Blue Box Invoices Manual

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Manual Version 1.1
for
Blue Box Invoices Version 1.1

12/16/98

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Registration

After you begin using Blue Box Invoices and find out how easy it is to use, you'll probably want to register it. At least I hope that you'll want to register it. This program is designed to save you time and money, and I truly hope that it does. If you find that it doesn't, feel free to stop using it, but if you find that it does, please register it for the small fee of $20.00 (US). To register, all you have to do is follow the directions that appear when you open the program (the first screen—scroll down to complete, print, and mail the form). When your check is received, you will be mailed (or e-mailed) a registration code that will unlock your copy of Blue Box Invoices. Note that I am trusting you here, and will not be holding the check for 10 days to clear, I'll be sending the code out right away.

Please support your fellow consultants!

About Blue Box Software and Consulting

Blue Box Software and Consulting consists of Jay R. Kellett (that's me) and several associated companies and consultants. We are about as small as they come, but take great pride in the work that we accomplish. The goal of Blue Box Software and Consulting is to specialize in the field of software development for training and performance support. While most of our work is done on a contract basis, it is our goal to develop and bring to market several tools that solve general market needs. If feel that we may be able to help you, please contact Jay R. Kellett at (610) 738-0235, or write to:

>	Jay R. Kellett
>	Blue Box Software and Consulting
>	218 New Kent Drive
>	West Chester, PA 19380

You can also visit our web site at **`www.BlueBoxSW.com`**.

About Blue Box Invoices

Blue Box Invoices was created to allow consultants, contractors, freelancers, and very small companies to quickly generate and track invoices. It is aimed at being a balance between "ease of use" and "general applicability" for all types of invoices. Each invoice contains information about you or your company, information about the client, and specific billing information. Invoice information is broken out into "Labor" and "Items." "Labor" relates to work done at an hourly wage, performed on a specific date. "Items" refers to anything else (usually with a fixed cost and quantity associated with it). This will be explained in more detail later.

Blue Box Invoices also has many features that allow you to look only at invoices that relate to specific clients, and to pull information from them. For instance, you will be able to easily see how much of your revenues were generated from a specific client— and how much of this has yet to be paid.

<u>Thanks to the early users of Blue Box Invoices Version 1.0</u>

Chris Kellett • Tracey Daniels • Michael Vagell • Eric Fletcher S.O.C. • Len Cooley • Douglas Tourtelot • Nick Velharticky • Cole Camplese • Bill Burke • Jouni Välimaa • Eric DeBlackmere • Dan McCormack • Vicki Silbert • David Wendlinger • Tobe Carey • Jeffery Wolfe • Brian Connell • Lou Judson • Bill Nesbitt • Denny Furey • Adam White • John Cheak • C. Tucker • Monte Matteotti • Elizabeth J. Hanson • Don Zenz • Charles Thomas • Chris Mansfield • Test • Jan Skorzewski • Dean Tomasula • Frank Scheidt • Allen Lannan • Bob Hansmann • Richard Lo • Ross Bishop • L. D. Ford • Brian Schultz • Roger M. Poor • John Berthet • John Kane • Edison M. Cesar, Jr • Richard Luke • Richard L. Crawford • Jose Gonzalez • Craig Dial • Bill Manning • Kenneth P. Frankel • Ira Goldman • Pam Atkins • Michael Goh • Reinhard • Olivier Diebold • Christopher Arnold • Chris Benham • Richard Perry • Royce K. DeBow Sr. • Pat Glover • Robert E. Williams, Jr. • Daly Jessup • David Whitehead • Matvey Palchuk • Ian Scott-Parker • Todd VanVranken • Paul Ruspay • Jonathan A. Duke • Ralph Isