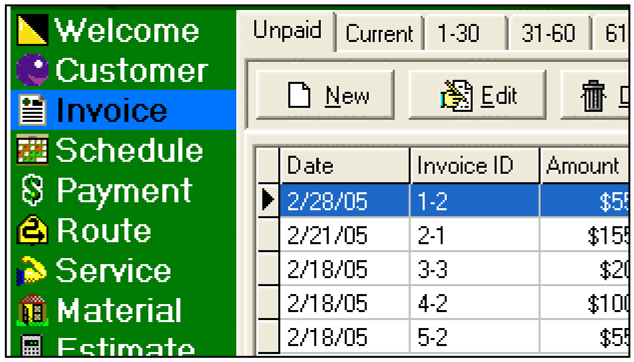
- Alter the position from bottom until you achieve your desired results.



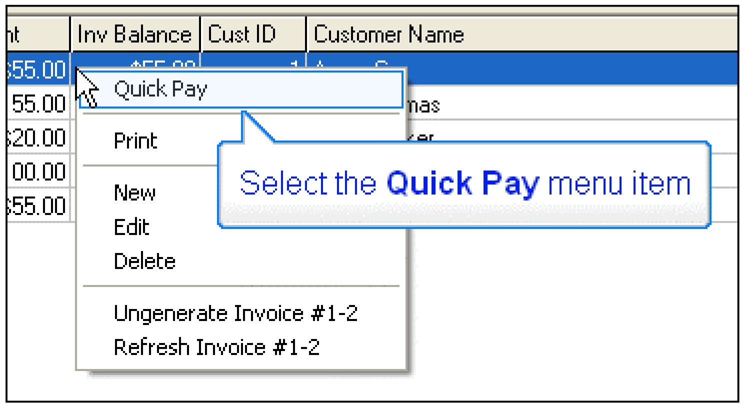
Invoice - How to quickly enter payments for invoices with Quick Pay.

To quickly enter payments for a specific invoice, make sure you are on the invoice section.

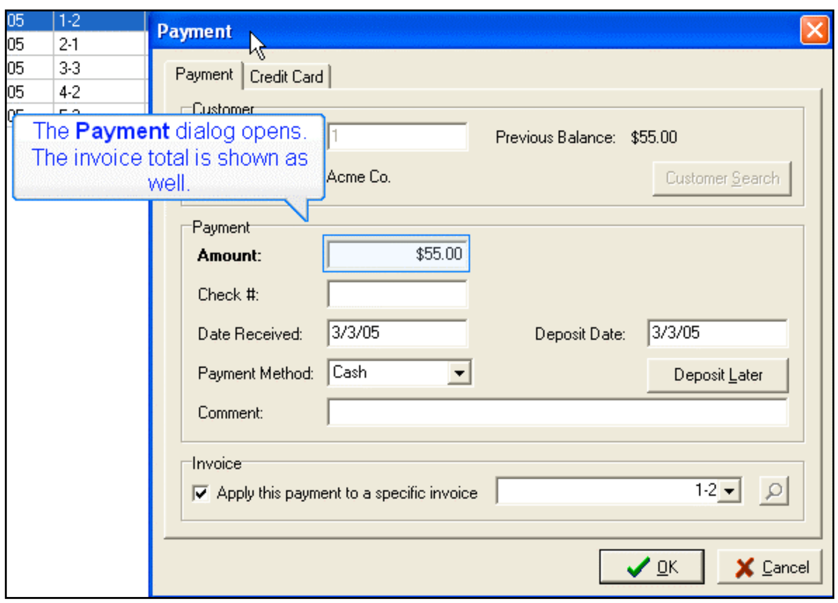
- Left click on the specific invoice.



- Then Right click on the invoice and a sub menu will appear. LEFT click on the Quick Pay option.



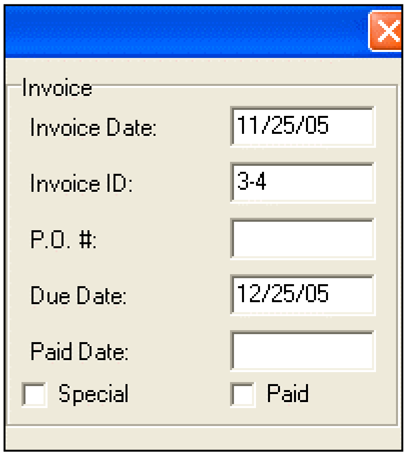
- A payment window will appear with the invoice total entered in the payment amount. You can edit this or click ok to mark this invoice paid.



Invoice - When do you use the paid checkbox and when do you use the special check box?

- The "payment checkbox" on the invoice page, marks the discount field equal to that of the invoice balance.

- **Example:** When might you used that? Say a customer pays you $99 when the invoice balance is $100. You may just want to waive the invoice then as being paid.

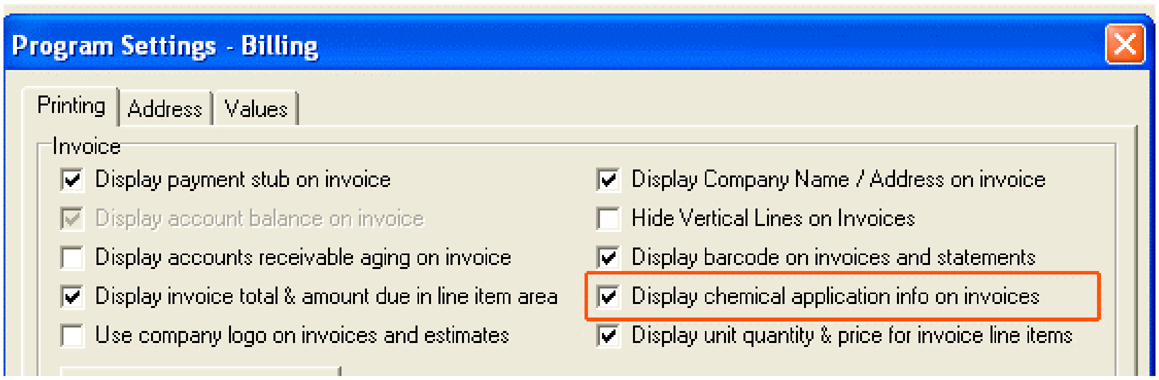


- The "special checkbox" allows you to exclude that invoice from certain reports.

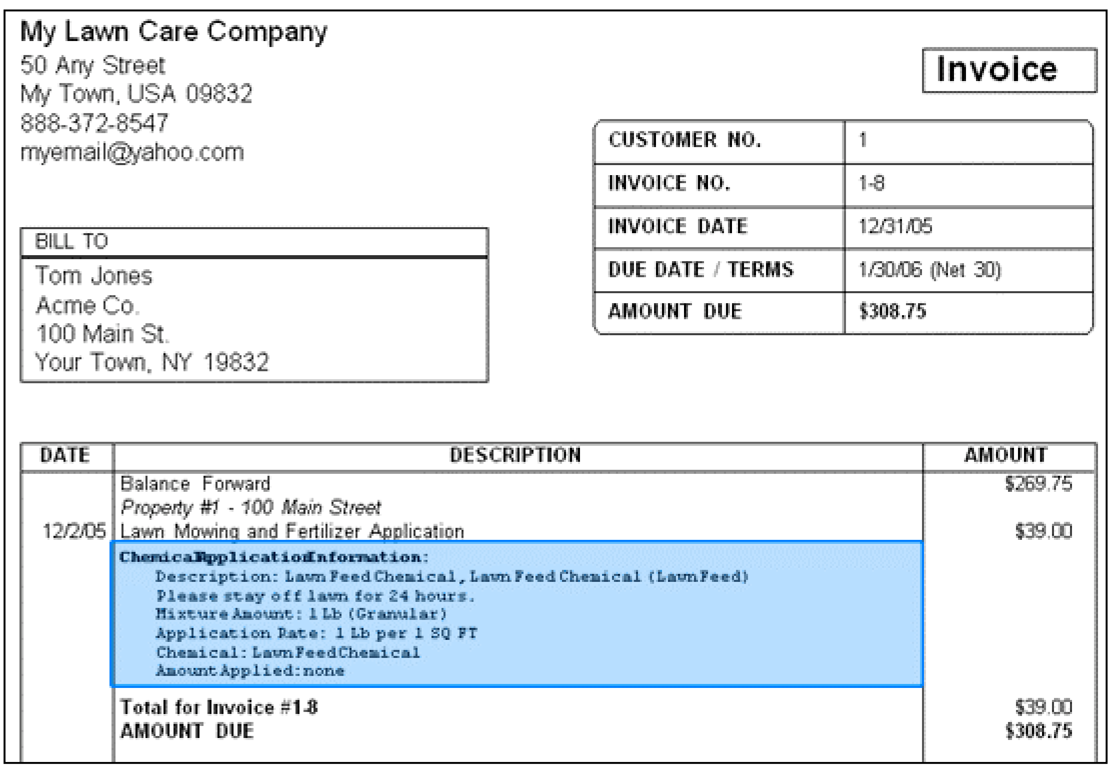
Invoice - How do I print out information of chemical applications on the invoice?

- To have your invoice print out information on the chemicals applied, make sure you have scheduled your job to include chemical applications.

- Check the option to print chemical information on the invoice. In the Options section, Billing button.



- Then when you print your invoice it should include the chemical information as highlighted in blue below.



Schedule

The basic function of the "Schedule" page is to create and review your scheduled jobs. At the top of the Schedule window, you will see five main tabs: "Job Calendar", "Job Cluster", "Job List", "Completed Jobs", and "Job Series." The "Job Calendar" tab allows you to enter information on each of your scheduled jobs. You will see database navigation buttons at top. Use the New, Edit, and Delete buttons to operate your Schedule database.

At the center of the Schedule page window you see a calendar that allows you to view the days you have jobs scheduled. A day that is colored green signifies an upcoming day of at least one scheduled job in it. A day that is colored red signifies a day has passed which includes at least one job that wasn't marked as completed. You can right click on the calendar for additional scheduling options.
The bottom of this window will list upcoming jobs. Use the "Show Jobs for the highlighted" control to choose to display jobs for the highlighted day, week, or month. Highlight different days of the calendar with your mouse to view different job lists below the calendar.

If you don't want to schedule in each individual job and would instead like to quickly schedule a grouping of Monday, Tuesday, Wednesday, etc. jobs all at one time, check out how to use the Job Clusters in the next Schedule section.

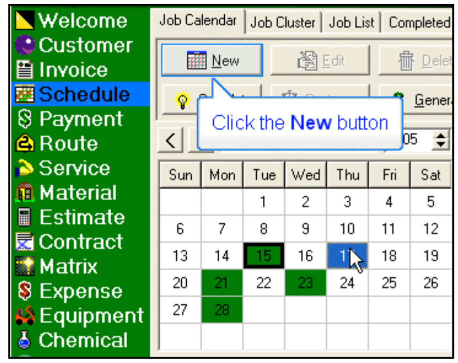
Remember that the Gopher Barcode wand works with your schedule jobs sheets. To quickly mark jobs complete at the end of the day simply scan across the unique bar code.

Frequently Ask Questions for the schedule section.

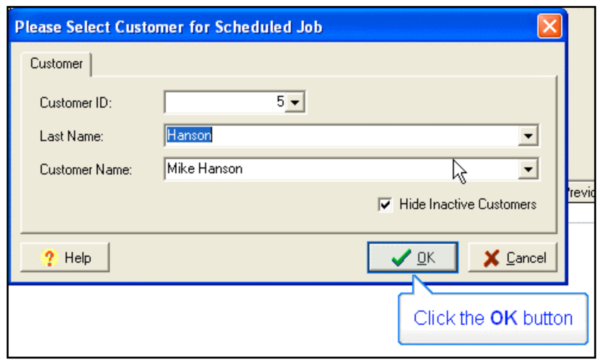
- How to enter a new scheduled job. Page - **56**
- How to schedule a one time job. Page - **61**
- Creating a 4 or 5 Step, Lawn Application Program with the Gopher Job Series option. Page - **63**
- How do I use Job Clusters? Page - **66**
- How to delete a job from the schedule? Page - **67**
- Where do I add extra unscheduled jobs I have performed so I won't forget to bill the customer? Page - **68**
- Can I schedule a material and service in the same process? Page - **56**
- How can I postpone scheduled job? Page - **69**
- Where to place crew comments, for scheduled jobs? Page - **38**
- How do i turn off the bar code in the schedule? Page - **15**
- How to view a customer's upcoming job dates. Page - **70**
- How to order the customers in the schedule print out? Page - **78**
- How to print your jobs. Page - **15**
- Complete jobs for the wrong job date. What do I do now? Page - **71**
- How to bill in advance. Page - **72**
- How to set job start and finish times, in scheduled jobs? Page - **19**
- What does the Job List Tab do? Page - **70**
- How to print only select pages of your daily schedule. Page - **16**
- I maintain a home owner's association house that I bill $100.00 per month on contract, but I also want to schedule each cut. How do I do this? Page - **72**

Schedule - How to enter a new scheduled job.

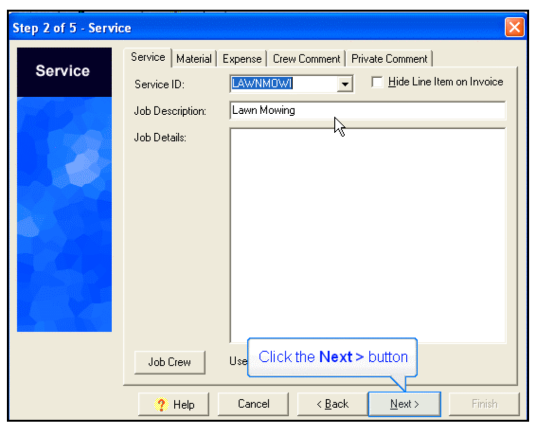
- Make sure you are on the tab "Job Calendar."
- Click the "New" button. Or use your mouse and right click on the calendar day and choose to "schedule job."



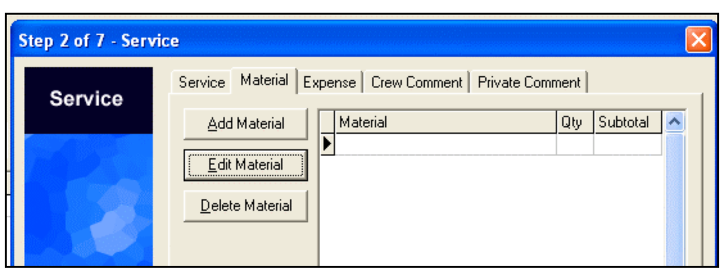
- A "Please Select Customer for Scheduled Job" window will appear.
- Use the drop down box in one of the three options to select a customer.
- Click the "OK" button.



- A "Step 2 of 8 - Service" window will appear.
- "Job Description" - Choose a service from the drop down box. The services that appear here are those you have previously entered in the "Service" page. You can also type in a service name such as Lawn Mowing.

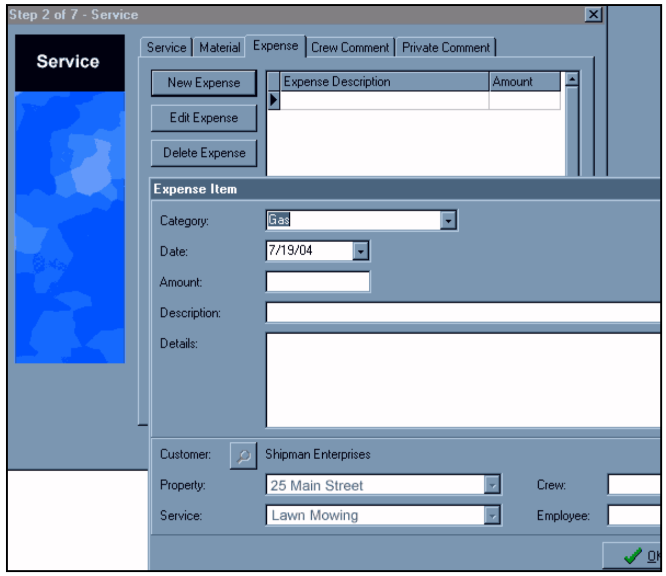


- **(Optional)** You can also schedule any materials needed for this job by clicking on the material tab.



Schedule - How to enter a new scheduled job.

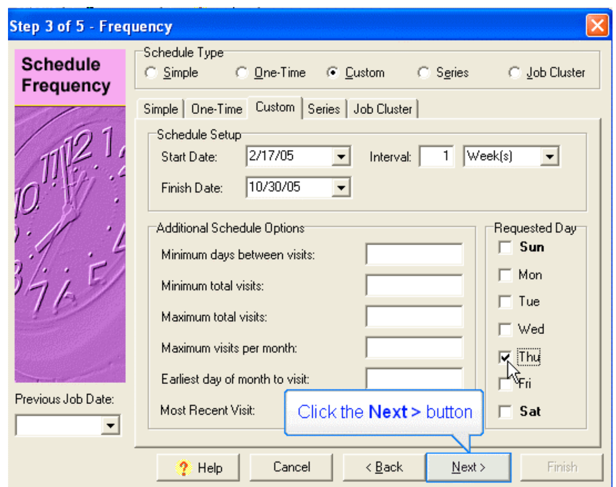
- **(Optional)** Schedule in your expenses associated with this job.



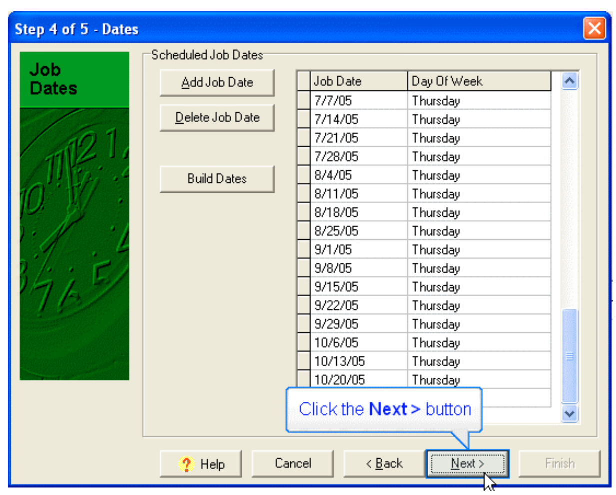
- Click the "Next" button at the bottom of the window.

- Continue to click the "Next" button past the following windows "Equipment", "Chemical Application" until you get to the window "Frequency."
- Choose the Custom tab.
- "Interval" - If you service this lawn once a week then leave the Interval at "1 - Week(s)". If you service the lawn every two weeks then set the Interval to "2 - Week(s)". If you service the lawn once a month then set the Interval to "1 - Month(s)". If you service the lawn every ten days then set the Interval to "10 - Day(s)".

- We also set the Requested Day to Thursday.

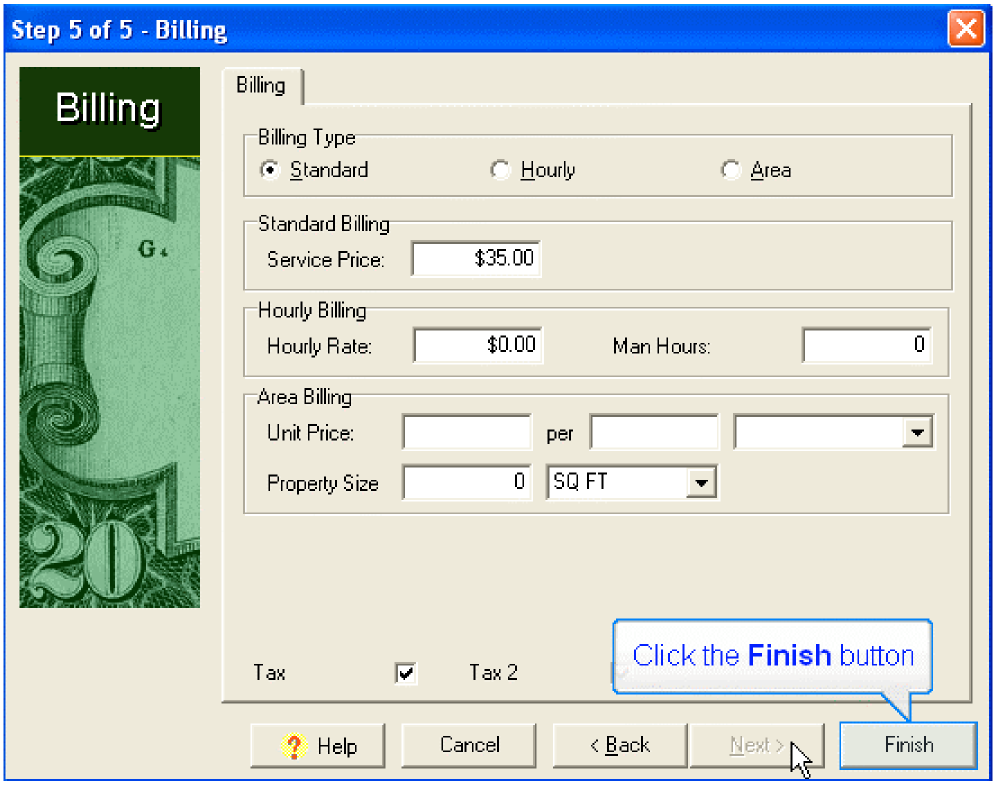


- Click the "Next" button at the bottom of the window.
- Review the Job Dates. Add or remove any dates desired and click the Next button.



Schedule - How to enter a new scheduled job.

- You should be on the "Billing" window now.
- "Service Price" - Enter the fee for this service.

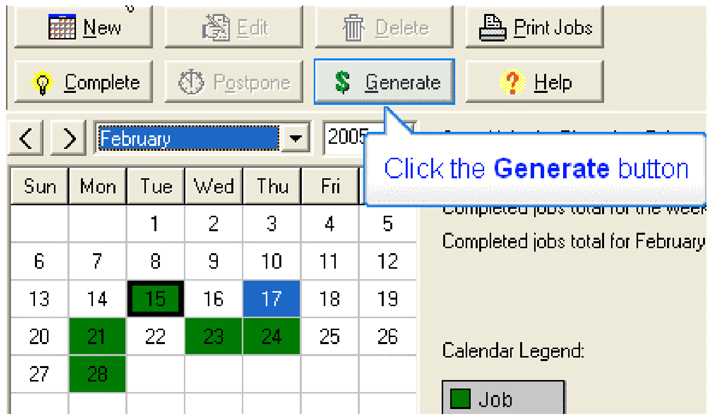


- Click the "Finished" button at the bottom of the window.

- You should now be back at the main "Schedule" page. Look at the calendar and you should see a day that is green. Click on that day and you will see the job appear in the job list below the calendar.

Schedule - How do I make my invoices automatically from scheduled jobs by generating them?

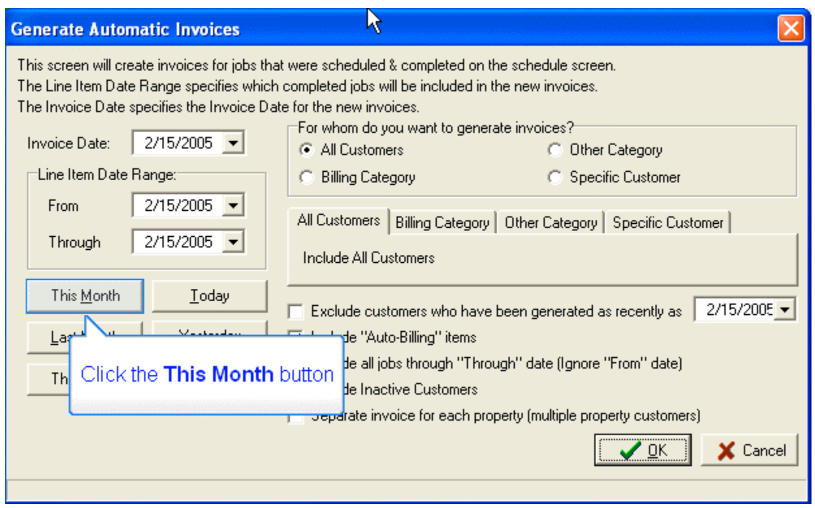
- The generate button will combine all completed jobs, contracts, and auto-billing items that have been created since the last time you have generated your invoices. You can review your list of completed jobs by clicking on the "Schedule" section of Gopher and then clicking on the "Completed Jobs Tab."
- When you generate your invoices, you have the option of generating for all of your customers, chosen billing category customers, other category customers, or a specific customer.



- First step is to be on the schedule page and click on the Generate button.

Remember: If you send out your invoices once a month at the end of the month, only generate your invoices once at the end of the month.

In this example we are going to generate our invoices for the month.

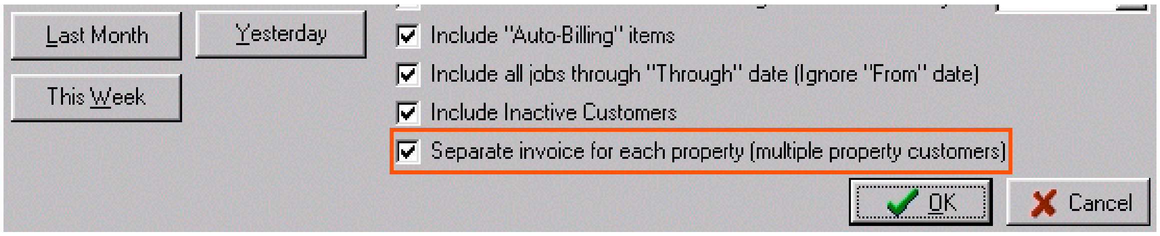


- Invoice Date is the date that will appear on the top of your invoice. You can set this to whatever you want. Line item date range determines which completed jobs will be included in this invoice.

Schedule - How do I make my invoices automatically from scheduled jobs by generating them?

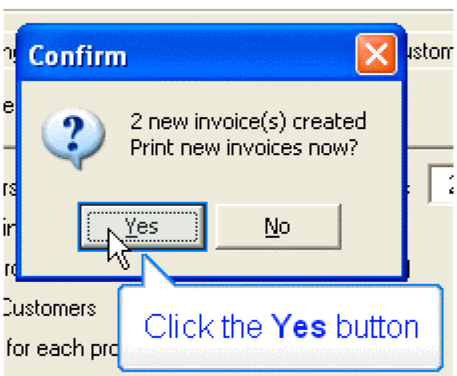
Separate Invoices for each property.

- If a customer has multiple properties and wants a separate invoice for each property, check the "Separate invoices" checkbox



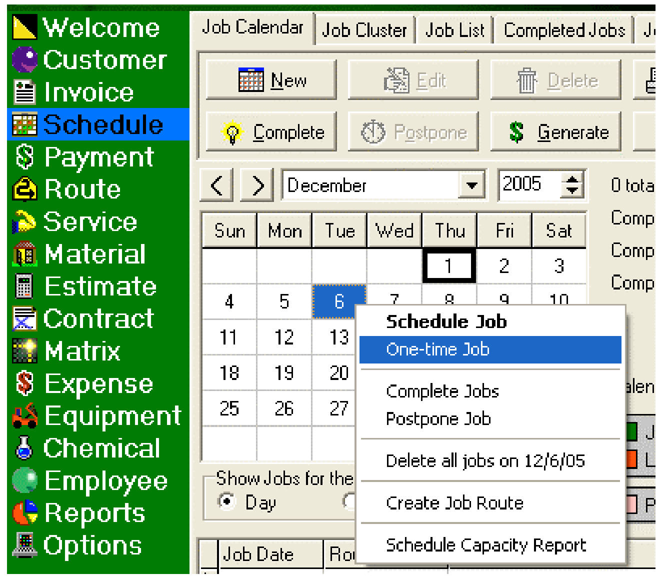
- Click ok when ready.

- If you had completed jobs for the correctly set a line item date range and customers chosen, you will see this confirmation window, otherwise recheck your settings.

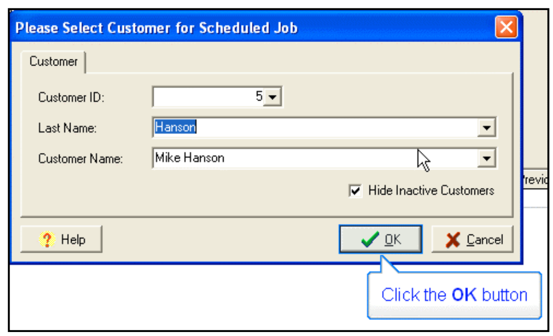


Schedule - How to schedule a one time job.

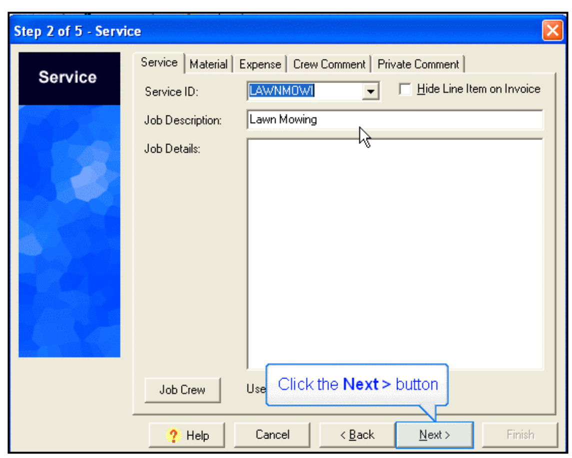
- If you have a customer who calls and wants you to schedule them for a one time job, follow this example.
- Make sure you are on the schedule section of Gopher and RIGHT click on the day in the calendar.
- A sub menu will appear
- LEFT click on one-time job.



- A "Please Select Customer for Scheduled Job" window will appear.
- Use the drop down box in one of the three options to select a customer.
- Click the "OK" button.



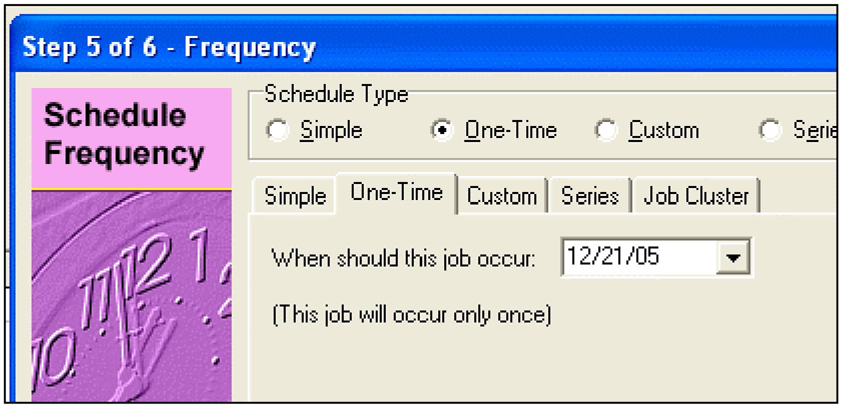
- A "Step 2 of 8 - Service" window will appear.
- "Job Description" - Choose a service from the drop down box. The services that appear here are those you have previously entered in the "Service" page. You can also type in a service name such as Lawn Mowing.
- Click the "Next" button at the bottom of the window.



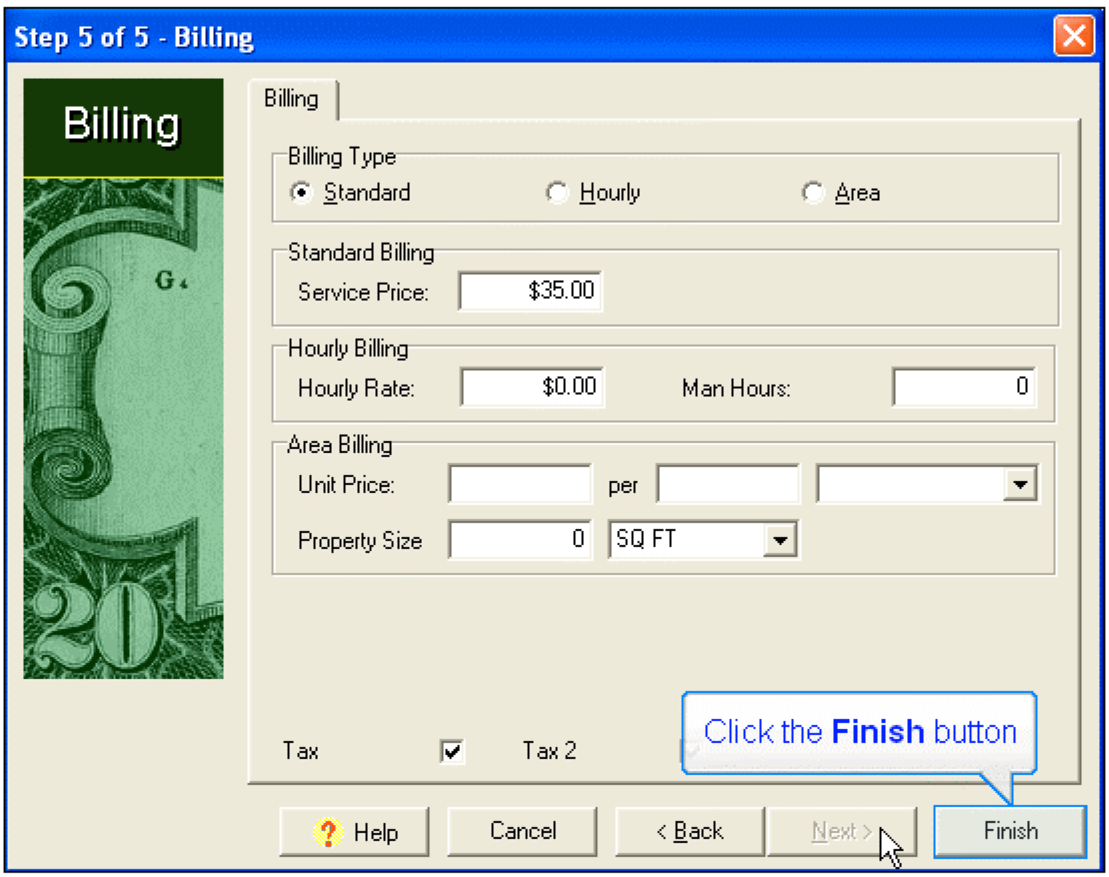
- Continue to click the "Next" button past the following windows "Equipment", "Chemical Application" until you get to the window "Frequency."

Schedule - How to schedule a one time job.

- On the Frequency window, you should be on the one-time tab and the appropriate date should already be entered.
- Click next.



- You should be on the "Billing" window now.
- "Service Price" - Enter the fee for this service.



- Click the "Finished" button at the bottom of the window.

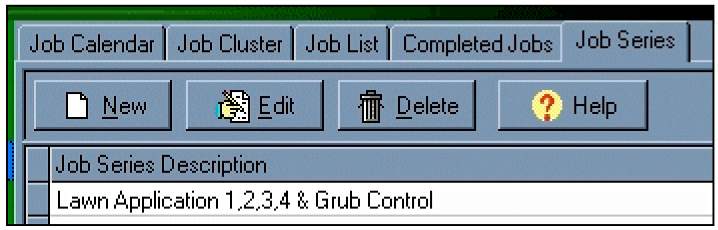
- You should now be back at the main "Schedule" page. Look at the calendar and you should see a day that is green. Click on that day and you will see the job appear in the job list below the calendar.

Schedule - Creating a 4 or 5 Step, Lawn Application Program.

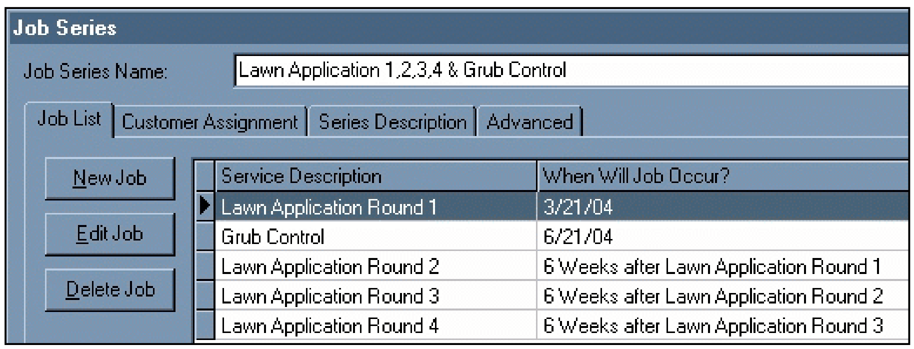
Here is an example of entering a 4 or 5 step lawn care application.

Step 1:

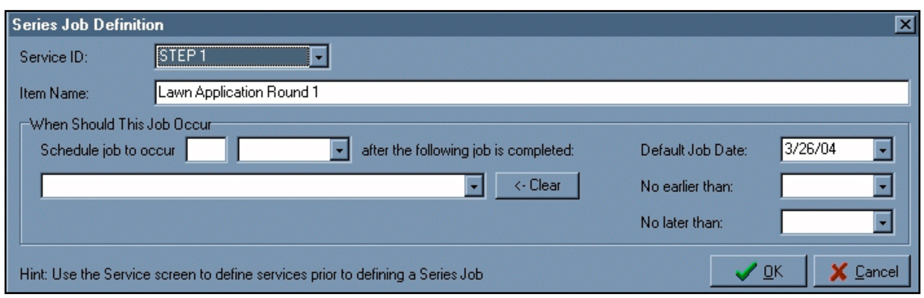
- Remember you can define the number of steps in your "Job Series."
- Make sure you are on the Schedule section of Gopher and on the "Job Series" tab.



- Click the "New" button.
- A "Job Series" window will appear. This window has three tabs, "Job List", "Customer Assignment", and "Series Description."



- "Job Series Name" - Enter your series description, such as 'Established lawn with weeds.'
- Click on the "Job List" tab.



- Click the "New Job" button.
- A "Series Job Definition" window will appear.

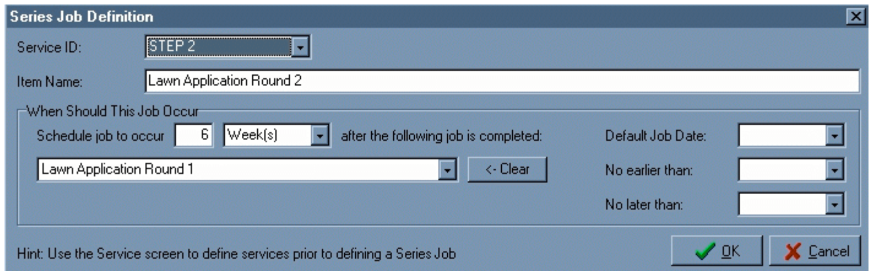
- "Service ID" - Use the drop down box to choose a service that you previously entered into the "Service" page located on the green navigation bar. For our example we will choose the first application in our "Job Series" as 'Crab Grass Preventer and Lawn Food.'
- "Item Name" - This field will be filled in automatically however you can edit this or add to the name.
- "Default Job Date" - Choose the default date for this first step. You may want to choose the end of March.

- Click the "OK" button.

Schedule - Creating a 4 or 5 Step, Lawn Application Program.

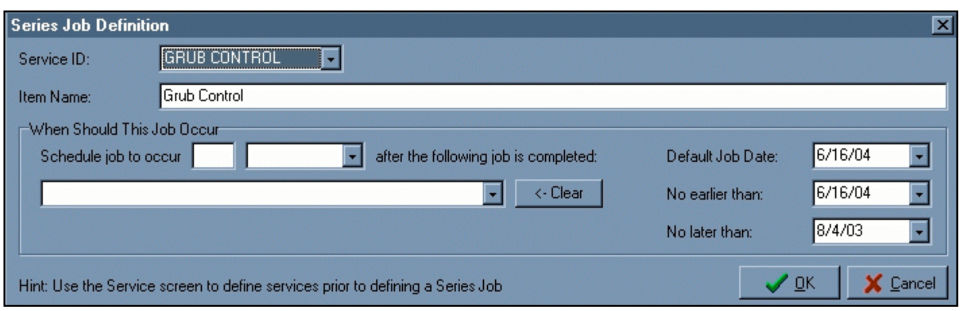
Step 2:

- You will find yourself back at the "Job List" tab. We have completed step one in our example "Job Series", let's continue on to step two.
- Stay on the "Job List" tab.
- Click the "New Job" button.
- The "Series Job Definition" window will re-appear.



- "Service ID" -
  This time we will choose the second step of our example "Job Series" which will be the service of applying 'Weed Killer and Lawn Fertilizer.'
- "Item Name" - This field will show that the service of 'Weed Killer and Lawn Fertilizer' has been chosen.
- "Schedule Job To Occur" - Let us choose '2 Month(s)' after the following job is completed.
- In the drop down box below let us choose the 1st step in our series that we had just entered which was 'Crabgrass Preventer and Lawn Food.'
- Next we have the option to set a "Default Date" or use the fields ("No earlier than" in addition to "No later than.") For this example I will do the following
- "Default Job Date" - I will leave this blank. (use this when you want to set a specific date for the job to be performed.)
- "No Earlier Than" - I will set this date to the beginning of May.
- "No Later Than" - I will set this date to the beginning of June.
- Click the "OK" button.

Step 3.



- You will find yourself back at the "Job List" tab. We have completed step two in our example "Job Series", let's continue on to step three.
- Stay on the "Job List" tab.
- Click the "New Job" button.
- The "Series Job Definition" window will re-appear.
- Grub Control Example
- Choose the Service ID from a service you have already entered into your Service section of Gopher.
- Enter the Item Name.
- Choose a Default Date. (optional *)
- Choose a No Earlier Than Date. (optional *)
- Choose a No Later Than Date. (optional *)
- optional - You can use a default date with no (earlier or later than date) or
- use the (earlier or later than date) with no default date or Use them all.

Schedule - Creating a 4 or 5 Step, Lawn Application Program.

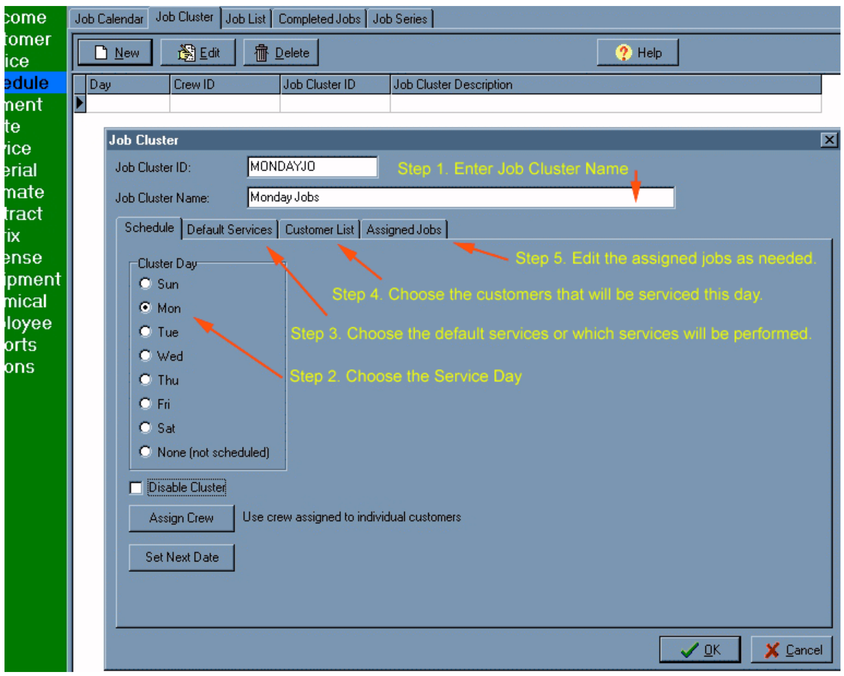
Step 4:

- You will find yourself back at the "Job List" tab. We have completed step three in our example "Job Series", let's continue on to step four.
- Stay on the "Job List" tab.
- Click the "New Job" button.
- The "Series Job Definition" window will re-appear.
- "Service ID" - This time we will choose the fourth step of our example "Job Series" which will be the service of applying 'Winterizer.'
- "Item Name" - This field will show that the service 'Winterizer' has been chosen.
- "Schedule Job To Occur" - Let us choose '2 Month(s)' after the following job is completed.
- In the drop down box below let us choose the 3rd step in our series that we had just entered, which was 'Lawn Food.'
- Next we have the option to set a "Default Date" or use the fields ("No earlier than" in addition to "No later than.") For this example I will do the following
- ·"Default Job Date" - I will leave this blank. (use this when you want to set a specific date for the job to be performed.)
- "No Earlier Than" - I will set this date to the beginning of September.
- "No Later Than" - I will set this date to the beginning of October.
- Click the "OK" button.
- Click on the "Customer Assignment" tab.
- Click the "Assign Job Series" button.
- A "Select Customer" window will appear.
- Choose the Customer.
- Click the "OK" button.
- Select the start date for this customer.
- Click the "OK" button.
- Click on the "Series Description" tab.
- You can enter a detailed description of this "Job Series" here.
- Click the "OK" button.

Schedule - How do I use Job Clusters?

- The Job Cluster Schedule option is a great way to schedule many jobs at once say for instance if all of your Monday customers are the same or all your Tuesday customers are, etc etc..

- Make sure you are on the "Job Cluster" tab, located on the Schedule page.
- Click the "New" button.
- A "Job Cluster" window will appear. This window has four tabs: "Schedule", "Default Services", "Customer List", and Assigned Jobs."
- "Job Cluster Name" - Enter the name of the route.
- Click on the "Schedule" tab.
- "Cluster Day" - Choose the day this route will always be scheduled on. Choose "None" if you want the option to schedule this route on demand regardless of day, such as in the case of snowplowing.
- "Disable Cluster" - Check this box to disable this Cluster. Possibly at the end of your servicing season. It will stop scheduling the job clusters.

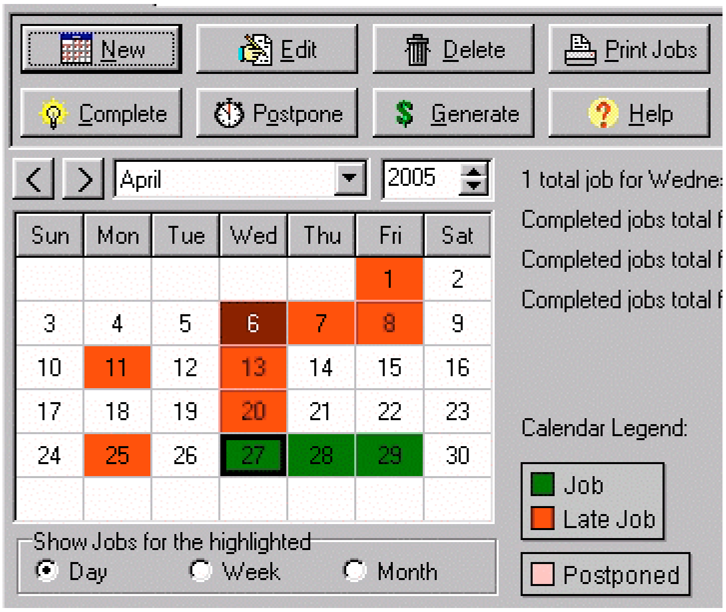


- "Assign Crew" - Use this button to choose the crew to perform this "Job Cluster."
- "Set Next Date" - Use this button to set the next date this Cluster is to be performed.
- Click on the "Default Services" tab.
- "Add Service" - Use this to button to add a default service to this "Job Cluster."
- Click on the "Customer List" tab.
- "Add Customer" - Use this button to add customers to this "Job Cluster."
- Click on the "Assigned Jobs" tab.
- You can review all the jobs that are scheduled for this"Job Cluster" on this tab. You can also add, edit and delete jobs.
- "New Jobs" - Use this button to add extra jobs for this "Job Cluster" that are customer specific. For example, if this is a snowplow job cluster, you can also make sure that certain customers who request sanding or salting have that job scheduled along with their snowplowing.
- Click the "OK" button.
- If you have created your new "Job Cluster" with a assigned date, you should see a day that is green on your "Job Calendar" tab. Click on that assigned day and you will see the jobs appear in the job list below the calendar.
- **Snow Plowing or Fall Clean up idea:** Another use for Job Clusters is for snow plowing. You can set up the clients you plow and what specific services they receive. Set the cluster day to None (not scheduled) and click the Disable Cluster checkbox. When it snows, click the Set Next Date button and choose the day it is snowing. You will immediately populate your schedule with all the customers that need to be serviced.

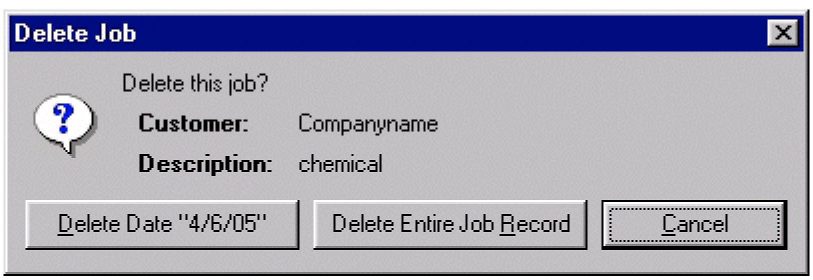
Schedule - How to delete a job from the schedule?

When you click on the delete button in your schedule page, you have the option to delete either the day's job or all the future job records.

- Step 1. Highlight the job day you want to delete records for.
- Step 2. If you want to delete a specific job from the day, highlight that in the list below the calendar and click the delete button.



- Step 3. Choose if you want to delete ALL records of this job so it will not appear again or job this instance of the job.



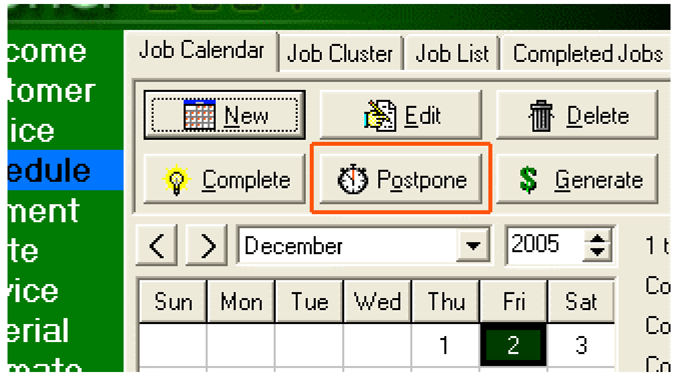
Schedule - Where do I add extra unscheduled jobs I have performed so I won't forget to bill the customer?

Question: What does the "Completed Jobs" tab do?
Answer: It allows you to review all jobs that you have marked as being completed on your "Job Calendar" but haven't been "
Generated" into invoices yet. You can Add, Edit, or Delete "Completed Jobs" as needed.

- You may want to add additional jobs here that were not scheduled but you want to appear on the next invoice. For instance if while you are on a job site a customer asks you to do an additional service. When you get back to your office you can add the job here so you won't forget to bill them for it.

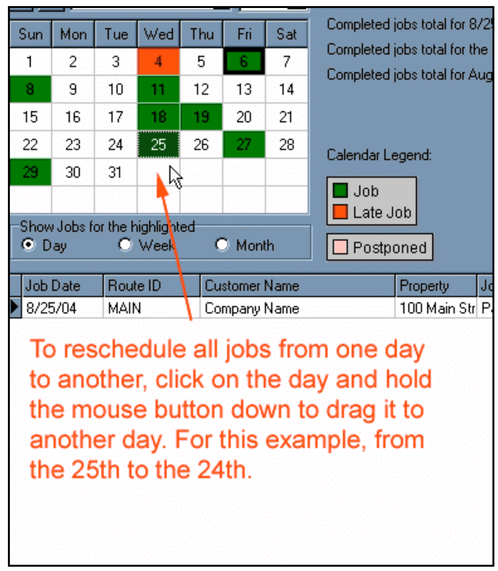
Schedule – Postpone Jobs.

- You can postpone a days jobs by clicking on the day on your calendar and then clicking the postpone button to select a new day.



To postpone ALL jobs for the day

- Use the drag and drop method
- Click and hold down your mouse on the day you want to reschedule all of your jobs from. The graphical example will show moving jobs from the 25th to the 24th.
- Release the mouse button over the day you want your jobs moved to.
- You will now see the jobs appear on the new day.

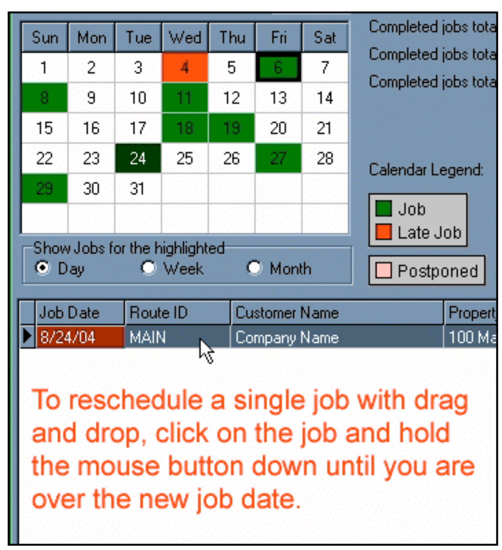


To postpone a SINGLE job for the day

- Or you can click on the day and your days jobs will appear below the calendar.
- Then click on a specific job in your job list, drag and drop that job onto the new day you want the job assigned to.

Question: What if it rains a few days in a row and you don't want the job to be scheduled twice on the same week?"

Answer: When you schedule your jobs, you can use the Custom job type and then this will give you the option to have a specific minimum number of days between this job. You could set the minimum number of days between the job to 7 days, for example.

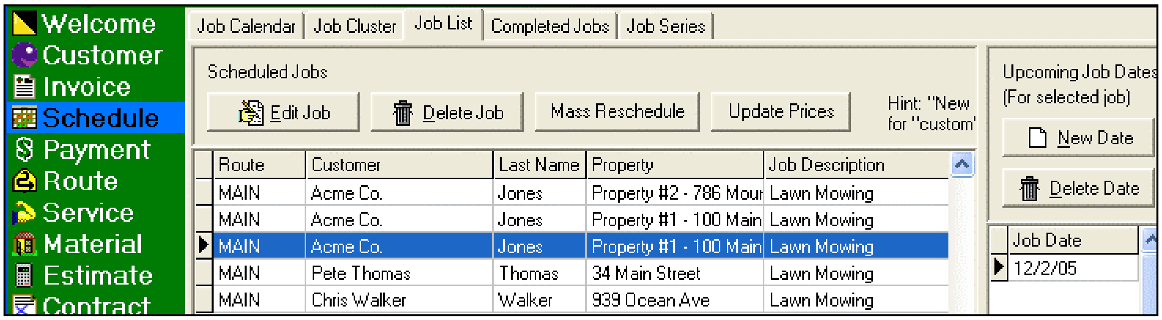


Schedule – How to view a customer's upcoming job dates.

Schedule Job List Tab

Question : What does the "Job List" tab do?
Answer: The "Job List" tab allows you to review "Scheduled Jobs" and "Upcoming Job Dates." You can Add or Delete "Upcoming Job Dates." You can also Edit or Delete "Scheduled Jobs."

- Choose a job in the "Scheduled Jobs" list and the jobs "Upcoming Job Dates" will appear on the right. You can then highlight and manipulate the jobs as needed.



Mass Reschedule button - Highlight jobs in your scheduled jobs list. To Highlight multiple jobs at once, hold down your ctrl key as you click on jobs or use your shift key. When you have chosen the jobs you want to reschedule, click the mass reschedule button and then it will allow you to choose a new start and end date for these jobs. Use this at the beginning of the season to reschedule your jobs from the past year.

Schedule - Complete jobs for the wrong job date. What do I do now?

If you have accidentally completed jobs on the wrong day in your schedule. You can do a couple of things to resolve this.

1. Go into your **Completed Jobs Tab** (p.68) in the Schedule page and edit the job to reflect the correct completed job date.

2. Delete (p.67) the completed jobs and reschedule them.

- Use the **one time job** (p.61) schedule feature.
- or
- Edit that job in your schedule to include the date missed and click the Build Dates button.

Schedule - How to bill in advance.

- Create an **auto billing** (p.24) line item which will say something to the effect of monthly maintenance fee. Auto billing items are added to your invoice when you generate.
- Then **schedule** (p.56) your weekly cuts as you normally would with a fee of $0.00, so that you don't double bill your customers.
- At the end of the month or the beginning, generate your invoices. Your invoice will then have a line item that will show a monthly maintenance fee for the upcoming month and the dates you had previously serviced their lawn.
- Here is an example of the invoice you could create.

The customer will see each date of the lawn mowing. There is no charge for each cut.

DATE	DESCRIPTION	AMOUNT
	Balance Forward	$105.00
3/10/05	Lawn Mowing	
3/17/05	Lawn Mowing	
3/24/05	Lawn Mowing	
3/31/05	Lawn Mowing	
3/31/05	Monthly maintenance for April	$225.00
	Total for Invoice #5-6	$225.00
	AMOUNT DUE	**$330.00**

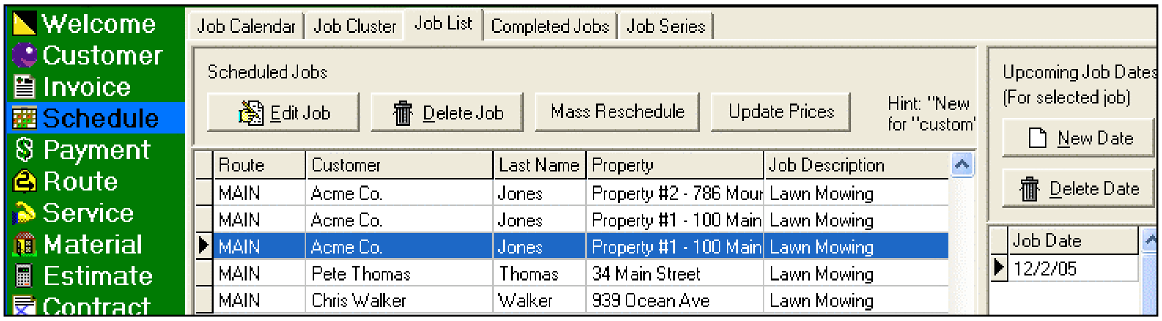
DATE	DESCRIPTION	AMOUNT
	Balance Forward	$105.00
3/10/05	Lawn Mowing	
3/17/05	Lawn Mowing	
3/24/05	Lawn Mowing	
3/31/05	Lawn Mowing	
3/31/05	Monthly maintenance for April	$225.00
	Total for Invoice #5-6	$225.00
	AMOUNT DUE	**$330.00**

This auto-billing line item shows the monthly maintenance fee for **NEXT** month which is April.

Schedule - What does the Job List Tab do?

Question : What does the "Job List" tab do?
Answer: The "Job List" tab allows you to review "Scheduled Jobs" and "Upcoming Job Dates." You can Add or Delete "Upcoming Job Dates." You can also Edit or Delete "Scheduled Jobs."

- Choose a job in the "Scheduled Jobs" list and the jobs "Upcoming Job Dates" will appear on the right. You can then highlight and manipulate the jobs as needed.



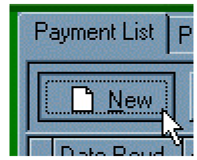
Payment

The basic function of the "Payment" page is to enter payments you receive from customers. The simplest way to enter payments is by using the Gopher Bar Code Scanner to scan in bar codes on your payment stubs.

Frequently Ask Questions for the payment section.

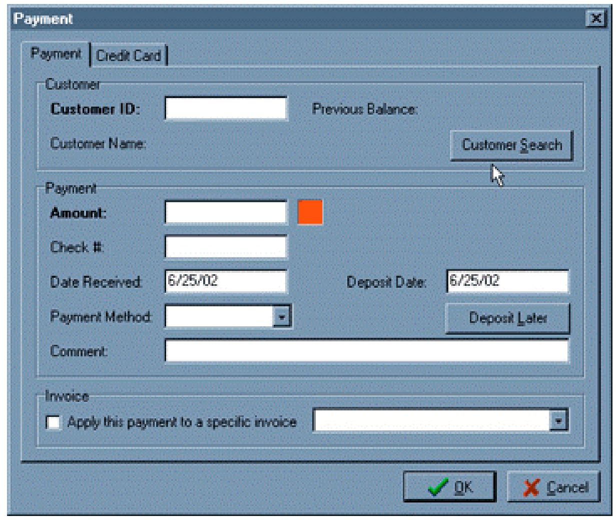
- How to enter a new payment. Page - **75**
- How to use Quick Pay to enter your payments. Page - **52**
- How to use the Bar Code Scanner to enter your payments. Page - **76**
- How to set payment terms. Page - **26**

Payment - Entering a new Payment.

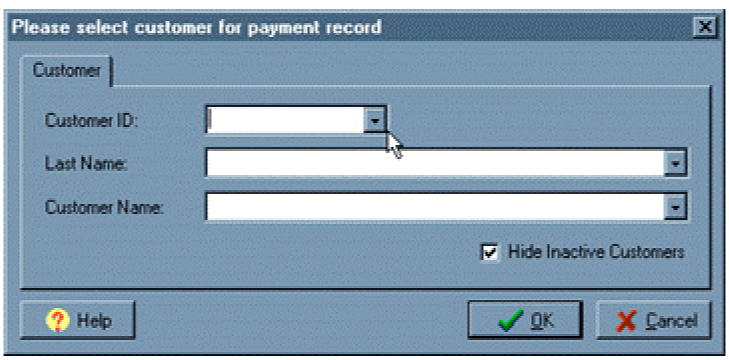


- Remember you can use Quick Pay (p.52) to enter your payments or follow the example below.
- Make sure you are on the tab "Payment List."
- Click the "New" button

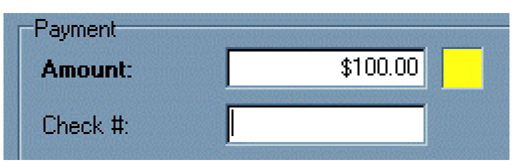
- A "Payment" window will appear. This window has two tabs: "Payment" and "Credit Card."
- Click on the "Payment" tab.



- Click on the "Customer Search" button and choose a customer.



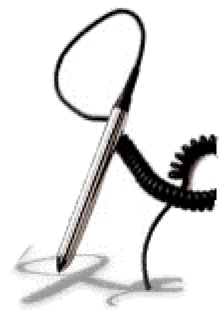
- "Amount" - Enter the amount of the payment.



- There are three colors associated with the "Amount." The color square gives you a quick visualization if the "Amount" entered matches the exact amount owed in a previous invoice.
- Red means no payment has been entered.
- Yellow means the "Amount" does NOT match an unpaid invoice.
- Green means the "Amount" matches an unpaid invoice.
- Click the "OK" button.

Payment - How to use the Bar Code Scanner to enter your payments.

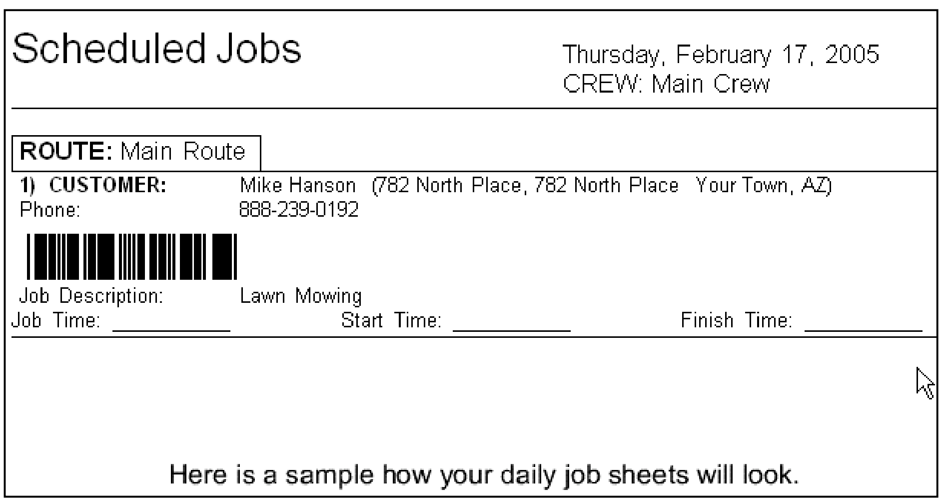
How to get the barcode scanner working.



- First thing you need to do is go to the Options page at the bottom of the green bar that runs along the left side of your program.
- Click on the register Gopher button.
- Click on the modules tab and enter the barcode registration number that was sent to you in your invoice.
- Make sure you have the barcode plug hooked into the Y connector with the keyboard and then into the keyboard input.
- Click on your schedule section of the program, click the complete button, then the some jobs button, then scan across the job sheets to mark the jobs complete.

- What do you do if your customers don't send back their payment stub? What will you scan in? Use the upcoming payments report.

- You can toggle the barcode printing on the schedule page within the options section.



Scheduled Jobs
Thursday, February 17, 2005
CREW: Main Crew

ROUTE: Main Route

1) CUSTOMER: Mike Hanson (782 North Place, 782 North Place Your Town, AZ)
Phone: 888-239-0192

Job Description: Lawn Mowing
Job Time: ___________ Start Time: ___________ Finish Time: ___________

Here is a sample how your daily job sheets will look.

- To enter your payments, click on the payment section and click the scan button, then scan your payment barcodes!

Invoice No.	1-6
Customer	#1 Acme Co.
Amount Due	**$269.75**
Payment	$

Route

The basic function of the "Route" page is to set up a geographic grouping of customers to be serviced by a crew. In most cases, you will have one route per crew. At the top of the Route window, you will see two main tabs: "Route List" and "Crew List." You will see database navigation buttons at top. Use the New, Edit, and Delete buttons to operate your Route database.
The order in which your customers are set in the Route page is the order they are printed out in your daily job schedules. Order the customers as if you were going to visit one after the other straight through the entire route.

Frequently Ask Questions for the route section.

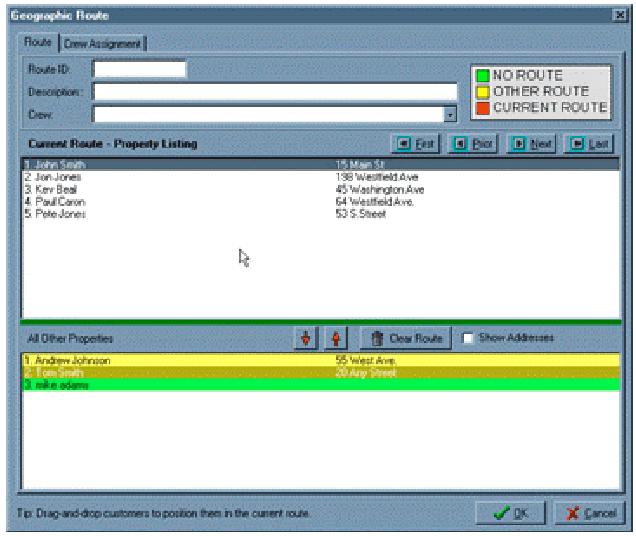
- How to enter a new route. Page - **78**
- How do I order customers in job sheets? Page - **8**
- I want to print out a report of my routes and the customers in each route. Page - **119**

Route - How to enter a new route.

<u>Remember:</u> The order in which your customers are set in the Route page is the order they are printed out in your daily job schedules. Order the customers as if you were going to visit one after the other straight through the entire route. Normally you will have 1 route per crew.

- Make sure you are on the tab "Route List."

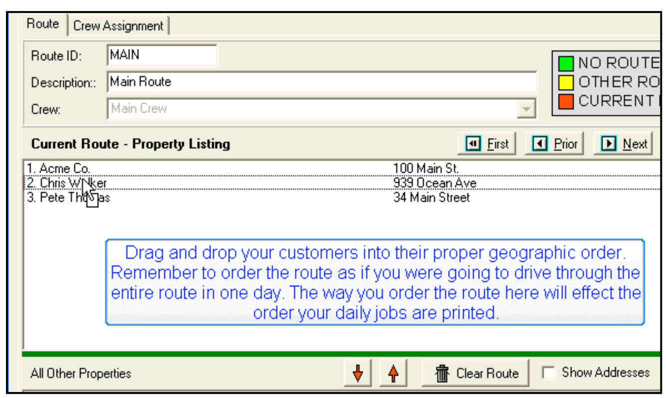
- Click the "New" button.
- A "Geographic Route" window will appear. This window has two tabs: "Route" and "Crew Assignment."
- Click on the "Route" tab.
- "Route ID" - Enter a route ID for example: 'North Route' or 'route 1.'
- "Description" - Enter a description for this route. Ex. "northern side of town."
- "Crew" - Use the drop down box to apply a crew if applicable.
- Highlight properties from the "All Other Properties" list and use the Red Arrow buttons to move the properties up to the "Current Route" list that will be included in this route.



- When you have moved up all the properties that will be serviced into the "Current Route" list, use the "First", "Prior", "Next", and "Last" buttons to order the property list in geographic order.

- Or you can drag and drop the customers into their proper geographic position.

- Click the "OK" button.
- "Clear Route" button - This will remove all the properties in the "Current Route" list.
- "Show Addresses" button - This will show the address of the properties in your list.



Service

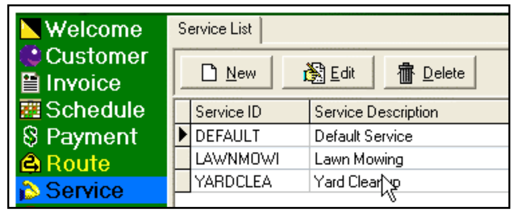
The basic function of the "Service" page is to set up the listing of services your company provides. At the top of the Service window, you will see one tab: "Service List." Use the New, Edit, and Delete buttons to operate your Service database.

Frequently Ask Questions for the service section.

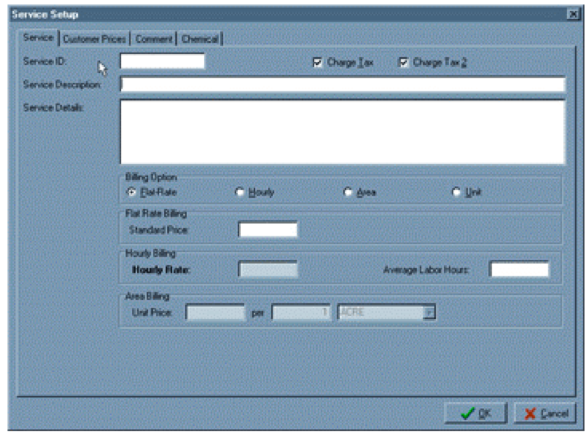
- How to enter a new Service. Page - **80**

Service - How to enter a new service.

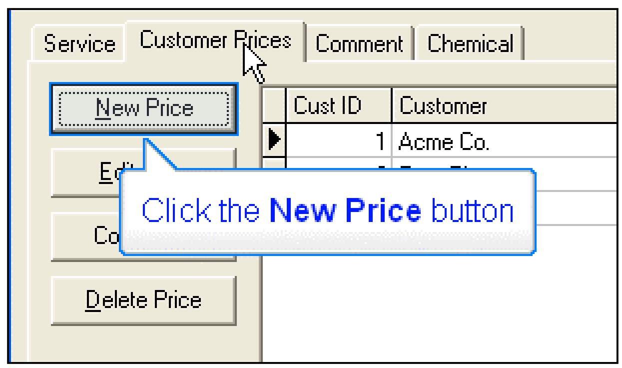
- Make sure you are on the tab "Service List."
- Click the "New" button.



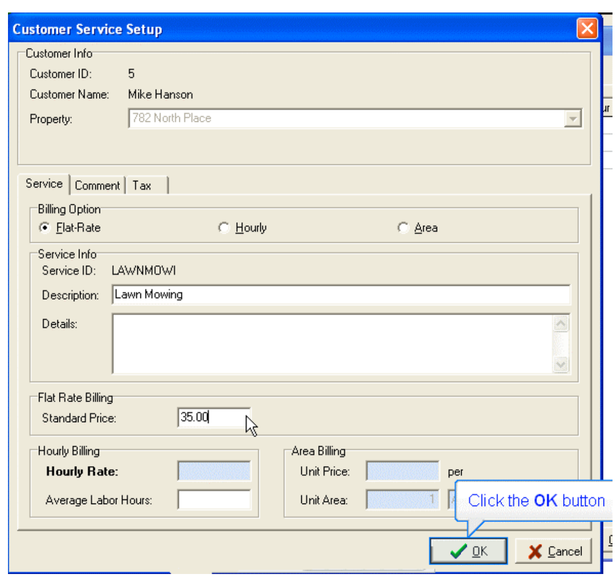
- A "Service Setup" window will appear. This window has four tabs: "Service", "Customer Prices", "Comment" and "Chemical."
- Click on the "Service" tab.
- "Service ID" - Enter the Service ID.
- "Service Description" - Enter the description of the service.
- "Billing Option" - Choose "Flat-Rate."
- "Standard Price" - Enter the default price for this service or leave it blank.



- Click on the Customer Prices tab and click the new button.



- Here is where you will set this service's specific price for each customer.
- Click the "OK" button.



Material

The basic function of the "Material" page is to set up the listing of materials your company provides and keep track of inventory. At the top of the Material window, you will see three tabs: "Inventory List", "Vendor", and "Unit of Measure." Use the New, Edit, and Delete buttons to operate your material database.

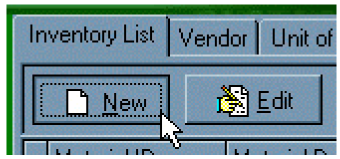
Frequently Ask Questions for the material section.

- How to enter a new Material. Page - **82**

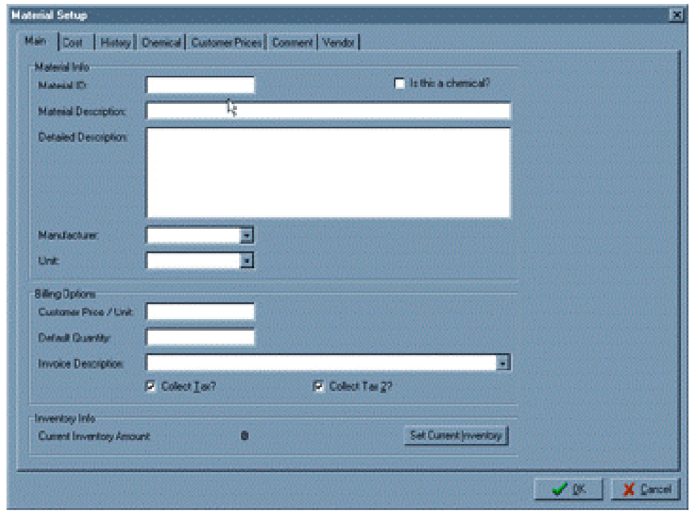
Material - How to enter a new material.

- Click on the Material section.
- Make sure you are on the tab "Inventory List."

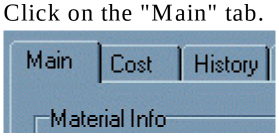
- Click on the "New" button.



- A "Material Setup" window will appear. This window has seven tabs: "Main", "Cost", "History", "Chemical", "Customer Prices", "Comment", and "Vendor."

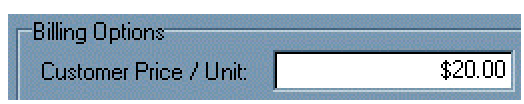


- Click on the "Main" tab.

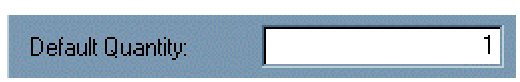


- "Material ID" - Enter a material ID.

- "Material Description" - Enter a description of this material.



- "Customer Price / Unit" - Enter the price of the material.
- "Default Quantity" - Enter the default quantity of this material.



- "Collect Tax" - Check this box if sales tax is to be applied to this material."

- Click the "OK" button.

Estimate

The basic function of the "Estimate" page is to create estimates to present your customers to sign. You can add text in the estimate to make it a legally binding contract. At the top of the Estimate window, you will see one tab: "Estimate List." Use the New, Edit, and Delete buttons to operate your estimate database.

The "Convert To Invoice" button allows you convert a highlighted estimate into an invoice. Simply highlight the estimate in your list that you want to convert to an invoice and click the "Convert To Invoice" button.

The "Set Defaults" button (p.85) allows you to set up default settings for your estimates so you don't have to repeat the same information every time you create an estimate. To set the defaults follow the example below.

The "Clear Defaults" button, allows you to clear the defaults you have previously entered.

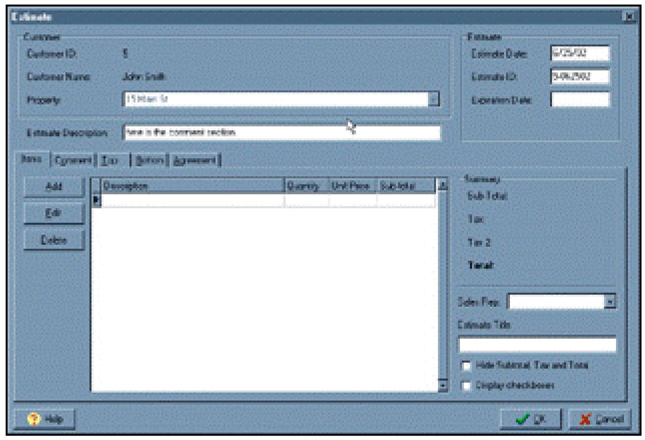
Remember : You can set default values (p.85) so you don't have to re-enter the same data every time.

Frequently Ask Questions for the estimate section.

- How to enter a new Estimate. Page - **84**
- Sample estimate header / footer wording? Page - **85**
- How can I change the estimate title? Page **85**
- How to set estimate defaults. Page - **85**

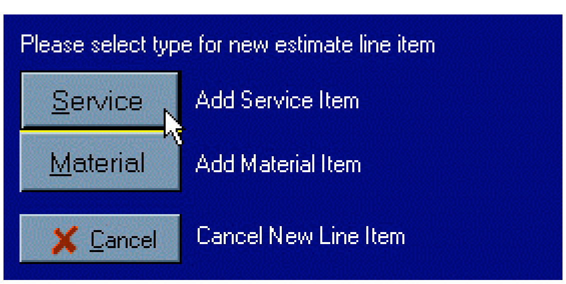
Estimate – How to enter a new estimate.

- Make sure you are on the estimate section of Gopher and the estimate list tab.
- Click on the "New" button.
- A "Select Customer for New Estimate" window will appear.
- Choose the customer.
- An "Estimate" window will appear.



- "Estimate Date" - The date this estimate is created.
- "Estimate ID" - The unique ID for this estimate.
- "Expiration Date" - The date the estimate is valid for.
- "Property" - Choose a property this estimate applies to.
- "Estimate Description" - Enter a description for this estimate.
- "Sales Rep" - Use the drop down box to choose the sales rep associated with this estimate.
- "Estimate Title" - Enter the title of this estimate.
- "Hide Subtotal, Tax and Total" check box - Check this box if you want to hide the subtotal, tax and total on the estimate printout.
- "Display checkboxes" - This will show a box to the left of each line item, so the customer can check which items they have approved.
- Below you will see five tabs: "Item", "Comment", "Top", "Bottom", and "Agreement."

- Click on the "Items" tab.
- Click on the "Add" button.
- Choose to add either a "Service" or a "Material."

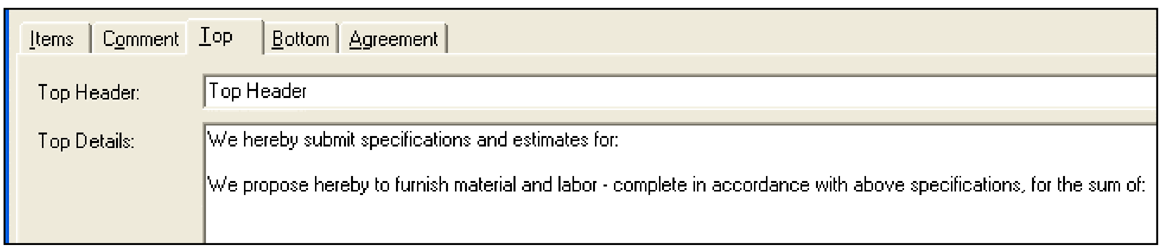


- Click the "OK" button.
- You will find yourself back at the "Estimate" window.
- Click the "OK" button again.

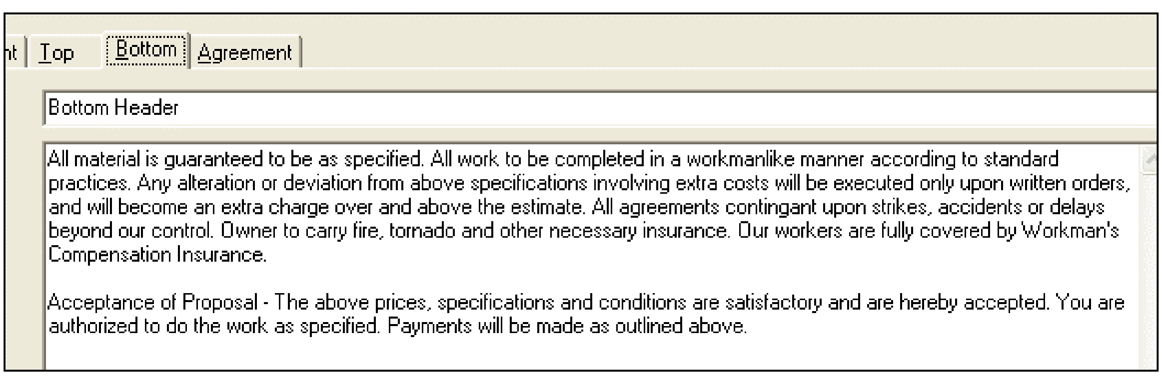
Estimate – Default settings.

Set default values so you don't have to re-enter the same data every time.

- Ex. Setting defaults for your estimate.
- Click on the "Set Defaults" button.
- An "Estimate" window will appear.
- This window has five tabs: "Item", "Comment", "Top", "Bottom", and "Agreement."
- Click on the "Top" tab.
- "Top Header" - Enter the Top Header. This will appear as a bold line of text above the line items.
- "Top Details" - Enter the Top Details. This will appear below the header and is indented as well as in normal text.
- This would appear on your estimate in the highlighted **RED** area below.

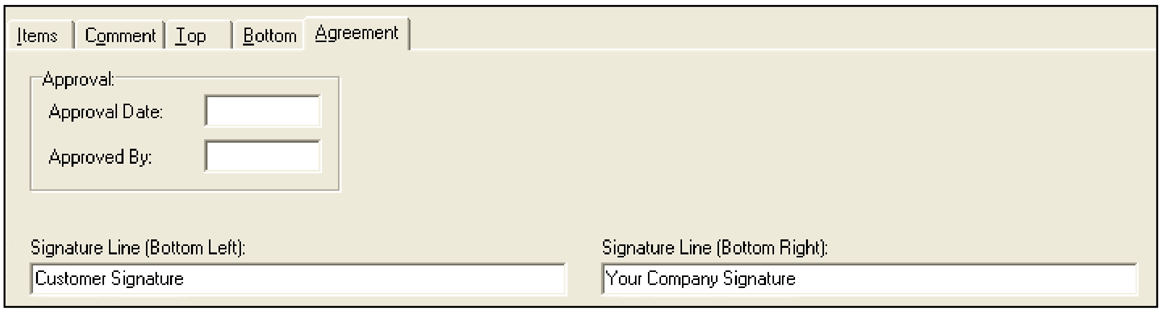


- Click on the "Bottom" tab.
- "Bottom Header" - Enter the Bottom Header. This will appear as a bold line of text below the line items.
- "Bottom Details" - Enter the Bottom Details. This will appear below the header and is indented as well as in normal text.
- This would appear on your estimate in the highlighted **YELLOW** area below.

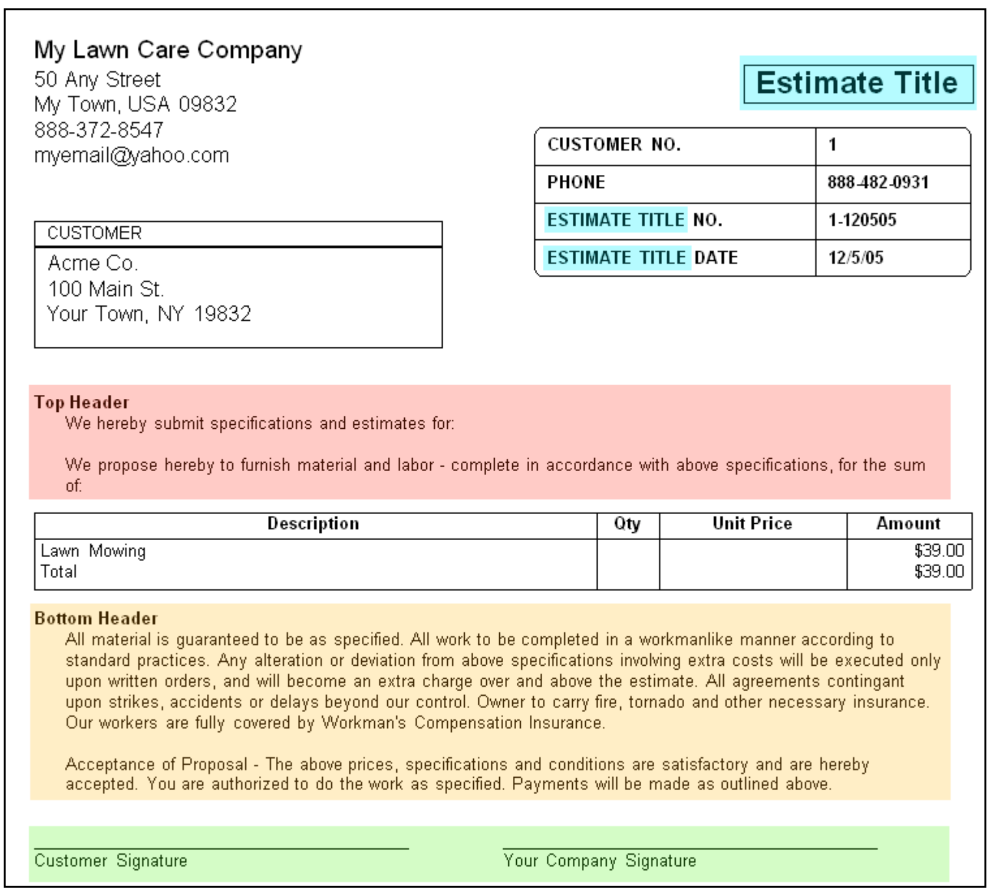


Estimate – Default settings.

- Click on the "Agreement" tab.
- "Signature Line (Bottom Left):" - Enter the text that will appear below the bottom left signature line.
- "Signature Line (Bottom Right):" - Enter the text that will appear below the bottom right signature line.
- Here is some sample wording you can use for the AGREEMENT section.
- This would appear on your estimate in the highlighted **GREEN** area below.



- This is how your sample estimate would appear.



My Lawn Care Company
50 Any Street
My Town, USA 09832
888-372-8547
myemail@yahoo.com

Estimate Title

CUSTOMER NO.	1
PHONE	888-482-0931
ESTIMATE TITLE NO.	1-120505
ESTIMATE TITLE DATE	12/5/05

CUSTOMER
Acme Co.
100 Main St.
Your Town, NY 19832

Top Header
We hereby submit specifications and estimates for:

We propose hereby to furnish material and labor - complete in accordance with above specifications, for the sum of:

Description	Qty	Unit Price	Amount
Lawn Mowing			$39.00
Total			$39.00

Bottom Header
All material is guaranteed to be as specified. All work to be completed in a workmanlike manner according to standard practices. Any alteration or deviation from above specifications involving extra costs will be executed only upon written orders, and will become an extra charge over and above the estimate. All agreements contingant upon strikes, accidents or delays beyond our control. Owner to carry fire, tornado and other necessary insurance. Our workers are fully covered by Workman's Compensation Insurance.

Acceptance of Proposal - The above prices, specifications and conditions are satisfactory and are hereby accepted. You are authorized to do the work as specified. Payments will be made as outlined above.

Customer Signature　　　　Your Company Signature

Contract

The contract feature is used when you are going to charge a customer a flat rate fee each month regardless of how often you service them that month. It has a begin and end date.

You wouldn't use the contract feature to present your customers with something to sign. For that you would do is use the estimate feature (p.83).

You would use the contract feature in Gopher when you charge a customer a flat service fee every month regardless of how often you service their property. At the top of the Contract window, you will see one tab: "Contract List." Use the New, Edit, and Delete buttons to operate your contract database. At the bottom of the screen you can use the "Sort Contract List By" drop down box to sort your contract list.

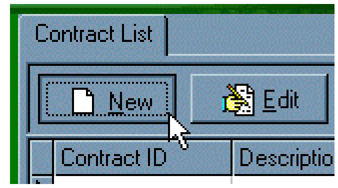
The Contract feature is similar to the Auto-Billing feature located in the Customer page, except that a Contract has a set start date and end date.

Frequently Ask Questions for the contracts section.

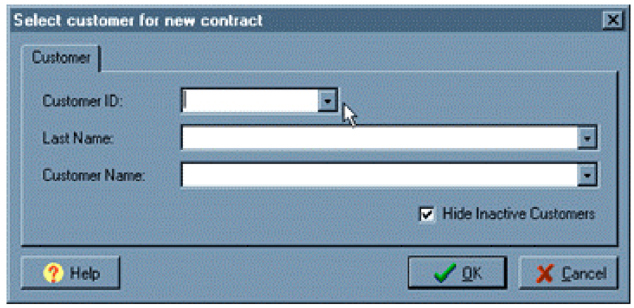
Question: Will setting up a contract automatically schedule that customer into my scheduled jobs?
Answer: No. Creating a contract does not schedule a job. To schedule a job associated with a contract follow the example on the "Schedule" (p.55) page in this manual. When you schedule a job associated with a contract, set the schedule job price to $0.00 so the customer isn't double billed.

- How to enter a new Contract. Page - **88**
- Contracted Services...How to example? Page - **90**
- How to use the Contract 'Special Fields' example. Page - **91**

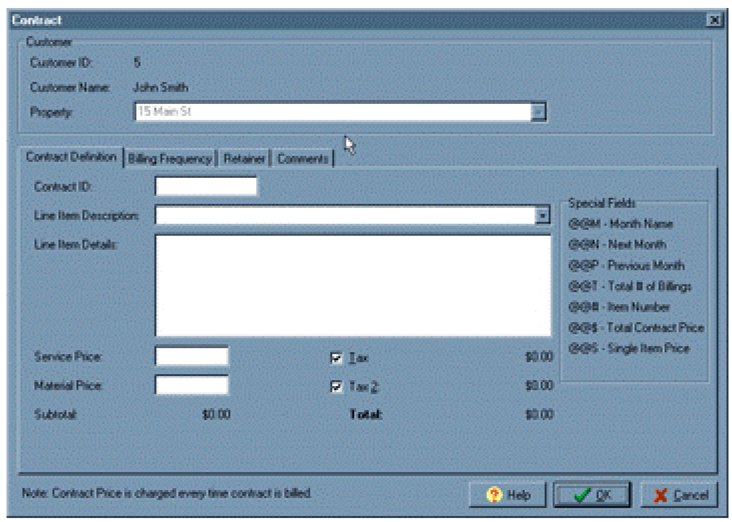
Contract - How to enter a new Contract.

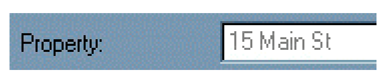


- Make sure you are on the tab "Contract List."
- Click on the "New" button.
- A "Select Customer for New Contract" window will appear.
- Choose the customer.

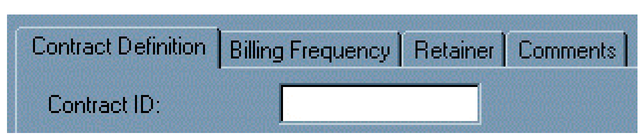


- Click the "OK" button.
- A "Contract" window will appear.



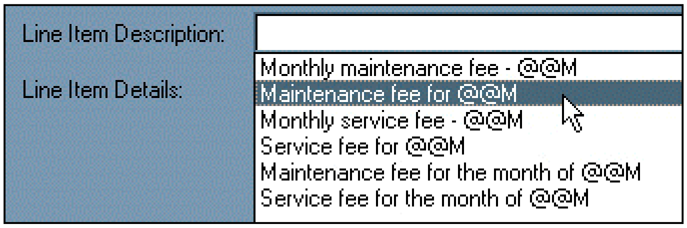


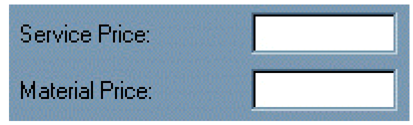
- "Property" - Use the drop down box to choose a property if this customer has multiple properties.
- Click on the "Contract Definition" tab.



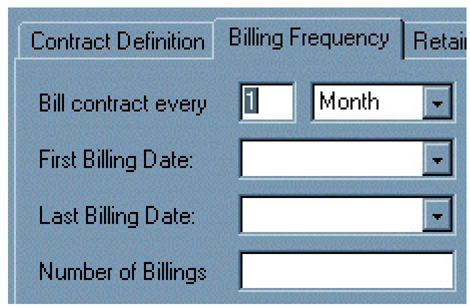
- "Contract ID" - Enter a contract ID.
- "Line Item Description" - Use the drop down box to choose a line item description or type in your own. Note the "Special Fields" at the right of the window. You can use these "Special Fields" to customize your description, remember that you must type them in the exact way they appear on the right. A Special Field of @@M will insert the current month's name in it's place.

Contract - How to enter a new Contract.



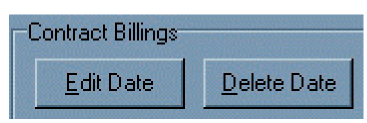


- "Line Item Details" - Use this field to enter a longer detail for your contract.
- "Service Price" - Enter the service price for the contract.
- "Material Price" - Enter the material price for the contract.



- Click on the "Billing Frequency" tab.
- "Bill contract every" - Choose (1 Month) if you want to bill this contract once a month.
- "First Billing Date" - Choose the first date you want this customer billed for this contract.
- "Last Billing Date" - Choose the last date you want this customer billed for this contract.
- "Number of Billings" - This field will be generated by calculating the difference in your first and last billing dates. You can also edit this field.
- **For example:** Say a customer calls up and tells you they want you to perform a contract service but only want to be billed X amount of times. You can set the frequency, start date and then enter the "number of billings". Build the contract dates by clicking on the button and you are all set.
- "Bill on the last day of the month" check box - Check this box if you want this contract to be generated on the last day of the month.

- "Generate Contract Dates" button - Click this button to recalculate the "Contract Billing" dates if you have manipulated the dates.



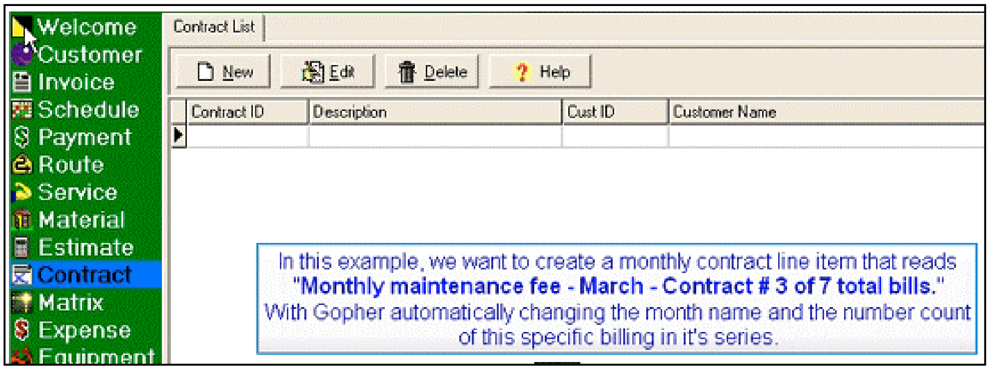
- "Edit Date" - Click this button to edit a highlighted "Contract Billing" entry.
- "Delete Date" - Click this button to delete a highlighted "Contract Billing" entry.
- Click the "Comments" tab.
- "Private Comment" - Enter a private comment for this contract.

Contract - Contracted Services...How to example?

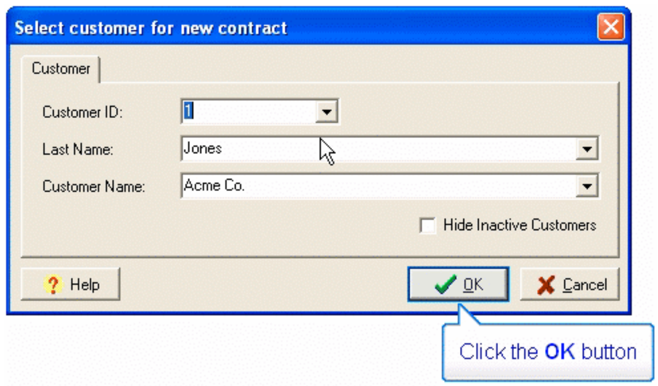
- **Question:** I have a Home Owners Association that has multiple houses for only one billing. This is contracted in 12 equal payments with full service lawn maintenance. How do I individualize each property and the work performed for a given month and keep the price set at the same for that property. For example: I have set each property to show the standard monthly charge with a service ID of Lawn Mowing Service. But, on the off season I'm not mowing and the price is still the same. I don't want the bill to say Lawn Mowing Service. How can I do this to show that I trimmed the hedges and other stuff with the contracted price remaining the same.
- **Answer:** You can schedule in these jobs and make the job fee $0.00. Then have your monthly contract description say something to the effect of 'monthly contract service.'

Contract - Contracts Special Fields Example.

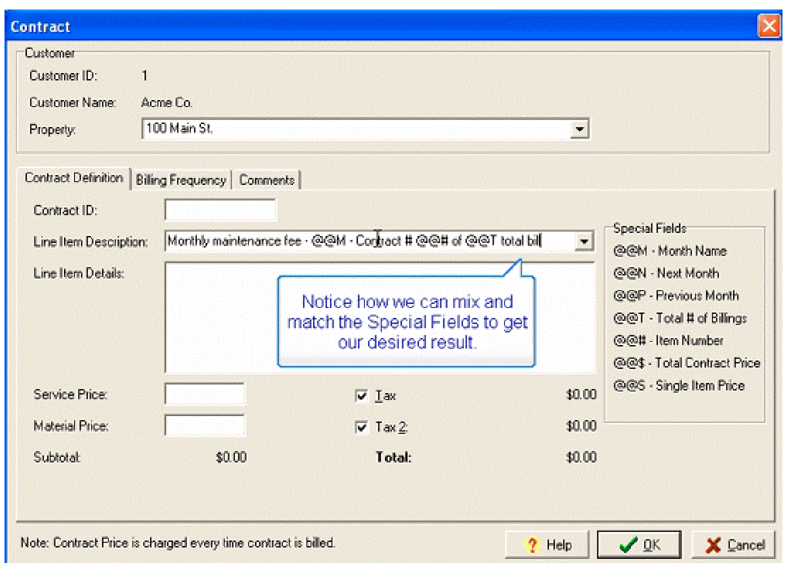
- Using the Contract 'Special Fields' to create a contract billing line item that might say "Monthly contract for APRIL # 3 of 8 billings."
- Step 1. In this example we will create a monthly contract line item that will appear in the customer's invoice as "Monthly Maintenance Fee - March - Contract #3 of 7 total bills".



- Step 2. Make sure you are on the Contract section and click the New button. Then choose the customer this contract is for.

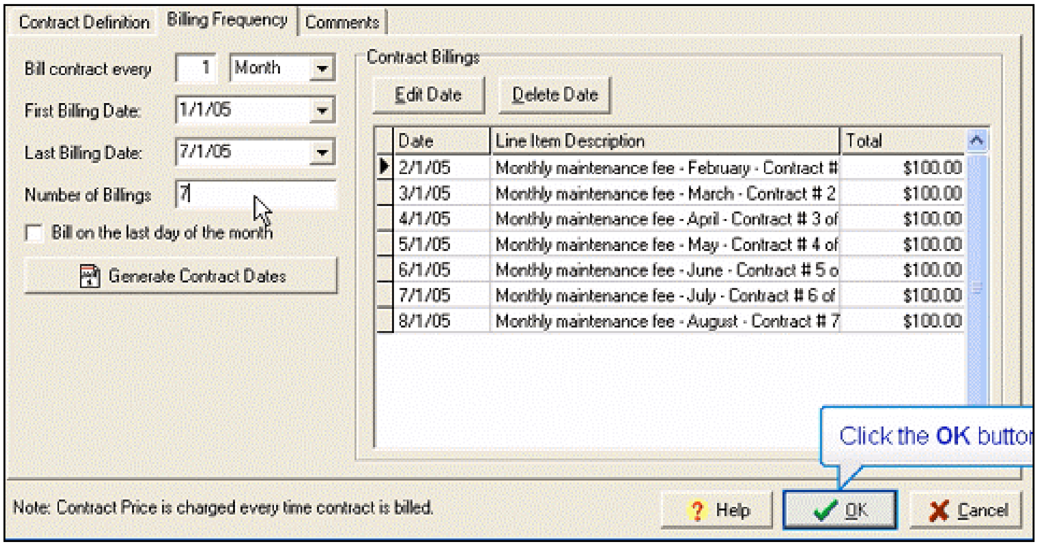


- Step 3. The Contract window will appear. The Special Fields are shown on the right side of this window. We can use them however we need to in order to achieve our desired results in the Line Item Description. Remember to enter a Service Price. That is how much the contract line item will charge.

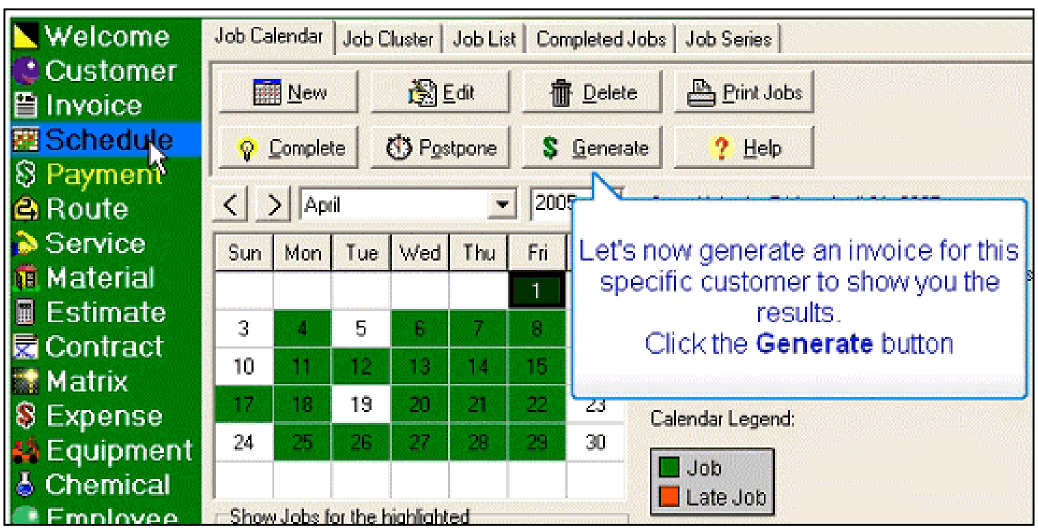


Contract - Contracts Special Fields Example.

- Step 4. Click on the Billing Tab. Set the Bill Contract Every field and then choose the First Billing Date and Last Billing Date along with the Number Of Billings. Click the OK button when finished.

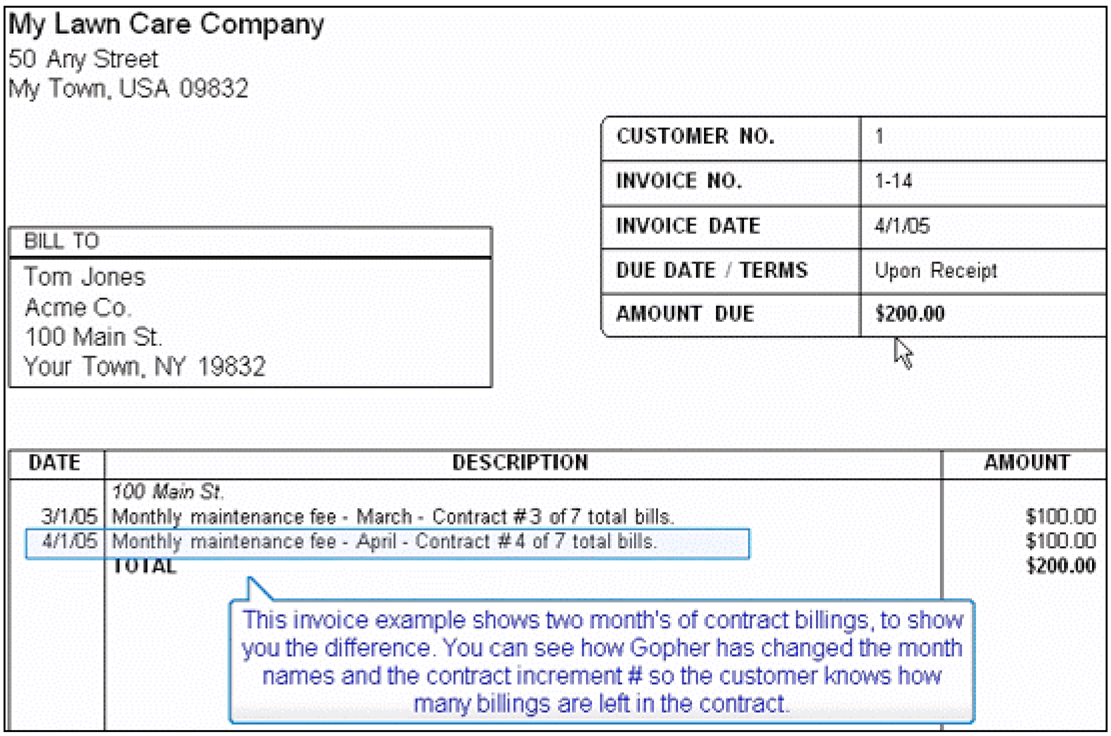


- Step 5. To show you an example of what the line item will look like on this customer's invoice, let's go to the Schedule screen and generate an invoice for this specific customer.



Contract - Contracts Special Fields Example.

- Step 6. Here is a sample invoice showing two months of contracts. This example shows you how Gopher can use the Contract features Special Fields to dynamically change invoice line item text.



My Lawn Care Company
50 Any Street
My Town, USA 09832

CUSTOMER NO.	1
INVOICE NO.	1-14
INVOICE DATE	4/1/05
DUE DATE / TERMS	Upon Receipt
AMOUNT DUE	$200.00

BILL TO
Tom Jones
Acme Co.
100 Main St.
Your Town, NY 19832

DATE	DESCRIPTION	AMOUNT
	100 Main St.	
3/1/05	Monthly maintenance fee - March - Contract #3 of 7 total bills.	$100.00
4/1/05	Monthly maintenance fee - April - Contract #4 of 7 total bills.	$100.00
	TOTAL	$200.00

This invoice example shows two month's of contract billings, to show you the difference. You can see how Gopher has changed the month names and the contract increment # so the customer knows how many billings are left in the contract.

Matrix

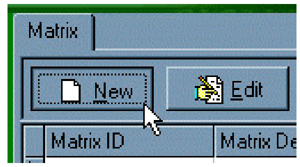
The basic function of the "Matrix" page is to apply a service(s) and or material(s) to a single or group of customers at once. You would use this feature when you don't know what services or materials you will apply until you are on the job site. What jobs might you use the Matrix feature with? Such jobs as spring or fall cleanups or snowplowing.

Frequently Ask Questions for the matrix section.

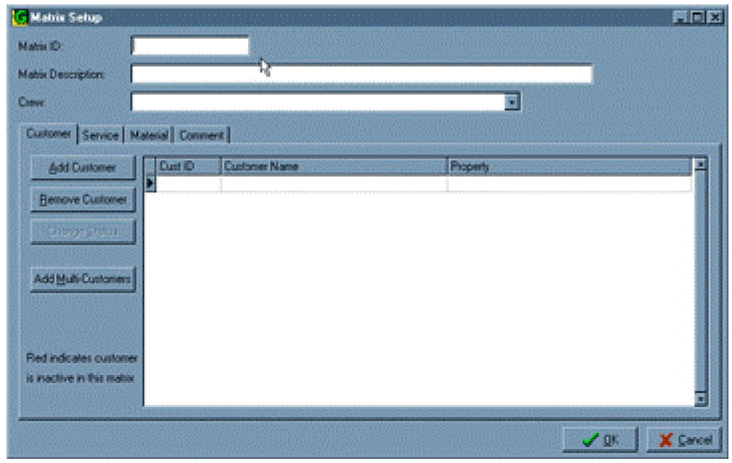
- How to enter a new Matrix. Page - **95**
- How can I use the matrix for snow plowing or leaf cleanup? Page - **97**

Matrix – How to enter a new Matrix.

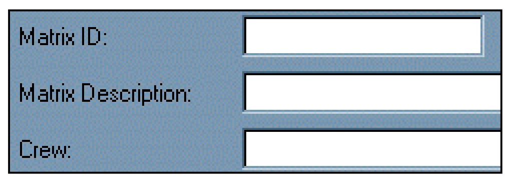
- Make sure you are on the tab "Matrix."
- Click on the "New" button.



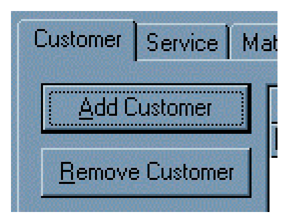
- A "Matrix Setup" window will appear.



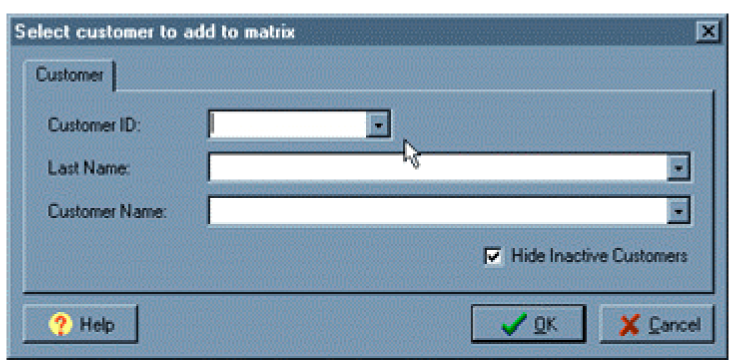
- "Matrix ID" - Enter an ID for this entry.



- "Matrix Description" - Enter a description for this Matrix entry.
- "Crew" - Choose the crew that performed the following services and/or materials.
- Click on the "Customer" tab.

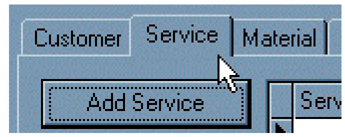


- "Add Customer" button - Use this to add customers to this matrix.

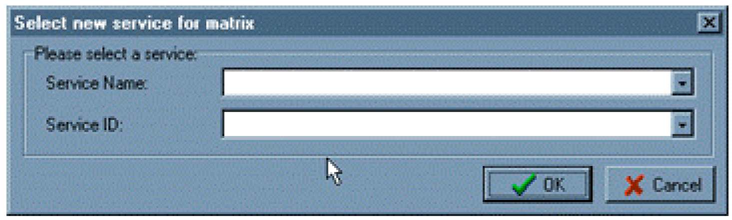


Matrix – How to enter a new Matrix.

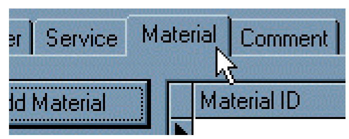
- "Remove Customer" button - Use this to remove the highlighted customer from the list.
- "Change Status" button - Use this button to make this customer active or inactive in this matrix.
- "Add Multi-Customers" - Use this button to add multiple customers at once.
- Click on the "Service" tab.



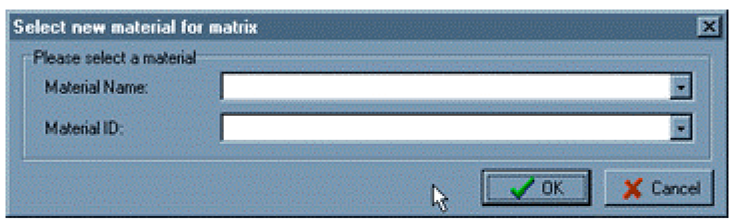
- "Add Service" button - Click on this button to add services to this matrix. Set up your customer specific prices for these services in your service page.



- "Remove Service" button - Click on this button to remove the highlighted service from the service list.
- Click on the "Material" tab.

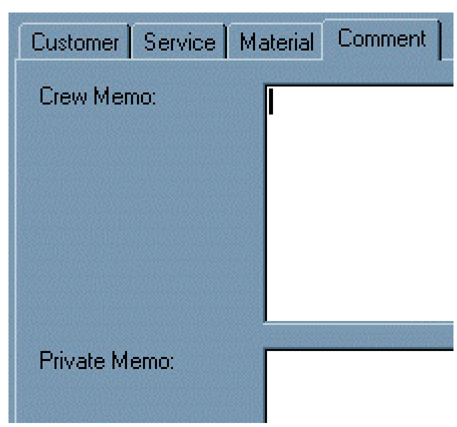


- "Add Material" button - Click on this button to add materials to this matrix. Make sure you have entered your materials in the material page first before you add materials here to your matrix.



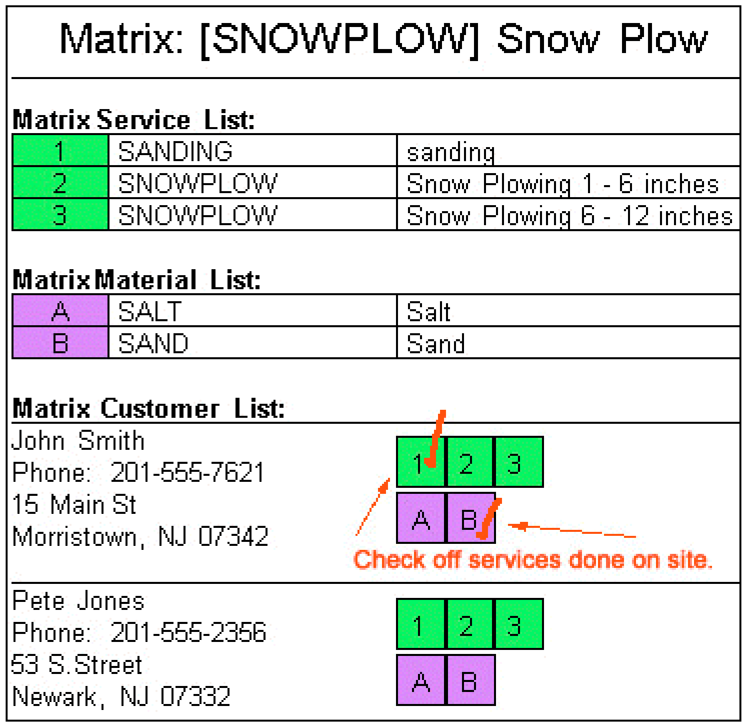
- "Remove Material" button - Click on this button to remove the highlighted material from the matrix.

- Click on the "Comment" tab.
- "Crew Memo" - Enter a memo about this matrix for the crew.
- "Private Memo" - Enter a private memo that is for your use only.
- Click the "OK" button.



Matrix – Snow Plow Example.

- **Question:** How would I use the Matrix for snow plowing?
- **Answer:** You can set up a Matrix that includes the different services and materials you offer during the winter months. Your Matrix may include the following services "snowplowing between 1 - 6 inches", "snowplowing between 6 - 12 inches", and "Sanding."
- Your materials may include "Sand" and "Salt."
- Now since you may not know exactly what services or materials you will use until you get to the job site, you will have your matrix list with you. Click the Print button to print out your Matrix list. Each customer that you have added to your Matrix will have a grid next to their name to allow you to check off which services or materials you applied at the site.


Matrix: [SNOWPLOW] Snow Plow

Matrix Service List:

1	SANDING	sanding
2	SNOWPLOW	Snow Plowing 1 - 6 inches
3	SNOWPLOW	Snow Plowing 6 - 12 inches

Matrix Material List:

A	SALT	Salt
B	SAND	Sand

Matrix Customer List:

John Smith
Phone: 201-555-7621
15 Main St
Morristown, NJ 07342

1 2 3
A B

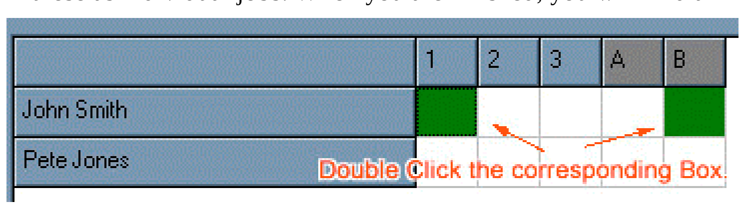
Check off services done on site.

Pete Jones
Phone: 201-555-2356
53 S.Street
Newark, NJ 07332

1 2 3
A B

- At the end of the day, run Gopher and pull up the Matrix screen. Choose the Matrix you want to complete and click the "Complete Matrix" button.

- Double click on the corresponding item in the grid that you checked off on the form and that will quickly enter your services or materials used. This totally eliminates the need to add line items to your invoices later or have to schedule in these as individual jobs. When you are finished, you will find all the completed Matrix jobs in the Schedule page, under the Completed Jobs tab, awaiting invoice generation.



Matrix – Snow Plow Example.

- You may also want to create a "Spring Clean up" Matrix or a "Fall Clean up" Matrix as well. At the top of the Matrix window, you will see one tab: "Matrix". Use the New, Edit, Delete and Complete Matrix buttons to operate your Matrix database. To create a new Matrix item, be sure you are on the "Matrix" page located on the green navigation bar that runs along the left side of the screen. Continue by following the example below.

Expense

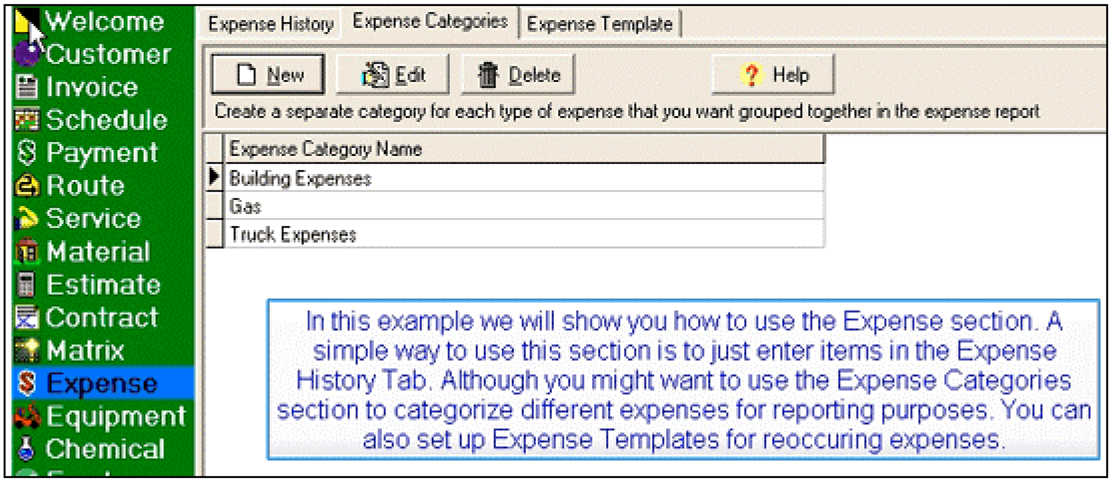
The basic function of the "Expense" page is track your expenses. At the top of the Expenses window, you will see three tabs: "Expense History", "Expense Categories", and "Expense Template." Use the New, Edit, and Delete buttons to operate your expense database.

Frequently Ask Questions for the expense section.

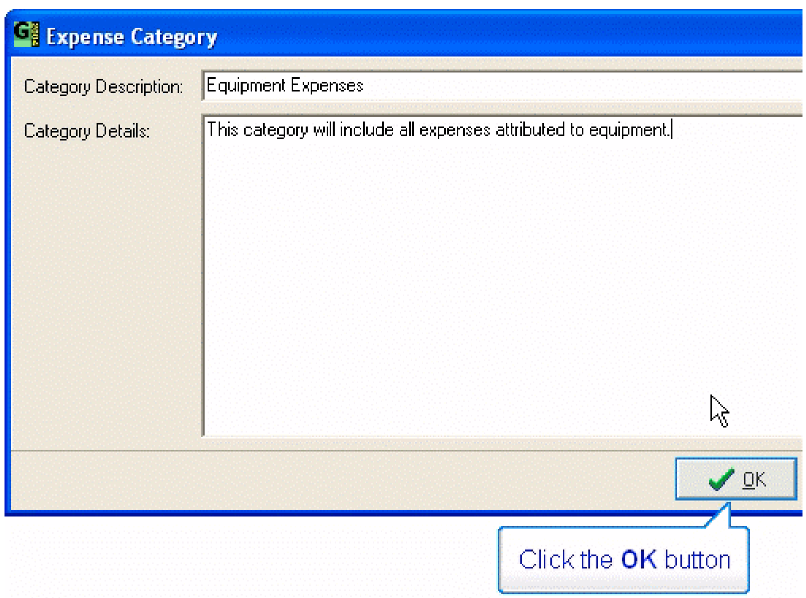
- How to enter a new Expense. Page - **100**
- How can I print out my expense reports? Page - **130**

Expense – How to enter a new Expense.

- This example will show you how to use the Expense section and print out an Expense report.
- Step 1. Make sure you are in the Expense section and click on the Expense Categories tab. Then click the new button.



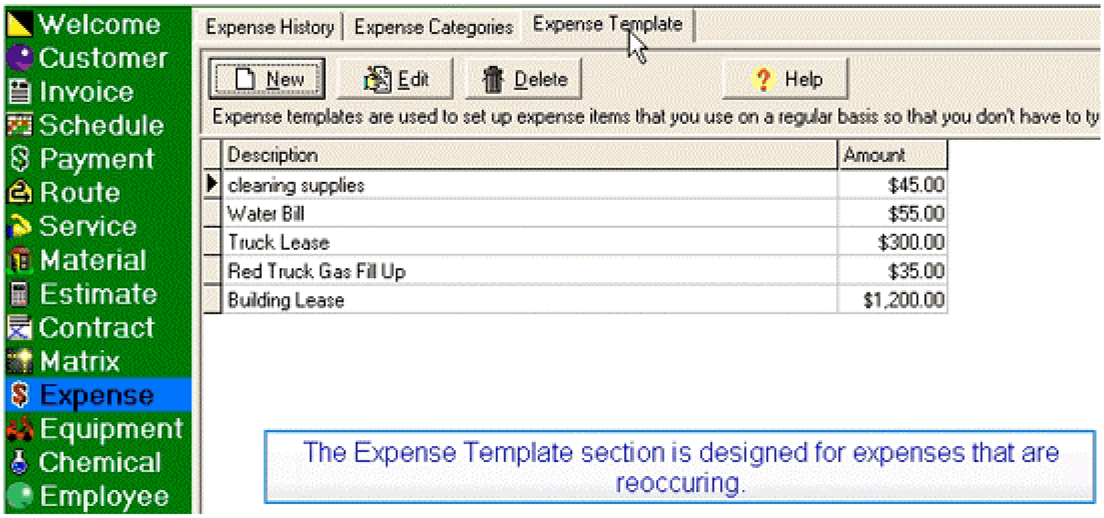
- Step 2. In this example we are creating a new Expense Category that will track our equipment expenses.
- Enter the Category Description and Category Details then click the OK button.



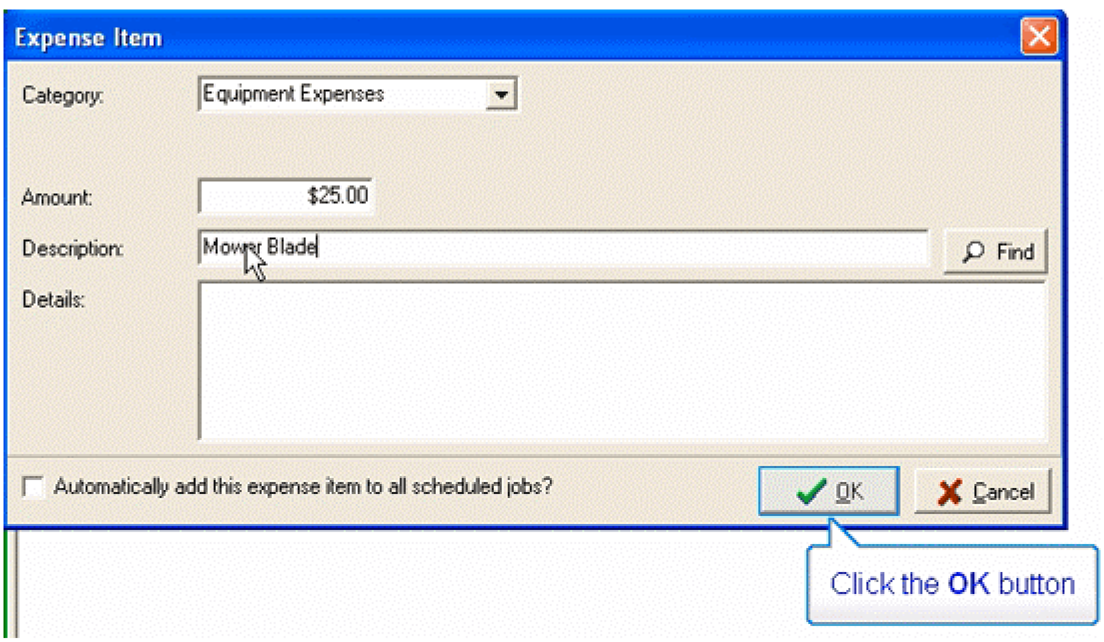
- Step 3. Only use this step for expenses that are reoccurring.

Expense – How to enter a new Expense.

- Click on the Expense Template tab and click the new button.

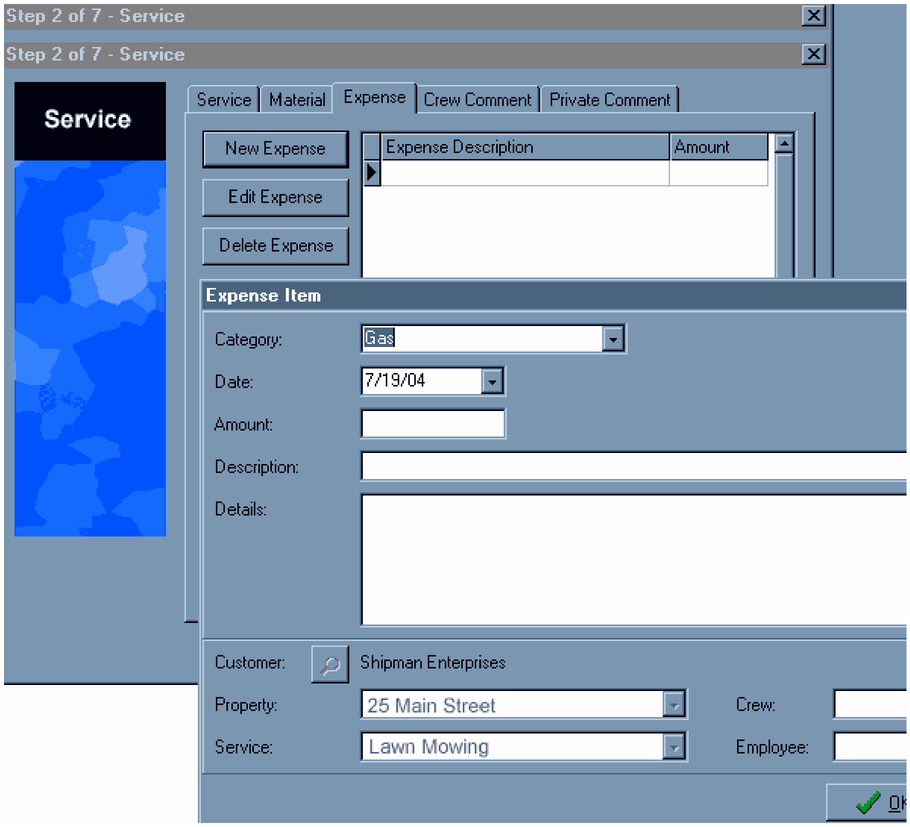


- Step 4. Choose the Expense Category in the drop down box. Enter the amount, Description and Details (if needed). Click OK when completed.

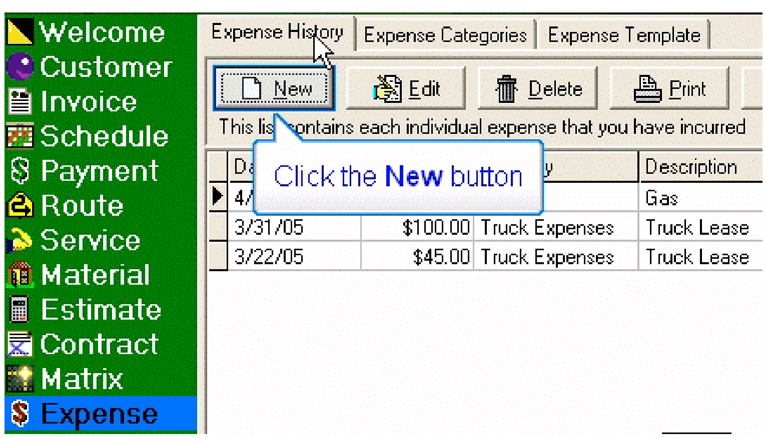


Expense – How to enter a new Expense.

- Or schedule them in the schedule section (p.55).

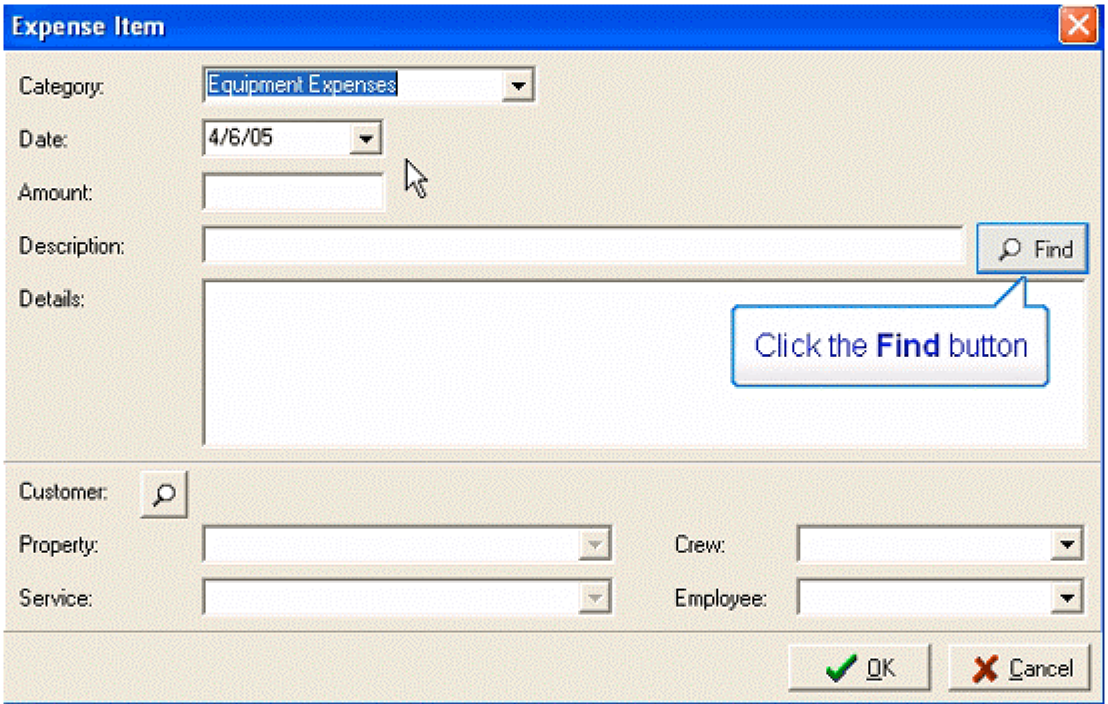


- Step 5. Click on the Expense History tab and click the New button.



Expense – How to enter a new Expense.

Step 6. Choose a category from the Category drop down box. If this expense history item is going to be chosen from an Expense Template, click on the Find button. If it is not going to be using an Expense Template, simply type in the Amount, Description, and Details. Click the OK button when completed.



Equipment

The basic function of the "Equipment" page is to keep track of the your equipment, its usage, and maintenance.

At the top of the Equipment window, you will see five tabs: "Equipment", "Repair", "Maintenance", "Usage", and "Equipment Category." Use the New, Edit, and Delete buttons to operate your Equipment database. To create a new Equipment record, be sure you are on the "Equipment" page located on the green navigation bar that runs along the left side of the screen.

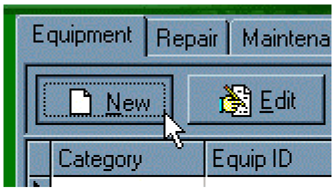
Frequently Ask Questions for the equipment section.

- How to enter a new Equipment record. Page - **105**
- How to track equipment usage with the schedule jobs. Page - **106**

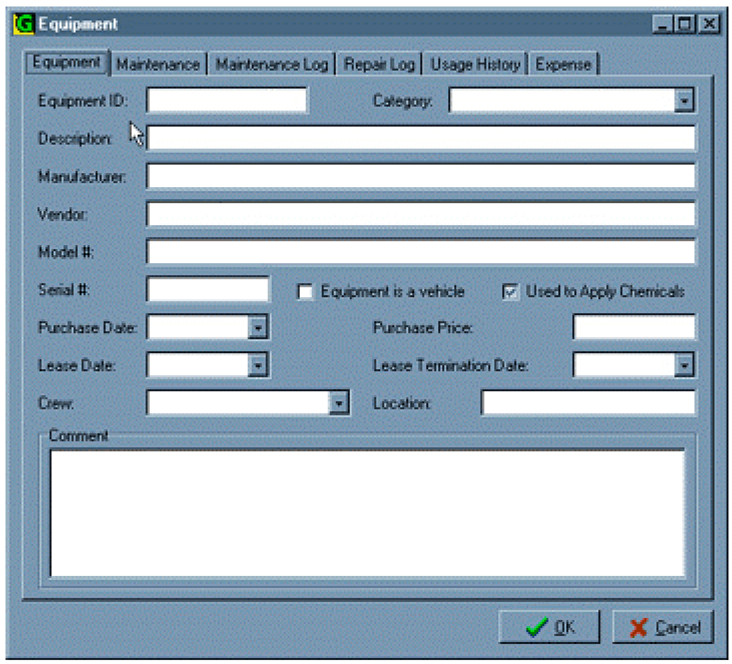
Equipment – How to enter new equipment.

- Make sure you are in the equipment section of Gopher and click on the "Equipment" tab.

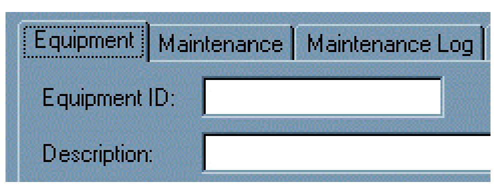
- Click on the "New" button.



- An "Equipment" window will appear. This window has six tabs: "Equipment", "Maintenance", "Maintenance Log", "Repair Log", "Usage History", and "Expense."



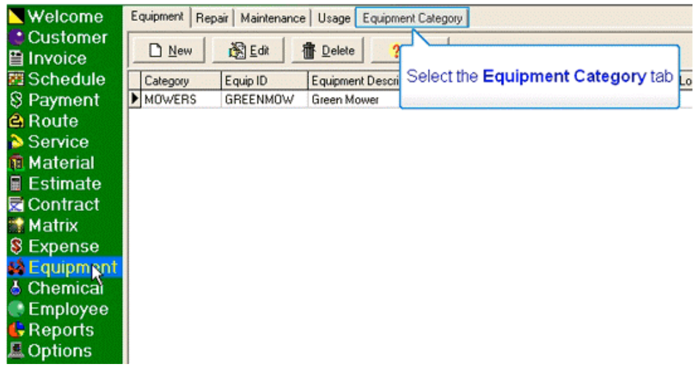
- Click on the "Equipment" tab.



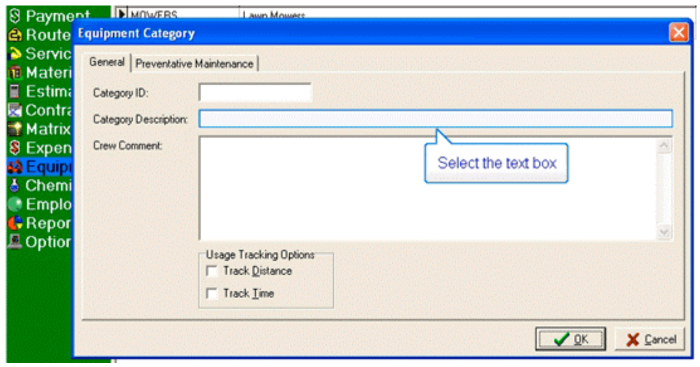
- "Equipment ID" - Enter an ID for this piece of equipment.
- "Description" - Enter a description of the piece of equipment.
- Click the "OK" button.

Equipment – How to track equipment usage with the schedule jobs.

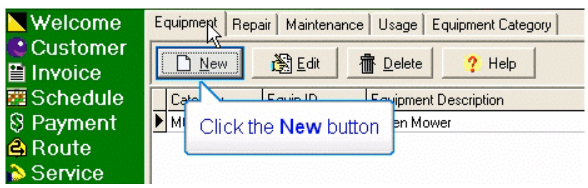
- Step 1. Click on the Equipment page. Choose the Equipment Category tab.



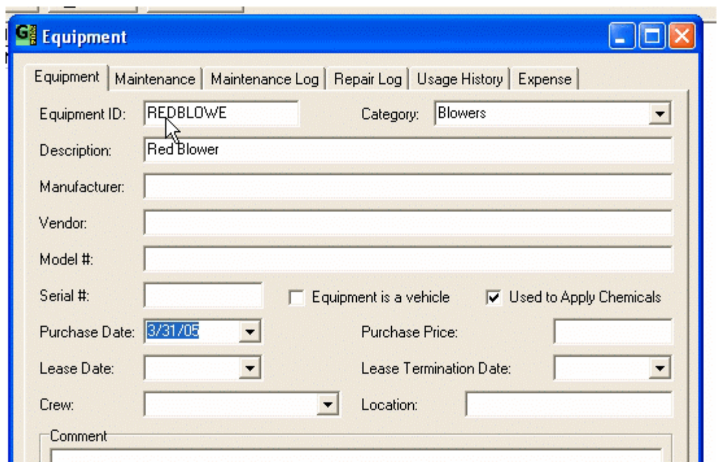
- Step 2. Click the New button.
- Step 3. Enter a new Category Description. Then click OK. In this example we are creating 'Blowers.'



- Step 4. Click on the Equipment tab and click the New button.

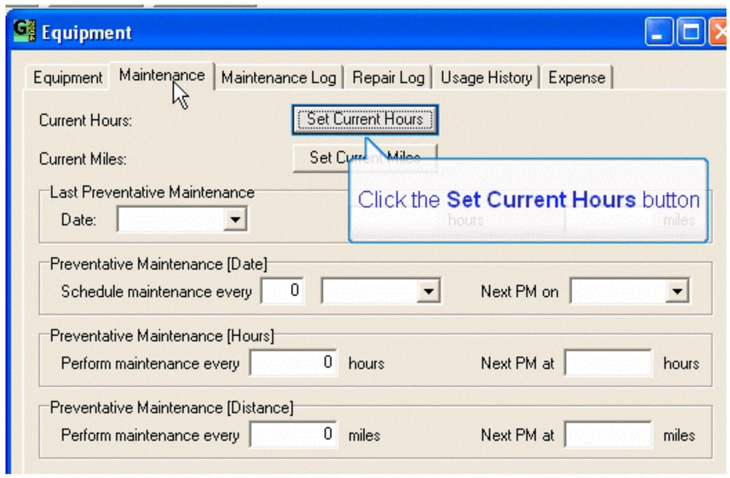


- Step 5. Enter the new Equipment Description. Choose the Category from the drop down list. Fill out other information as desired. When complete, click the Maintenance tab.

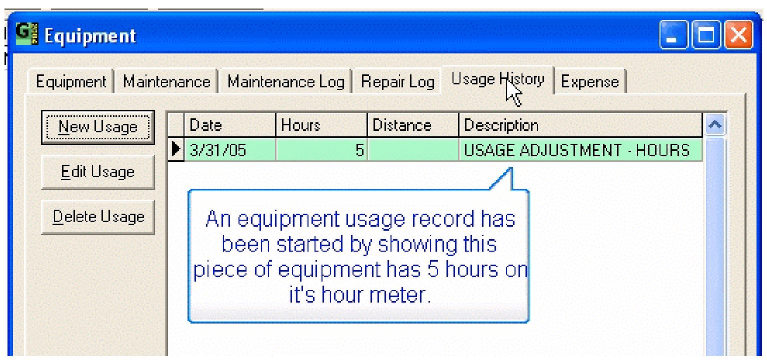


Equipment – How to track equipment usage with the schedule jobs.

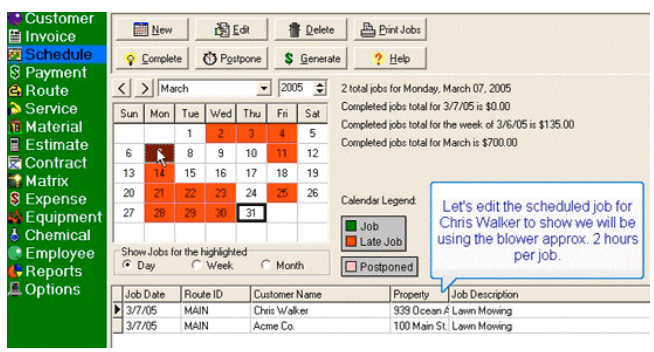
- Step 6. Click on the Set Current Hours and enter the hour meter reading of the piece of equipment. In this example we are entering 5 hours.



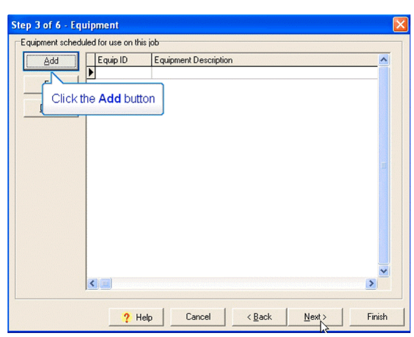
- Step 7. Click on the Usage History tab and you will see your 5 hour initial meter reading item. When you are finished click the OK button at the bottom right of this window.



- Step 8. Next let's go to the Schedule page and choose to edit Chris Walker's scheduled job. We do this by highlighting the job below the calendar and then clicking on the Edit button.

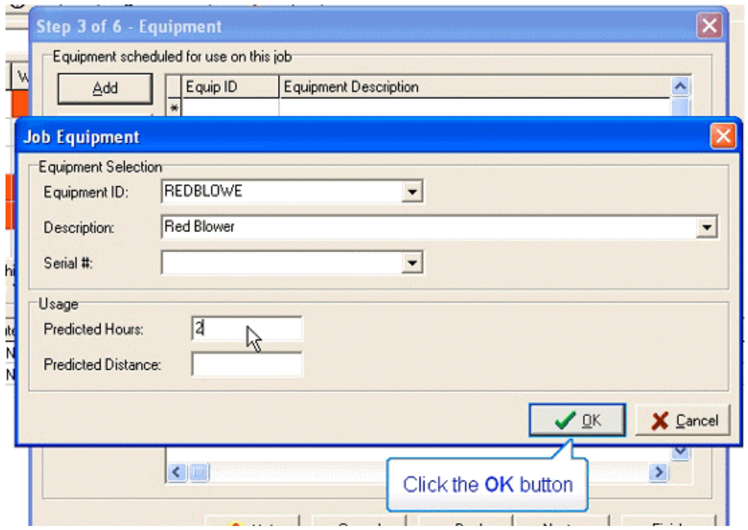


- Step 9. Click the Next button until you come to the Equipment step of the schedule process. Then click the Add button.



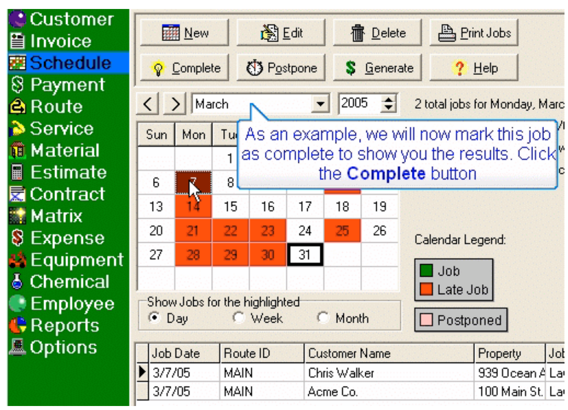
Equipment – How to track equipment usage with the schedule jobs.

- Step 10. Choose the piece of equipment. In this example we are choosing the Red Blower. Set the Predicted Hours this blower will be used for. (You can edit this time later) Click OK when you are finished.

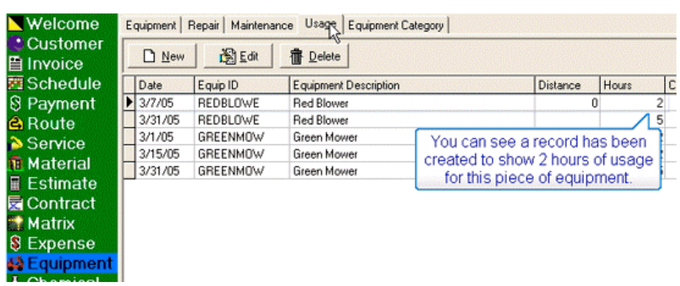


- Step 11. Click the Finish button when you are done.

- Step 12. Just as an example we will now mark the job as completed to show you the results.



- Step 13. Let's go now to the Equipment page and click on the Usage tab. You will see a line item showing 2 hours of usage for that piece of equipment due to it's use in the scheduled job.



Chemical

The basic function of the "Chemical" page is to keep track of the chemicals you apply.
At the top of the Chemical window, you will see four tabs: "Chemical List", "Usage History", "Chemical Units", and "Reason." Use the New, Edit, and Delete buttons to operate your Chemical database. To create a new chemical record, be sure you are on the "Chemical" page located on the green navigation bar that runs along the left side of the screen. Continue by following the example below. You have the option to show chemical application information on your invoices, your state may or may not require this. Go to the Options section on the left side of your screen on the green bar, then click the Billing button and you will see a "display chemical application info on invoices."

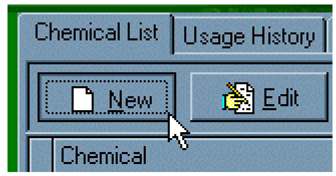
Frequently Ask Questions for the chemical section.

- How to enter a new Chemical record. Page - **110**
- Can I have my invoices show information on the chemicals appied? Page - **54**
- How can I print out a report on the chemicals I apply for state audits? Page - **128**
- How can I enter weather conditions after applying chemicals? Page - **111**

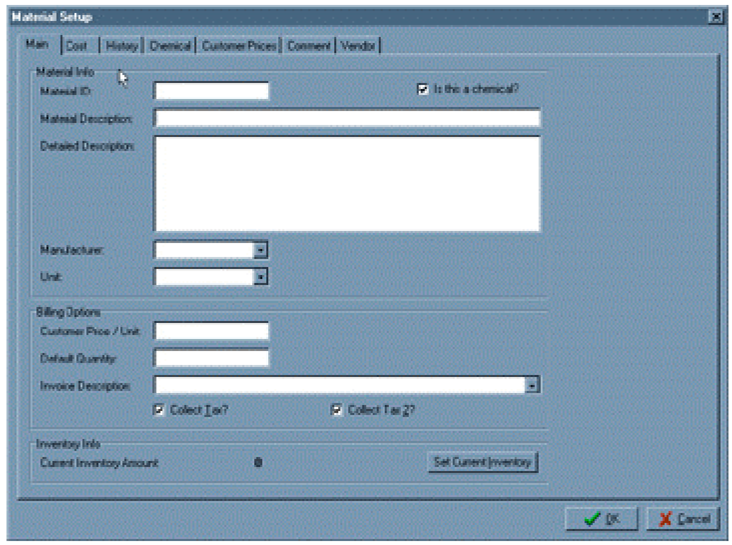
Chemical – How to enter a new Chemical record.

- Make sure you are on the "Chemical List" tab.

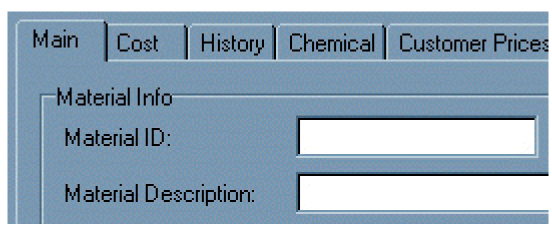
- Click on the "New" button.



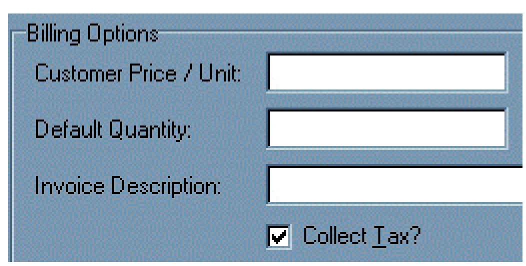
- Click on the "Main" tab.



- A "Material Setup" window will appear. This window has seven tabs: "Main", "Cost", "History", "Chemical", "Customer Prices", "Comment", and "Vendor."



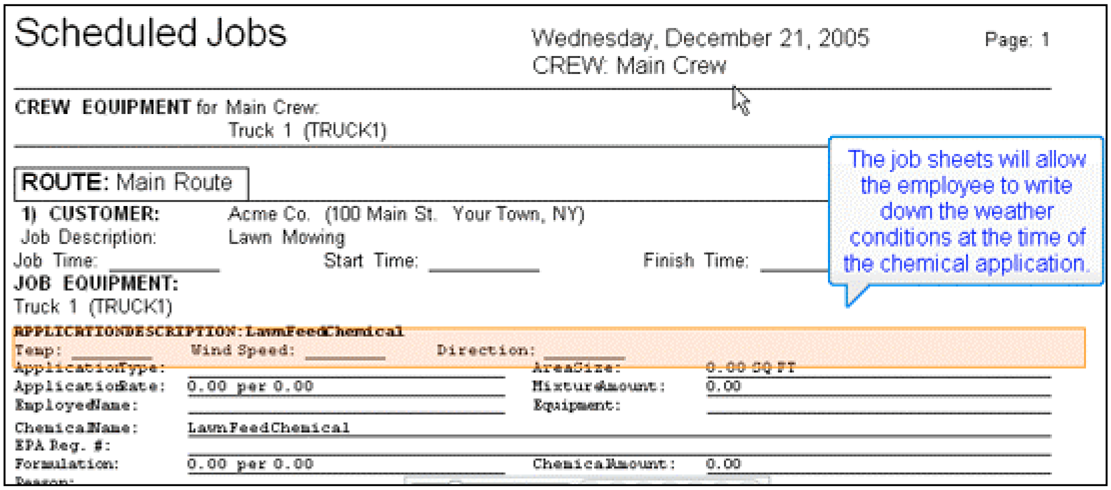
- "Material ID" - Enter a material ID.
- "Material Description" - Enter a description of this material.
- "Customer Price / Unit" - Enter the price of the material per unit.



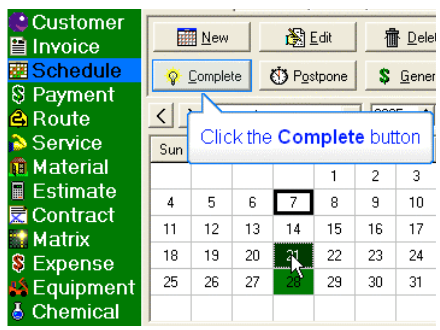
- "Default Quantity" - Enter the default quantity of this material.
- "Collect Tax" - Check this box if sales tax is to be applied to this material."
- Click the "OK" button.

Chemical – How can I enter weather conditions after applying chemicals?

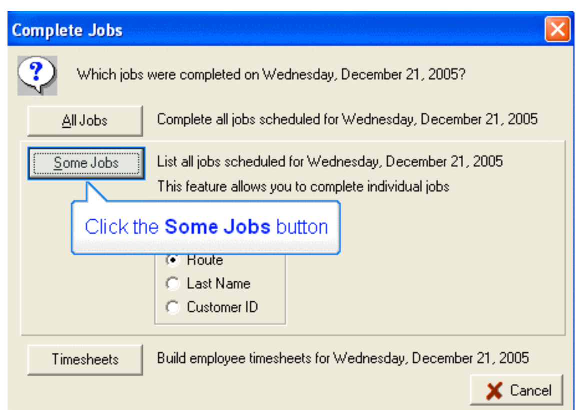
- Print out your daily job sheets. If you have scheduled in a chemical application in your job it should appear similar to the example below. The employee can then write down weather conditions at the time of the chemical application.



- At the end of the day mark your jobs complete as you normally would.

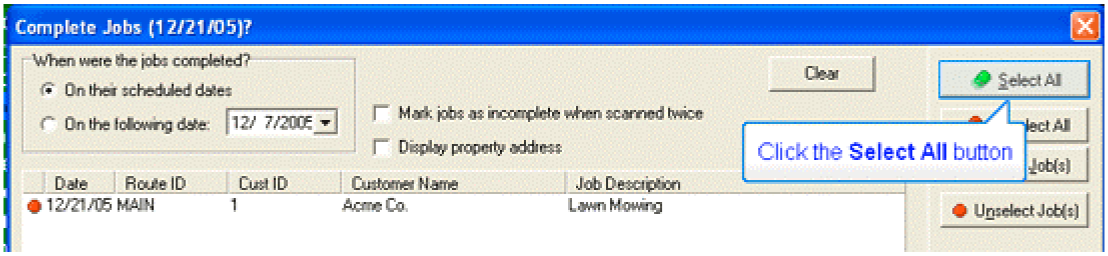


- Choose the some jobs button.

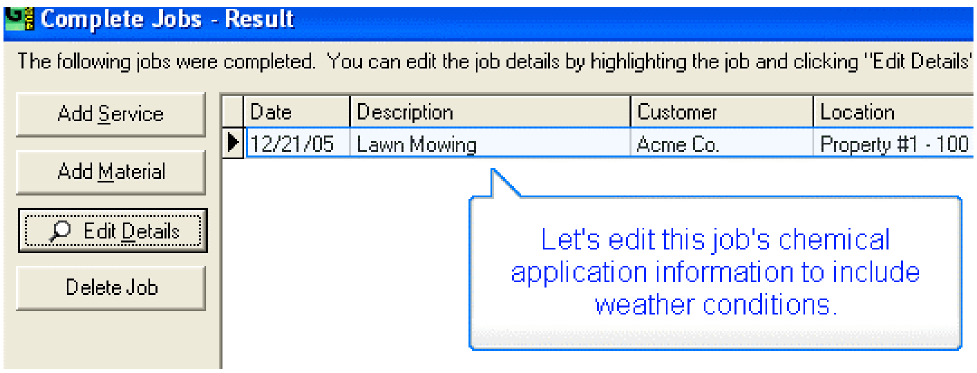


Chemical – How can I enter weather conditions after applying chemicals?

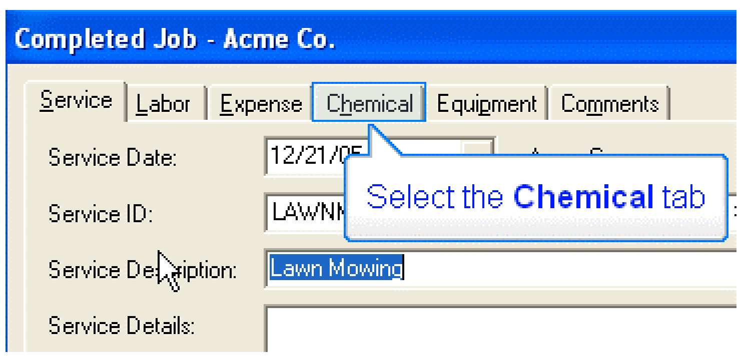
- Choose the select all button. Then click the finish button at the bottom right.



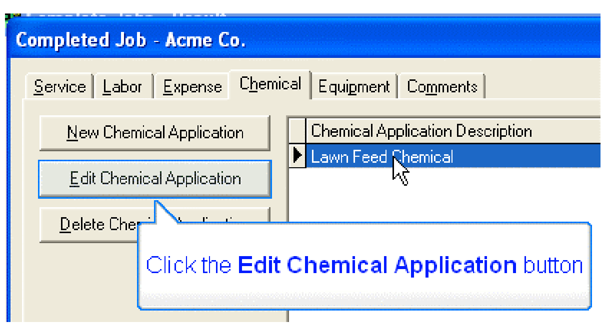
- Let's now highlight this specific job and click the edit details button.



- Click on the chemical tab.

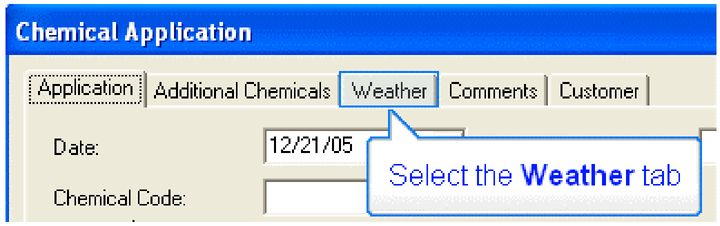


- Highlight the chemical application description item and click the chemical application button.

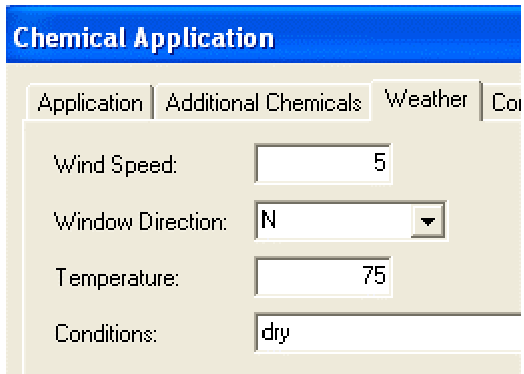


Chemical – How can I enter weather conditions after applying chemicals?

- Select the weather tab.



- Enter the weather information as needed and click the ok button.



- This information will now be available for you to be printed out on your invoices or chemical history reports.

Employee

The basic function of the "Employee" page is to keep track of your employees. At the top of the Employee window, you will see three tabs: "Employee List", "Crew List", and "Timesheets." Use the New, Edit, and Delete buttons to operate your Employee database. At the bottom of the Employee window you will see a "Sort Employee List By" drop down box to sort your Employee list.

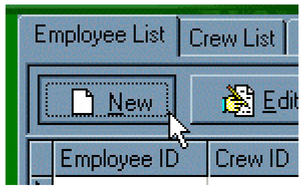
Frequently Ask Questions for the employee section.

- How to enter a new Employee record. Page - **115**
- How to set up work schedules and build timesheets. Page - **116**

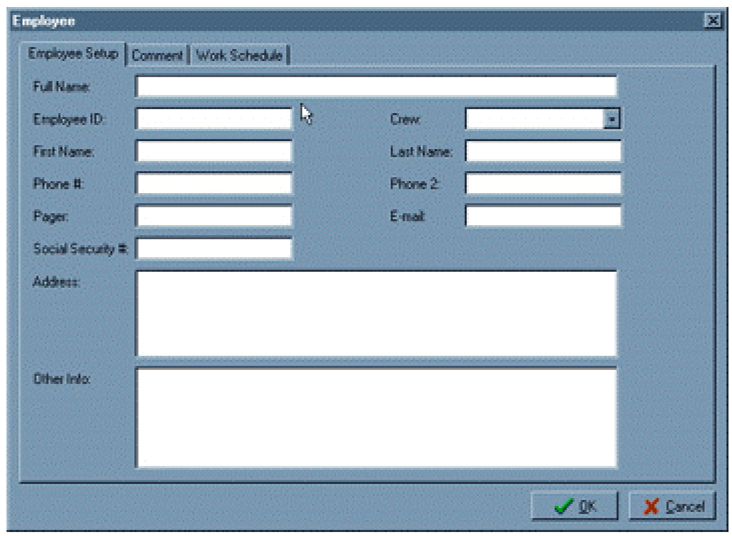
Employee – How to enter a new Employee record.

- Make sure you are on the "Employee List" tab.

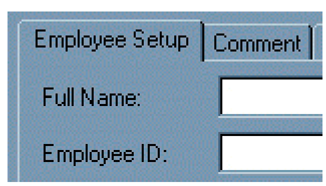
- Click on the "New" button.



- An "Employee" window will appear. This window has three tabs: "Employee Setup", "Comment", and "Work Schedule."



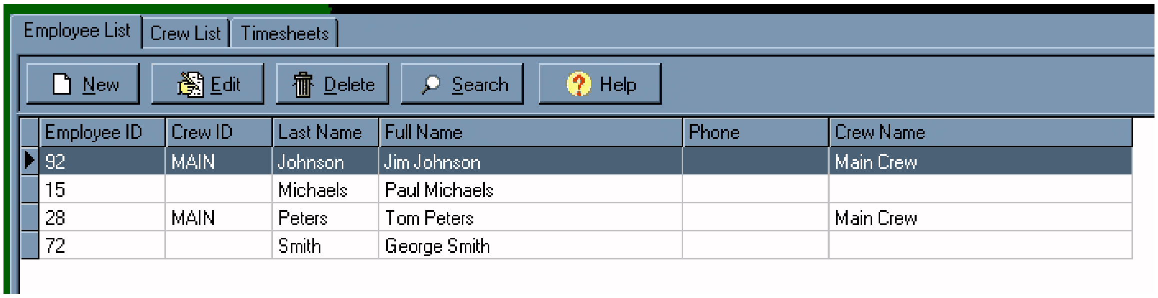
- Click on the "Employee Setup" tab.
- Enter the employee's personal information.



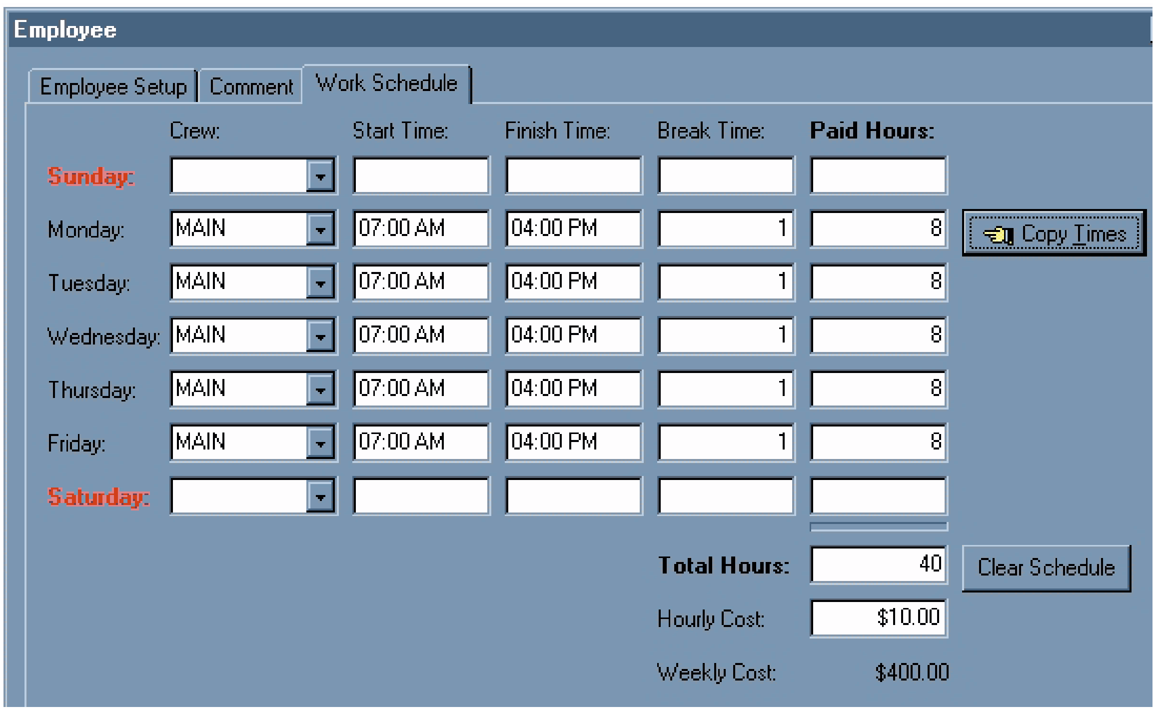
- Click the "OK" button.

Employee – How to set up work schedules and build timesheets.

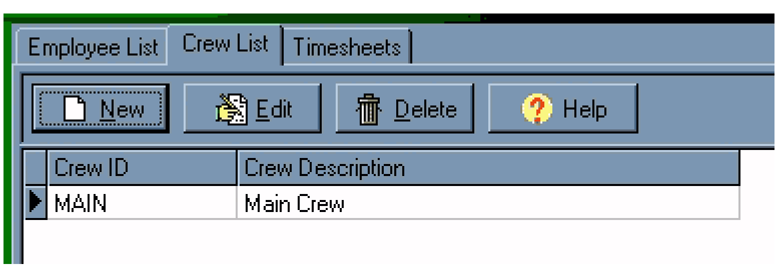
- Enter your employee information here.



- Click on new or edit a current employee to set up each employee's work schedule.

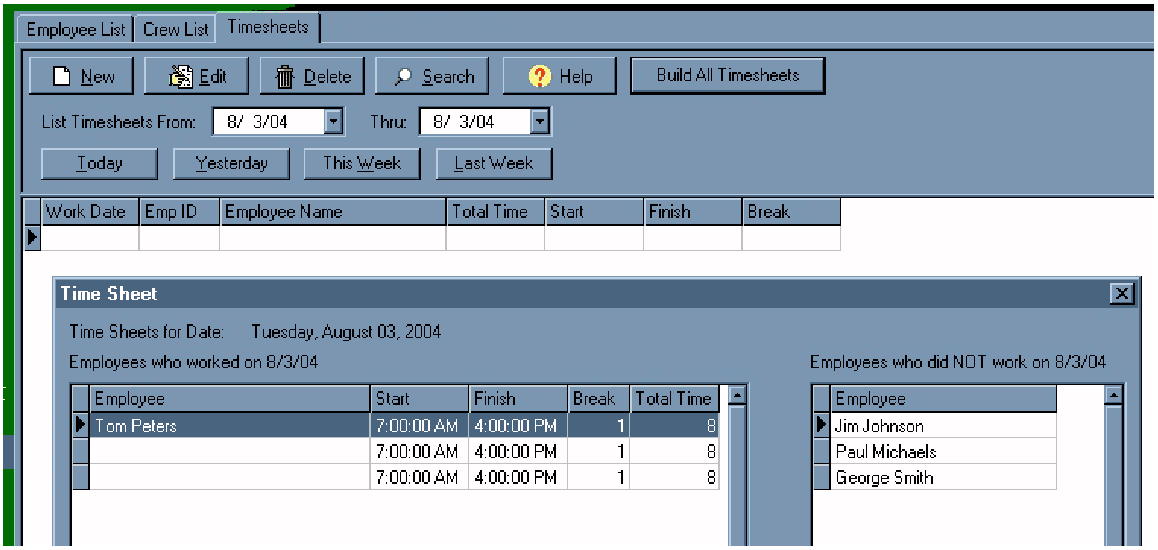


Choose the crew the employee is on.



Employee – How to set up work schedules and build timesheets.

- Build time sheets as needed to view the employees hours.



Reports

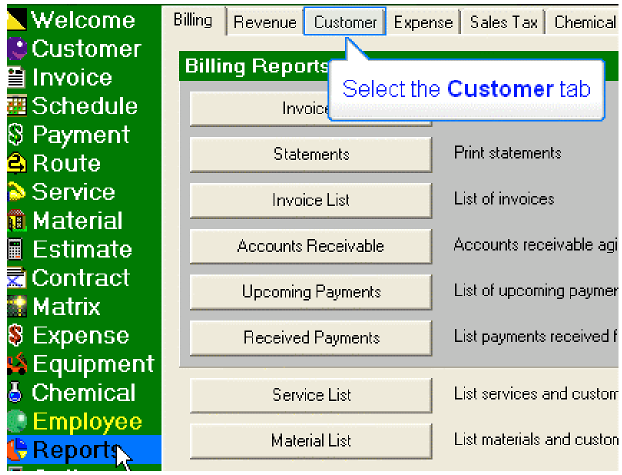
The basic function of the "Reports" page is to offer you a variety of reports you can print out.

Frequently Ask Questions for the reports section.

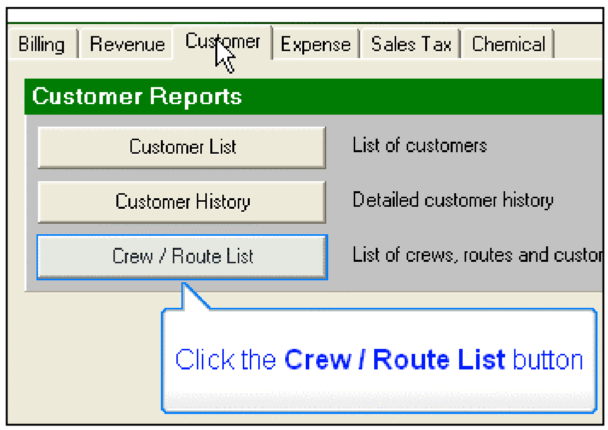
- How to print out (multiple) invoices. Page - **44**
- What's the difference between invoices and statements? Page - **120**
- How to print a customer list with the customer address? Page - **121**
- How to find your Total Accounts Receivable? Page - **122**
- What is the upcoming payments report for? Page - **123**
- How can I create a statement/invoice/etc report in a pdf file? Page - **124**
- Why would I want to create a pdf report? You could do this to email the file to a customer.
- How can I print a sales tax summary report? Page - **126**
- How can I print a route report? Page - **119**
- How can I print a chemical history report? Page - **128**
- How to print a Service Revenue Report? Page - **129**
- How can I print out an Expense Report? Page - **130**
- How can I print mailing labels. Page - **132**

Reports – How to print out a report of routes and the customers in each route.

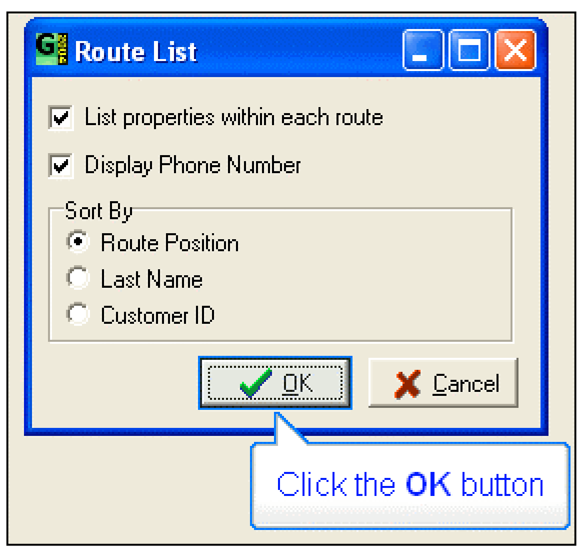
- To print a report of your routes and the customers within them, click on the reports section of Gopher.
- Click on the Customer tab at top.



- Then click on the Crew / Route List button.



- Choose the specific options you want to include and click OK.



Reports – What's the difference between invoices and statements?

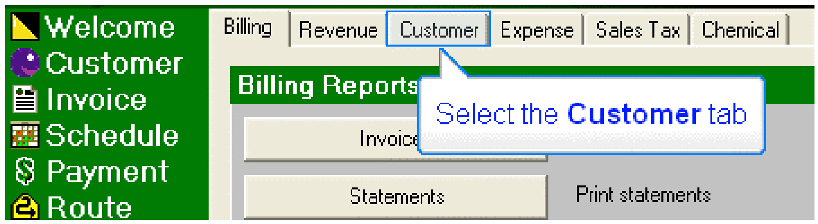
Question: What's the difference between invoices and statements?

Answer: You might want to use invoices to send out at the end of the month. Then if a customer calls up and has a dispute over an invoice or a balance or something, you can print out a statement for the date range in question and send them that.

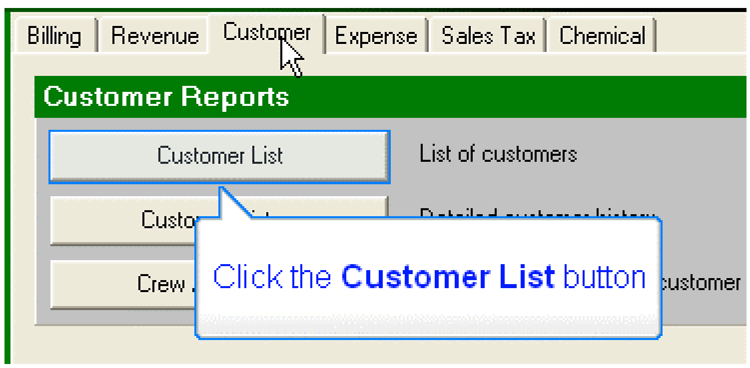
Reports – How to print a customer list with the customer address?

- To print a list of customers with their addresses, choose the report section on the left side of the screen.

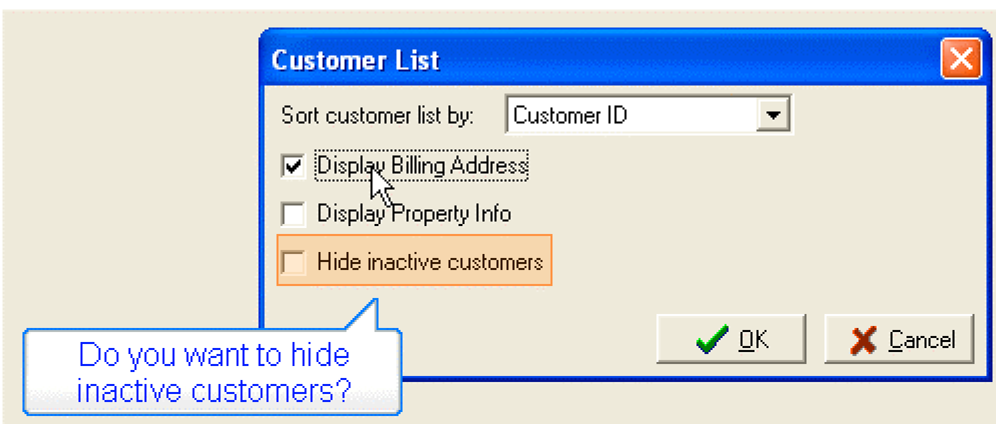
- Then choose the customer tab at the top.



- Click on the customer list button.

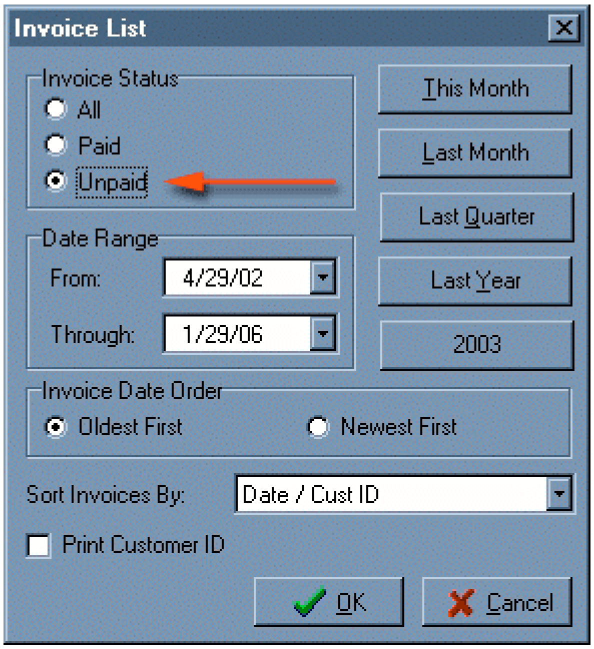


- Next choose the options you would like. Do you want to see the customer address? Show property information? Hide inactive customers?



Reports – How to find your Total Accounts Receivable?

- **Question:** How can you find the total money owed to you by your customers?
- **Answer:** Create an Invoice List Report.
- Make sure you are in the Report section of Gopher then click on the billing tab.
- Click on the Invoice List button.
- Choose only the unpaid invoices and an appropriate date range.



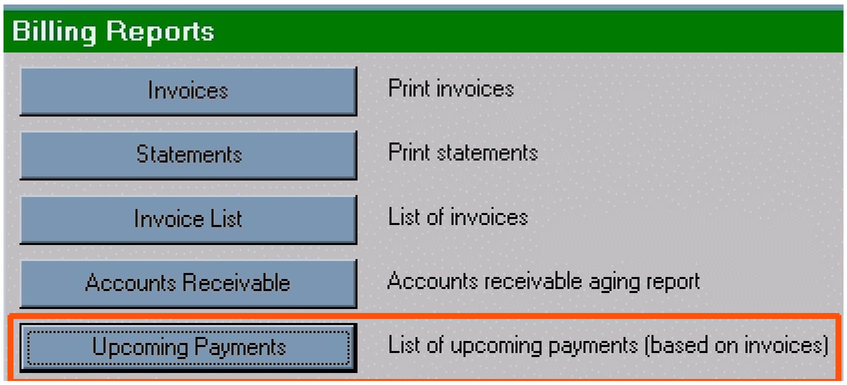
Reports – What is the upcoming payments report for?

- **Question:** What is the upcoming payments report for?

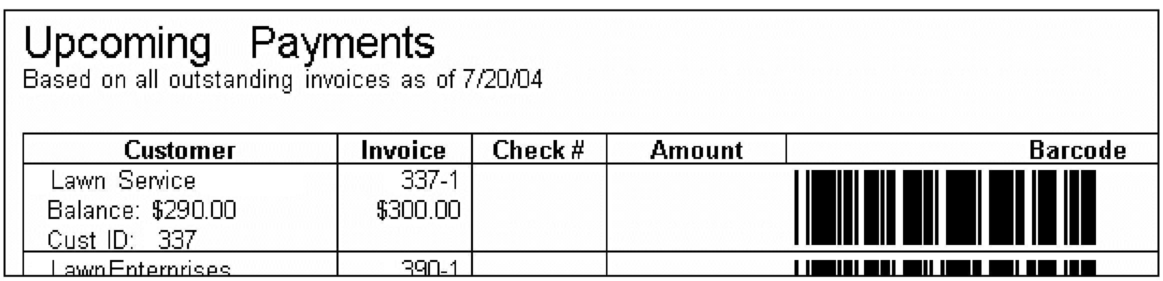
- **Answer:** If you use the barcode scanner to scan in payments and a customer doesn't return the payment stub from the invoice where the barcode is located, you can instead use this report to scan the payment.

- Make sure you are on the reports section.

- Click on the Billing tab and then click on the Upcoming Payments button.



- Here is an example of what the report looks like.



Upcoming Payments
Based on all outstanding invoices as of 7/20/04

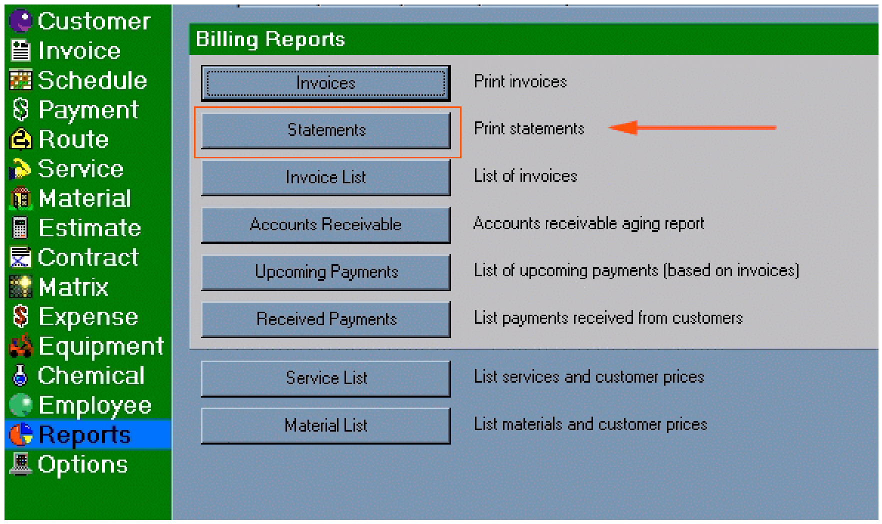
Customer	Invoice	Check #	Amount	Barcode
Lawn Service Balance: $290.00 Cust ID: 337	337-1 $300.00			
LawnEnterprises	390-1			

Reports – How can I create a statement/invoice/etc report in a pdf file?

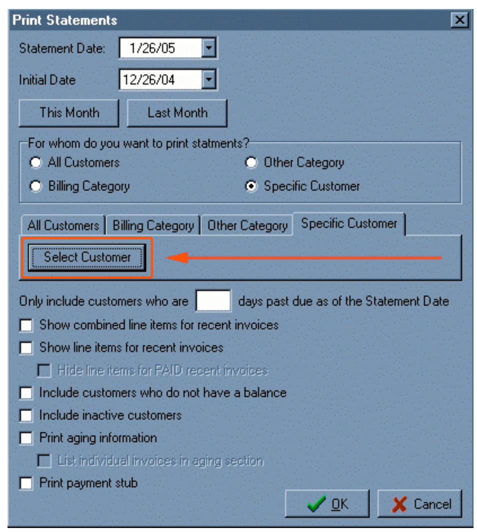
- **Question:** When would you use this feature?

- **Answer:** Say for instance when a customer wants a statement emailed to them. Simply follow these steps and you can create a statement in a pdf format. Then email your customer and attach the statement.pdf file.

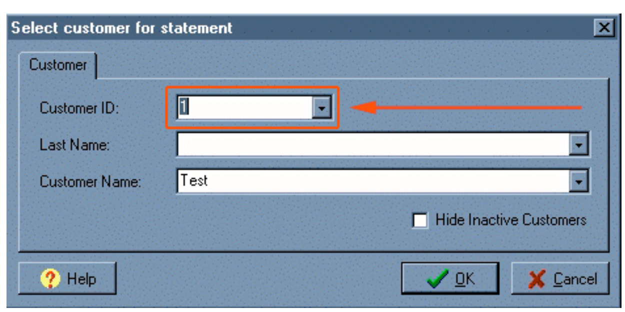
- Step 1. Go to the Reports section, Billing tab and click on the Statement button.



- Step 2. Choose Select Customer.

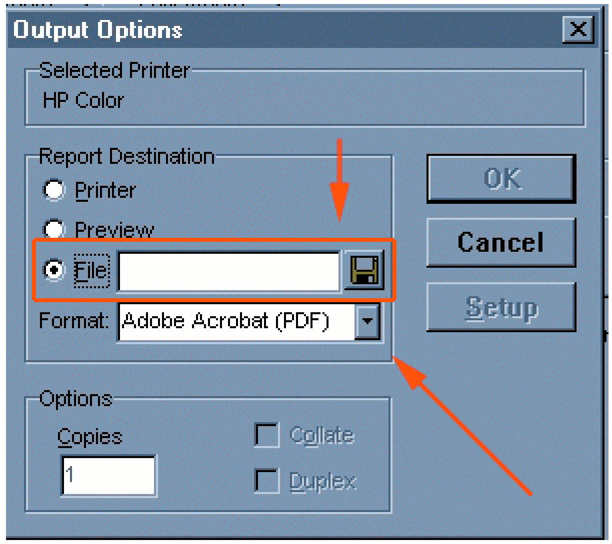


- Step 3. Use one of the three drop down boxes to choose the specific customer.

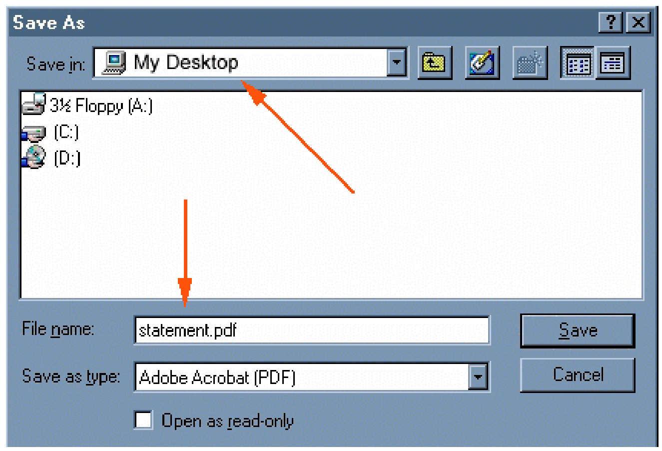


Reports – How can I create a statement/invoice/etc report in a pdf file?

- Step 4. Choose the Format to be Adobe Acrobat (PDF). Then click the disk button next to File.



- Step 5. Choose where you want to save the file. In this example we chose the Desktop and named the file statement.pdf. Then click the Save button.

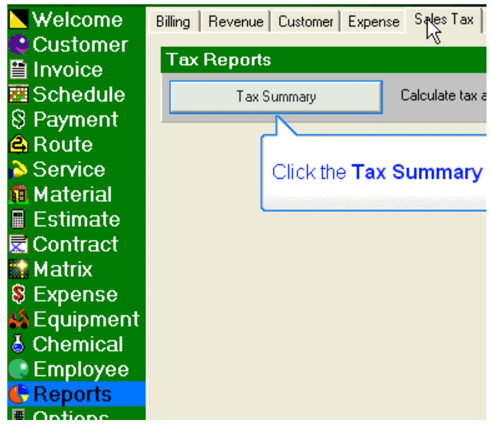


- Step 6. After creating your report, you will see the new statement.pdf icon appear on your desktop.

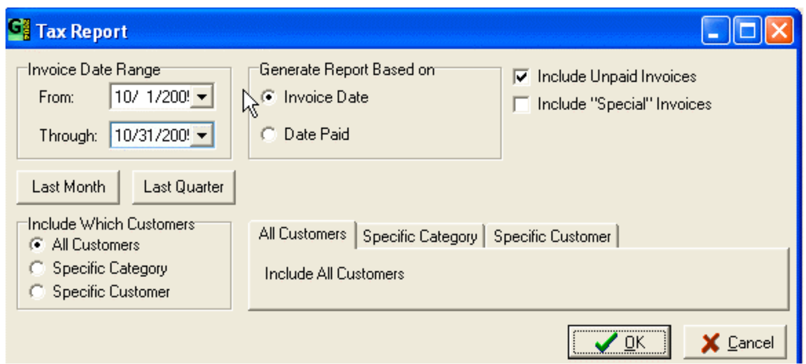
Reports – How can I print a sales tax summary report?

- To print a a report of your tax summary, click on the reports section of Gopher.

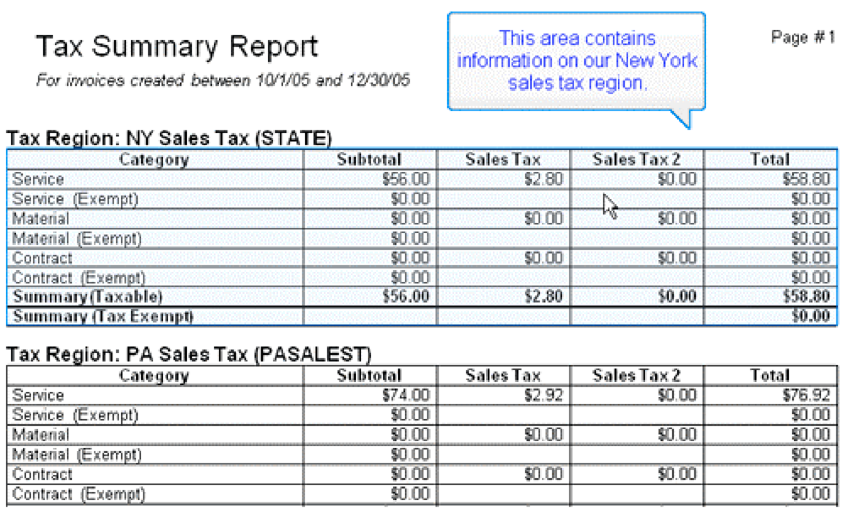
- Step 1: Make sure you are on the reports section. Then click on the Sales Tax tab at top. Then click the Tax Summary button.



- Step 2: Choose the invoice date range and the customers to include in the report. Then click ok.



- Step 3: Here is a sample sales tax report. You can see the different sales tax regions. N.Y. state is highlighted in this example.



Tax Summary Report

For invoices created between 10/1/05 and 12/30/05

Page # 1

Tax Region: NY Sales Tax (STATE)

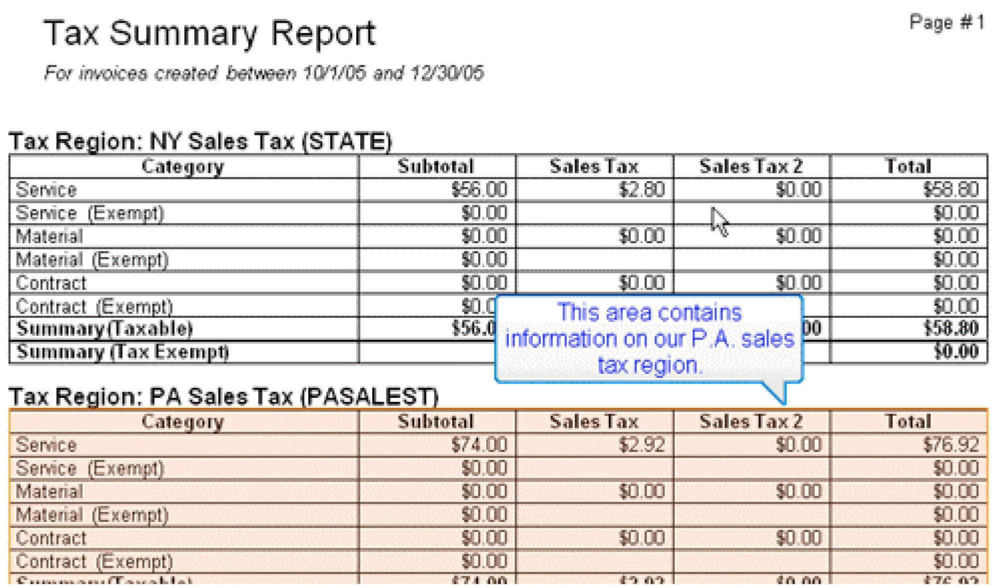
Category	Subtotal	Sales Tax	Sales Tax 2	Total
Service	$56.00	$2.80	$0.00	$58.80
Service (Exempt)	$0.00			$0.00
Material	$0.00	$0.00	$0.00	$0.00
Material (Exempt)	$0.00			$0.00
Contract	$0.00	$0.00	$0.00	$0.00
Contract (Exempt)	$0.00			$0.00
Summary (Taxable)	**$56.00**	**$2.80**	**$0.00**	**$58.80**
Summary (Tax Exempt)				**$0.00**

Tax Region: PA Sales Tax (PASALEST)

Category	Subtotal	Sales Tax	Sales Tax 2	Total
Service	$74.00	$2.92	$0.00	$76.92
Service (Exempt)	$0.00			$0.00
Material	$0.00	$0.00	$0.00	$0.00
Material (Exempt)	$0.00			$0.00
Contract	$0.00	$0.00	$0.00	$0.00
Contract (Exempt)	$0.00			$0.00

Reports – How can I print a sales tax summary report?

- The P.A. state region is highlighted in orange for our example.



Tax Summary Report

Page # 1

For invoices created between 10/1/05 and 12/30/05

Tax Region: NY Sales Tax (STATE)

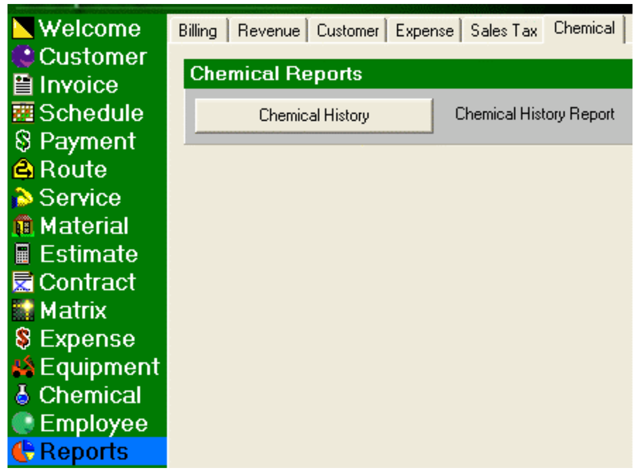
Category	Subtotal	Sales Tax	Sales Tax 2	Total
Service	$56.00	$2.80	$0.00	$58.80
Service (Exempt)	$0.00			$0.00
Material	$0.00	$0.00	$0.00	$0.00
Material (Exempt)	$0.00			$0.00
Contract	$0.00	$0.00	$0.00	$0.00
Contract (Exempt)	$0.0			$0.00
Summary(Taxable)	**$56.0**		**00**	**$58.80**
Summary (Tax Exempt)				**$0.00**

Tax Region: PA Sales Tax (PASALEST)

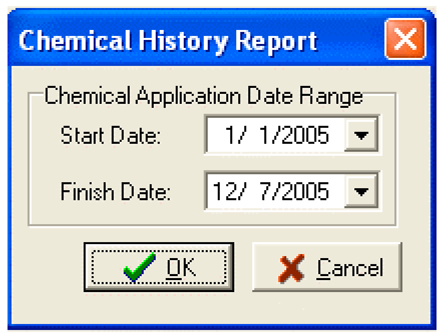
Category	Subtotal	Sales Tax	Sales Tax 2	Total
Service	$74.00	$2.92	$0.00	$76.92
Service (Exempt)	$0.00			$0.00
Material	$0.00	$0.00	$0.00	$0.00
Material (Exempt)	$0.00			$0.00
Contract	$0.00	$0.00	$0.00	$0.00
Contract (Exempt)	$0.00			$0.00
Summary(Taxable)	$74.00	$2.92	$0.00	$76.92

Reports – How can I print a chemical history report?

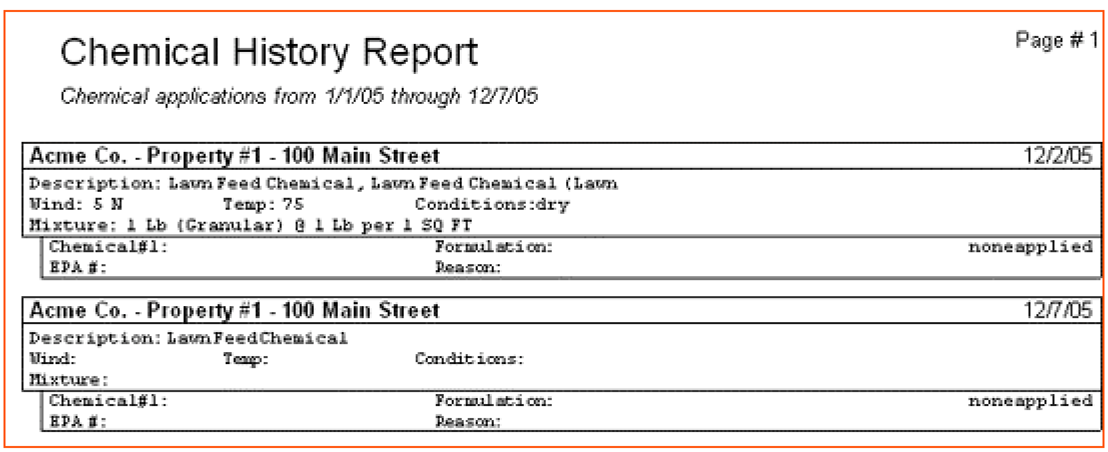
- To print a a report of your chemical history, click on the reports section of Gopher.
- Step 1: Make sure you are on the reports section. Then click on the Chemical tab at top. Then click the Chemical History button.



- Step 2. Choose the date range for the report.



- Step 3. Here is a sample chemical history report.



Chemical History Report

Page # 1

Chemical applications from 1/1/05 through 12/7/05

Acme Co. - Property #1 - 100 Main Street 12/2/05

Description: Lawn Feed Chemical, Lawn Feed Chemical (Lawn
Wind: 5 N Temp: 75 Conditions:dry
Mixture: 1 Lb (Granular) @ 1 Lb per 1 SQ FT
Chemical#1: Formulation: noneapplied
EPA #: Reason:

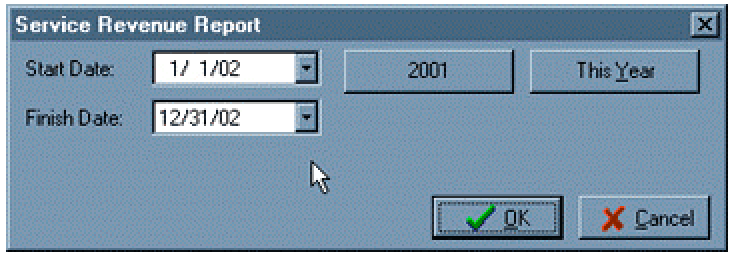
Acme Co. - Property #1 - 100 Main Street 12/7/05

Description: LawnFeedChemical
Wind: Temp: Conditions:
Mixture:
Chemical#1: Formulation: noneapplied
EPA #: Reason:

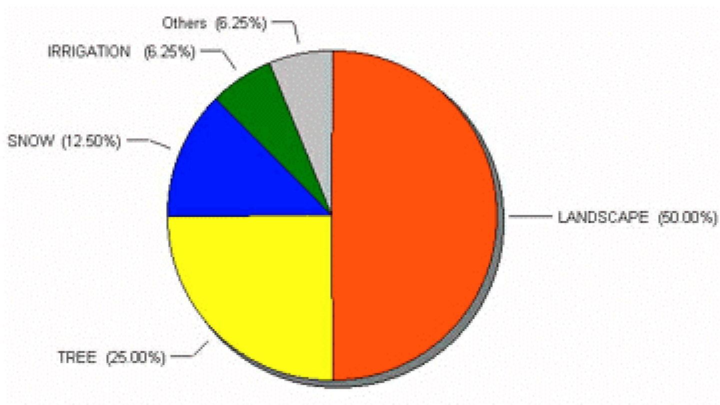
Reports – How to print a Service Revenue Report?

- Make sure you are on the Report section

Then click on the Revenue tab and then the "Service Revenue" button. A "Service Revenue Report" window will appear.

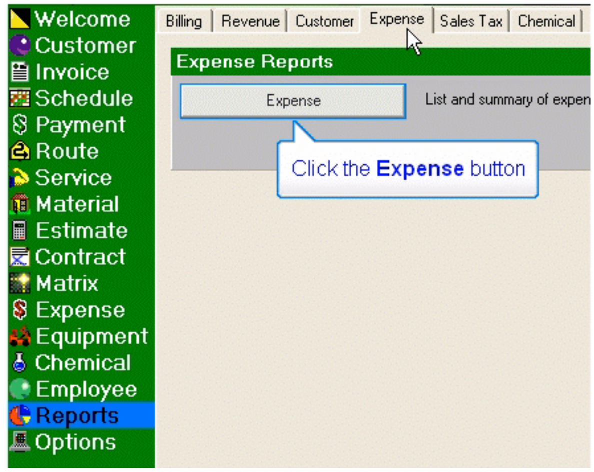


- " Start Date & Finish Date" - Choose the date range for your report.

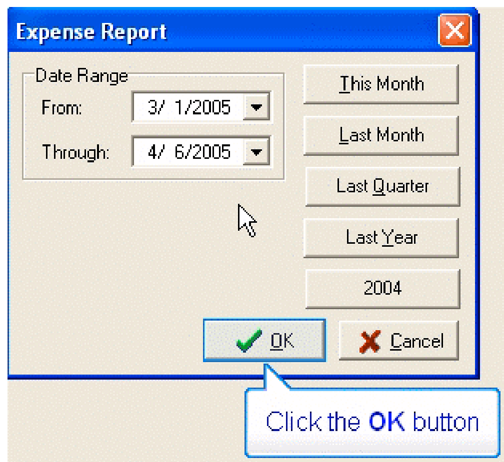


Reports – How can I print out an Expense Report?

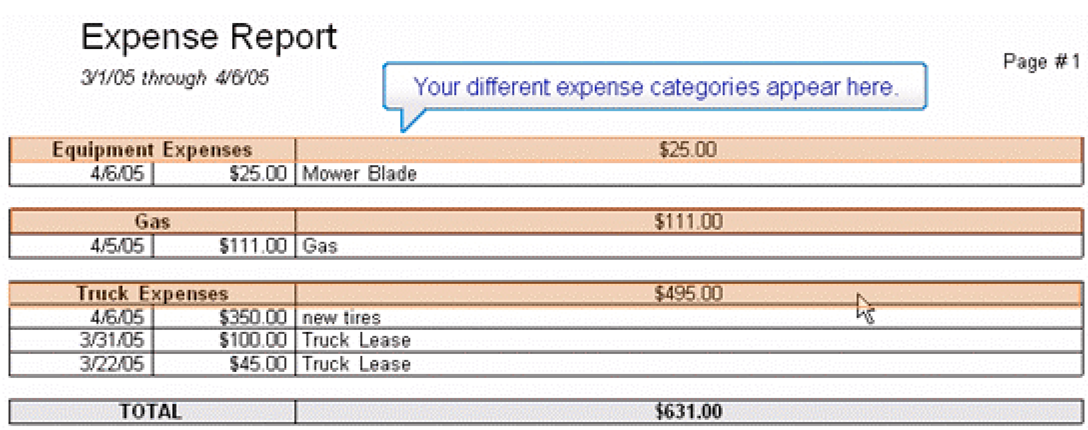
- To print a a report of your expenses, click on the reports section of Gopher.
- Click on the expense tab at top.



- Choose the date range you want your expenses report from.



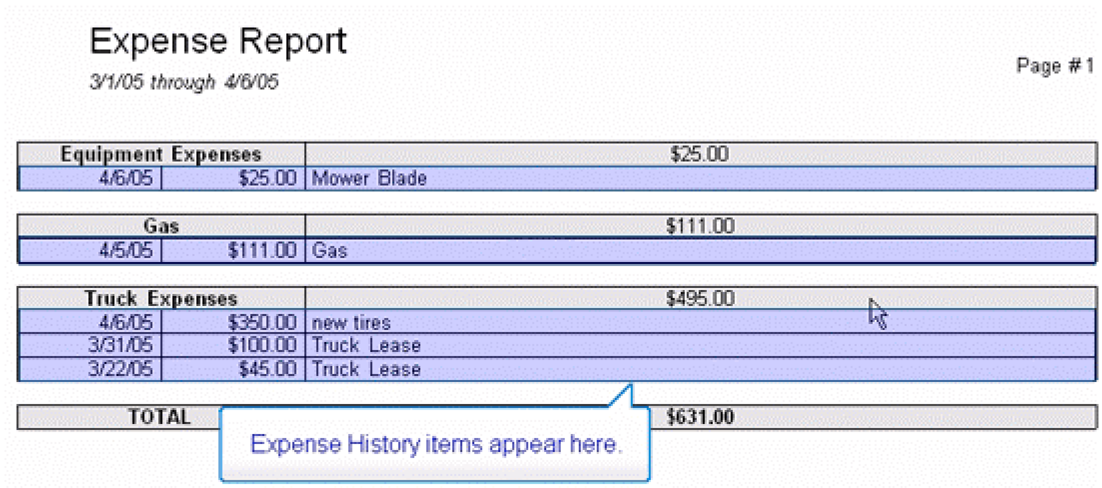
- Preview or print your Expense Report. Your Expense Categories are highlighted orange in this example.



Equipment Expenses		$25.00
4/6/05	$25.00	Mower Blade
Gas		$111.00
4/5/05	$111.00	Gas
Truck Expenses		$495.00
4/6/05	$350.00	new tires
3/31/05	$100.00	Truck Lease
3/22/05	$45.00	Truck Lease
TOTAL		$631.00

Reports – How can I print out an Expense Report?

- Expense History items are shown here in blue highlight.



Expense Report

3/1/05 through 4/6/05

Page # 1

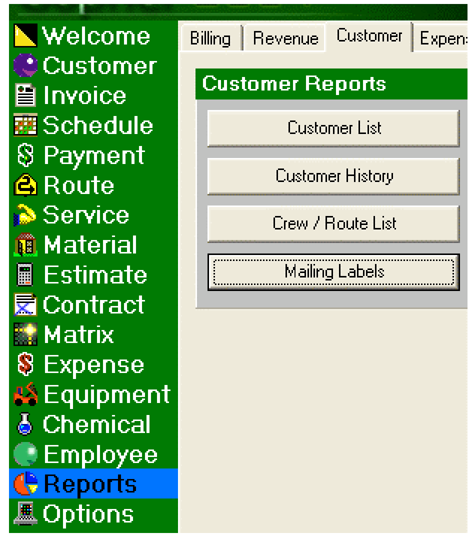
Equipment Expenses		$25.00	
4/6/05	$25.00	Mower Blade	
Gas		$111.00	
4/5/05	$111.00	Gas	
Truck Expenses		$495.00	
4/6/05	$350.00	new tires	
3/31/05	$100.00	Truck Lease	
3/22/05	$45.00	Truck Lease	
TOTAL		**$631.00**	

Reports – How to print mailing labels.

- **Remember** your invoices are designed to be folded and inserted into a clear windowed envelope so you shouldn't need to print mailing labels to send out your invoices.

- Make sure you are on the Report section

- Click on the Customer tab and then the "Mailing Labels" button.

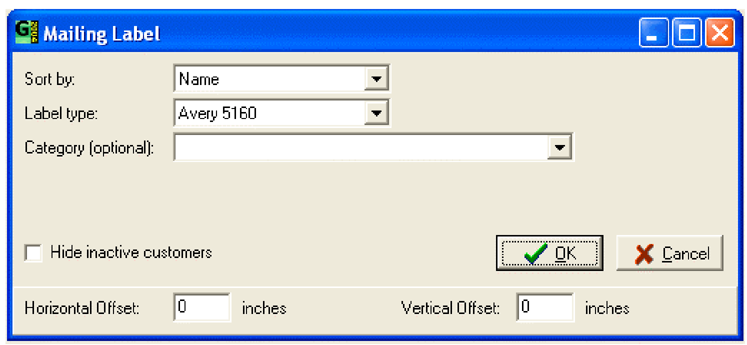


- A mailing labels window will appear.

- Choose how you want the labels sorted.

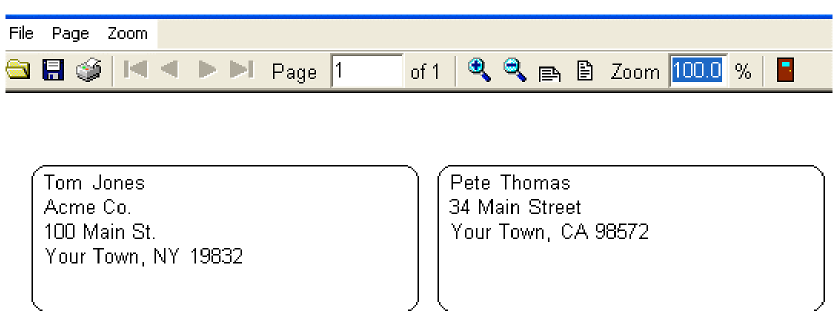
- The label type number.

- The customer category or leave blank for all customers.



- Also choose if you don't want to include inactive customers.

- You can then choose to preview the mailing labels report and then print.



Options

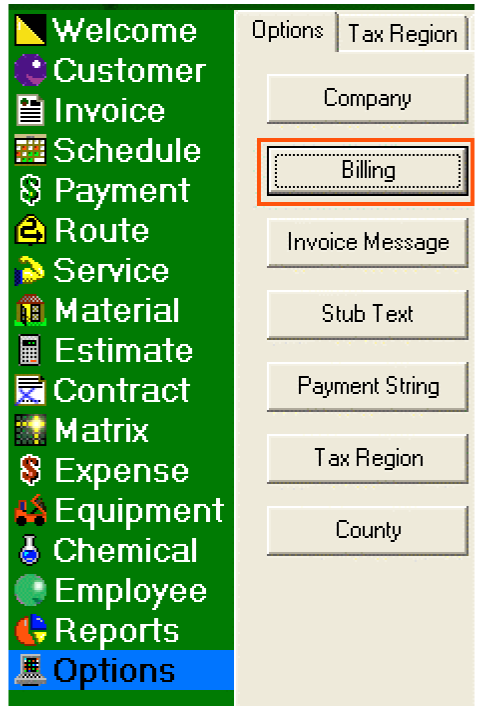
The basic function of the "Options" page is to configure the settings in your Gopher program. At the top of the Options window, you will see five tabs: "Options", "Tax Region", "Payment Terms", "County", and "Database."

<u>Frequently Ask Questions for the options section.</u>

- How can I add a logo image to my invoice? Page - **135**
- How can i move the placement of the addresses on the invoice? Page - **136**
- What does the stub text do? Page - **137**
- How do I set up different sales tax regions? Page - **138**
- How do I set default payment terms? Page - **140**

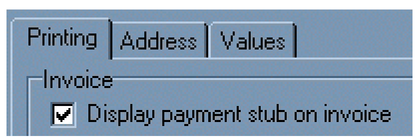
Options – Options Tab - Billing Button - Printing Tab.

- Make sure you are on the Options section and then click on the Billing button.

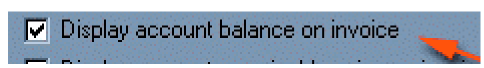


Invoice settings

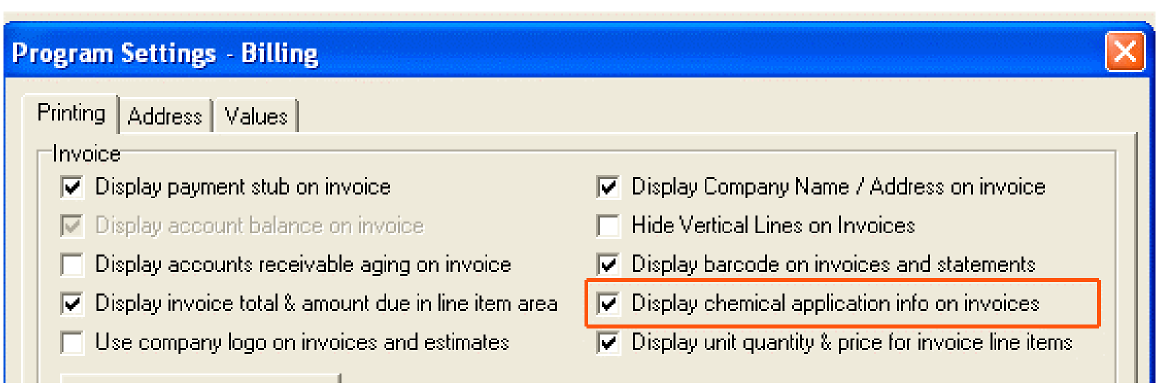
- Invoice Stub toggle (on/off).



- Turn Display Account Balance on Invoice (on/off).



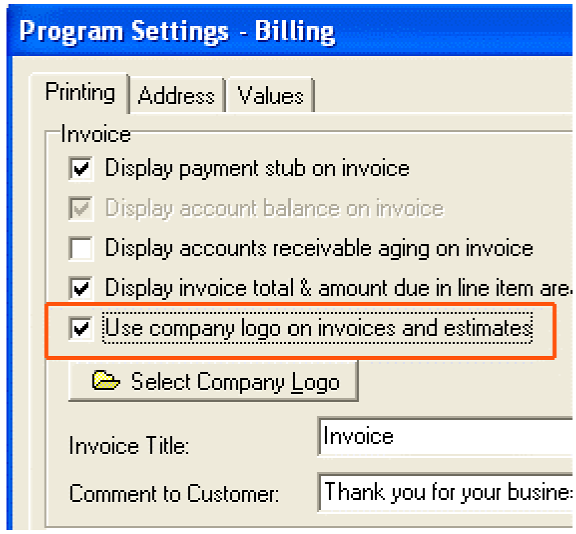
- Toggle invoice to display chemical information (on/off).



Options – Options Tab - Billing Button - Printing Tab.

To add a logo to your invoice:

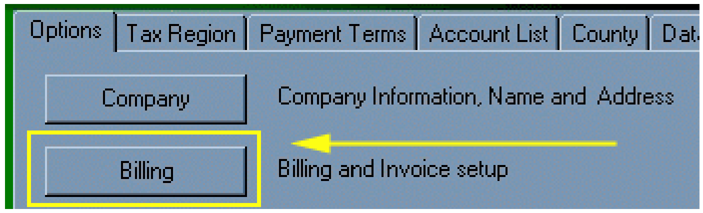
- Click the "Select Company Logo" button to choose a bitmap or jpeg image to appear at the top left of your invoice.
- Your logo image should be either a bmp or jpg file. The program will make the image 1" high and maintain the image proportions.
- Make sure your logo is saved on your computer hard drive and not on a floppy.
- Also make sure the Use company logo on invoice box is checked.



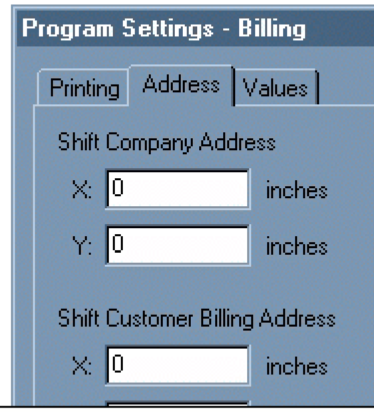
- You can also set up your sales tax settings in the center of the screen.
- Choose your default schedule type here.
- At the bottom you can choose to show recent payments on your invoices.

Options – Options Tab - Billing Button - Address Tab.

- Use this section to manipulate the position of your company address and your customer billing address on invoices. Entering a change in the X field will move the address left or right and a change in the Y will move the address up or down. This may be necessary depending on the type of windowed envelopes you use.

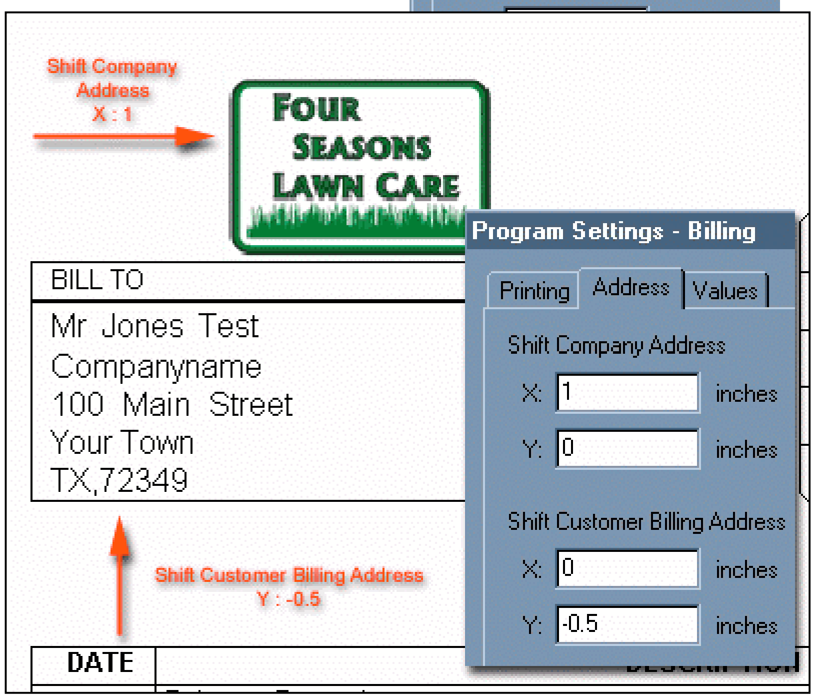


- Your logo size must be taken into consideration. Too wide a logo will make it difficult if not impossible to fit the address properly.



- You can shift the company and customer address to fit perfectly.

- Here is a more detailed look.



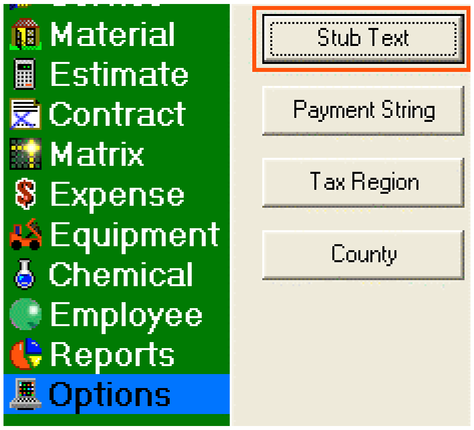
Options – Options Tab Stub Text.

Question: What would the "stub text" be used for?

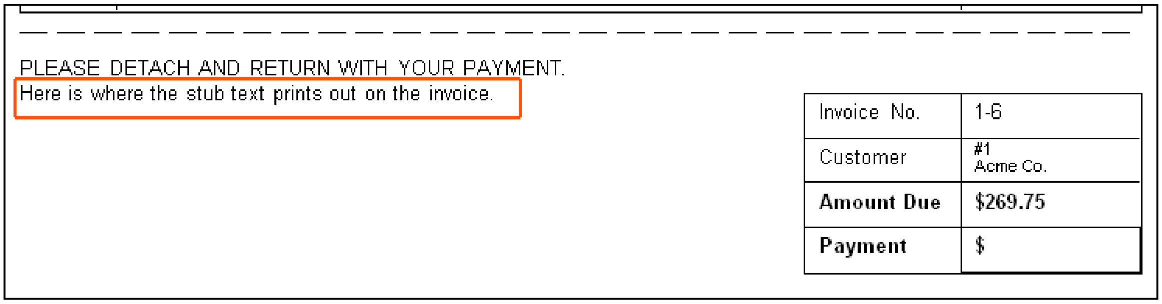
Answer: You can use the stub text for things such as :

- Please make checks payable to....
- Thank you for your business.
- Mail your payment to....

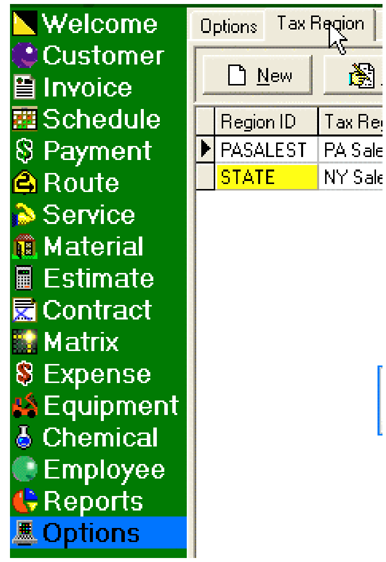
- You can edit the invoice Stub Text by clicking on the options page then click on the Stub Text button.



- Here is where the stub text is printed out on the invoice.



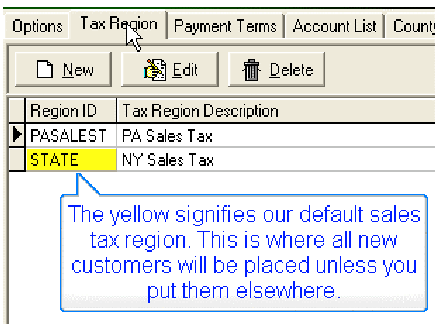
Options – Tax Region Tab



Set up your different sales tax regions here. The highlighted yellow entry is your default sales tax region. Learn more about how to print a tax summary report here.

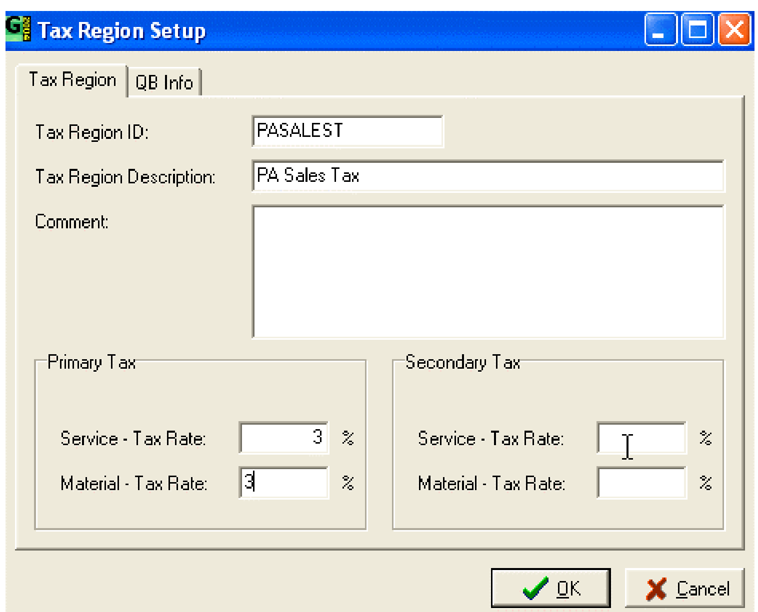
- Step 1: You want to make sure you are on the Options page and click on the Tax Region tab located at the top.

- The yellow signifies this is the default sales tax region. You can't delete the default region but you can edit it.



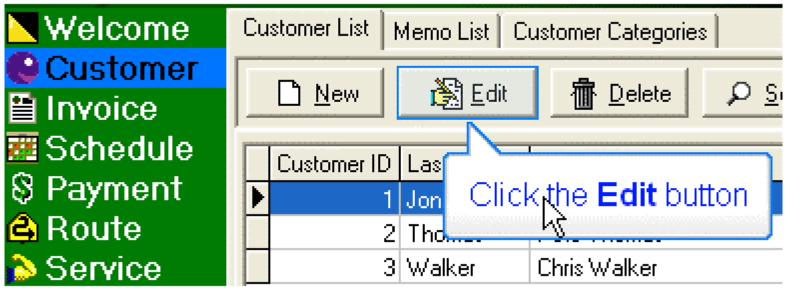
- Step 2: Click the new button to create a new region or click the edit button to edit a region already created.

(Optional) Use the secondary tax if you need to collect a municipal tax or in Canada if you need to collect GST tax

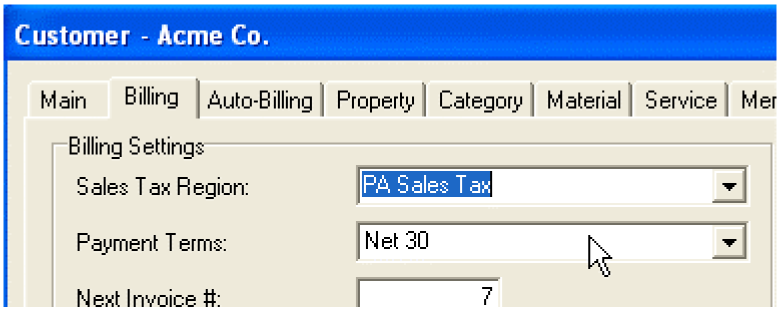


Options – Tax Region Tab

- Step 3: Now to edit the tax region for a customer, click on the Customer section, highlight a customer and click the edit button.

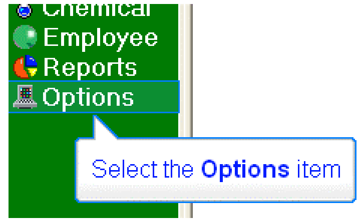


- Step 4: A customer window will appear. Make sure you click on the Billing tab. You can then choose which tax region this customer lives in. Click ok when finished.

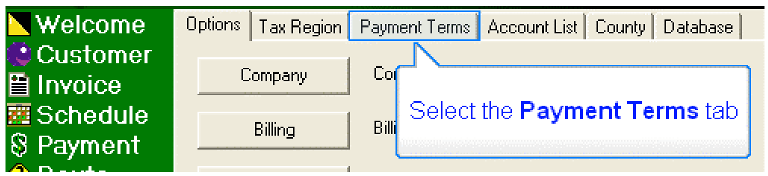


Options – Payment Terms Tab

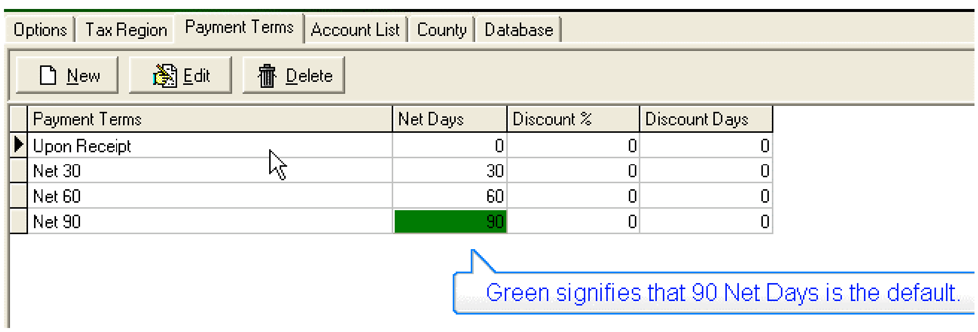
- Set up your invoice payment terms here. The entry that is in green is your default payment term setting.
- Choose the options page along the left side of the screen.



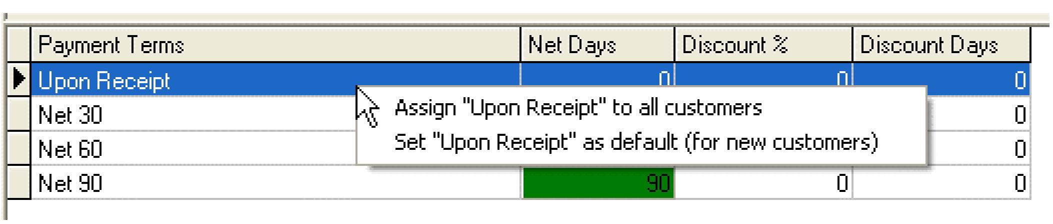
- Select the payment terms tab



- Green signifies the default setting. This is what each new customer's payment terms will default to unless you tell Gopher otherwise.



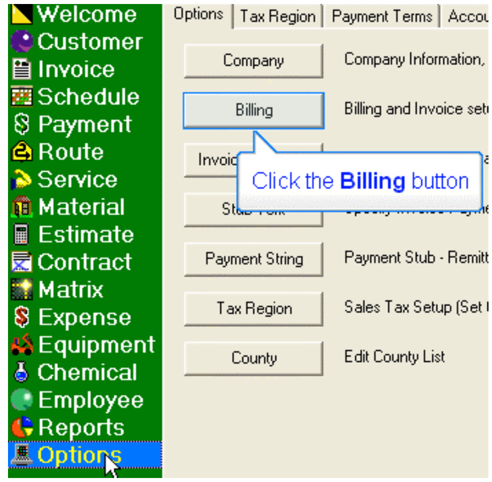
- To change the default settings, RIGHT click on the payment term you want to be the default. Then LEFT click on the pop up menu if you either want to assign this default to every customer or just to new customers from this point onward.



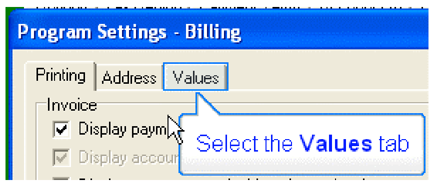
Options – Options Tab - Billing Button - Value Tab

- You have the option on this page to make your invoices Sequential in their numbering or choose Customer Specific. Sequential means that each invoice that is created is numbered one more then the last. Customer Specific Invoice ID is often chosen when you don't want your customers to know how many customers you have, by their change in monthly invoice #.

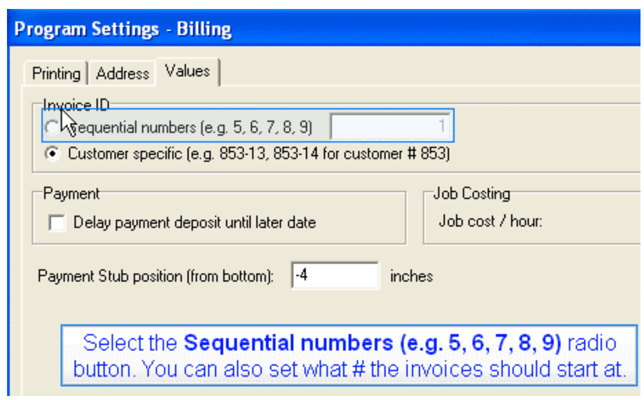
- Make sure you are on the Options page and click on the Billing button.



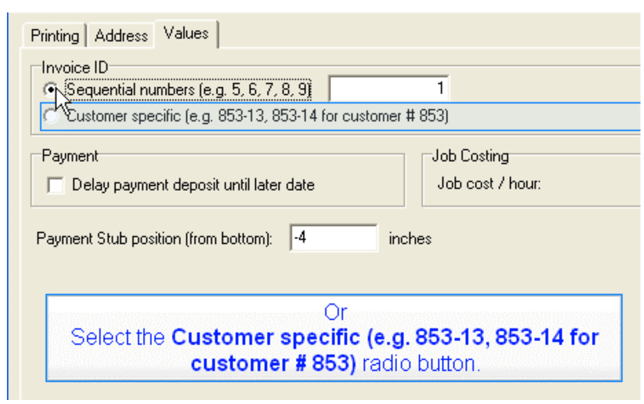
- Click on the values tab.



- You can choose sequential numbers or



- You can choose customer specific numbers.



Index

B

Bar Code Wand 76

C

Chemical...109
Chemical - Entering a New Chemical 110
Chemical - Recording Weather Data For Invoice Reporting 111
Contract 87
Contract - Contracted Services Question..........90
Contract - New Contract..................................88
Contract - Special Fields..................................91
Customer 22
Customer - Active or Inactive Setting 28
Customer - Auto-Billing..................................24
Customer - Categories for Daily and Monthly Billing 31
Customer - Categories for Snowplowing 36
Customer - Crew Comments For Jobs.............38
Customer - Entering A New Customer............23
Customer - Export Customer List....................30
Customer - Initial Balance...............................29
Customer - Multiple Properties 27
Customer - Payment Terms 26
Customer - Sales Tax Regions.......................138

E

Employee...114
Employee - Entering a New Employee 115
Employee - Set up Work Schedules and Build Timesheets..116
Equipment 104
Equipment - Equipment Tracking 106
Equipment - New...105
Estimate 83
Estimate - Default Settings 85
Estimate - Entering a New Estimate 84
Expense 99
Expense - New Expense 100

I

Invoice 40
Invoice - Account Balance Toggle 134
Invoice - Creating a New Manual Invoice........42
Invoice - Display Chemical Information Toggle 134
Invoice - Duplicate Prices Problem 48
Invoice - Envelope Size...................................43
Invoice - Inserting Phone Number In Invoice ..46
Invoice - Late Fees 49
Invoice - Logo 135
Invoice - Logo Position 136
Invoice - Numbering Option Setting 141
Invoice - Paid & Special Checkbox................. 53
Invoice - Payment Stub Height........................ 51
Invoice - Printing Chemical Info on Invoices.. 54
Invoice - Printing Multiple Invoices................ 44
Invoice - Quick Pay 52
Invoice - Separate Invoices for each property. 60
Invoice - Stub Text 137
Invoice - Stub toggle..................................... 134
Invoice - Templates 50
Invoice - Ungenerate Invoices 47

M

Material.. 81
Material - Entering a New Material................. 82
Matrix 94
Matrix - New Matrix....................................... 95
Matrix - Snow Plow Example.......................... 97

O

Options 133
Options - Options Tab - Billing Button - Address Tab 136
Options - Options Tab - Billing Button - Value Tab 141
Options - Payment Terms Tab 140
Options - Stub Text....................................... 137
Options - Tax Region Tab 139

P

Payment 74
Payment - Entering a New Payment................ 75
Payment - Using Barcode Wand...................... 76

Q

Quick Start 4
Quick Start - Step 1. Enter Your Customers...... 5
Quick Start - Step 2. Enter Your Services 6
Quick Start - Step 3. Set Up Your Routes 8
Quick Start - Step 4. Schedule Your Jobs........ 10
Quick Start - Step 5. Print Your Jobs............... 15
Quick Start - Step 6. Complete Your Jobs....... 17
Quick Start - Step 7. Generate Your Invoices.. 20

R

Report - Difference Between Invoices and Statements... 120
Reports.. 118
Reports - Accounts Receivable...................... 122
Reports - Chemical History 128
Reports - Creating a PDF Statement.............. 124
Reports - Customer List................................ 121
Reports - Expense 130

Reports - Mailing Labels 132
Reports - Route List..119
Reports - Sales Tax Summary 126
Reports - Service Revenue 129
Reports - Upcoming Payments.......................123
Route 77
Route - Enter a New Route...............................78

S

Schedule 55
Schedule - Bill In Advance...............................72
Schedule - Completed Jobs Tab 68
Schedule - Completed Wrong Job Dates..........71
Schedule - Creating a one time job...................61
Schedule - Delete a Job 67
Schedule - Entering a New Job.........................56
Schedule - Generate..59
Schedule - Job Clusters
Job Clusters.. 66
Schedule - Job List Tab 70
Schedule - Job Series....................................... 63
To Create a 4 or 5 Step Lawn Aplication
Program 63
Schedule - Postpone Jobs 69
Schedule - Print Out Specific Pages From Job
Report 16
Schedule - Start & Stop Time.......................... 19
Schedule - View Upcoming Job Dates 70
Service 79
Service - Entering a New Service.................... 80

T

Table Of Contents... 3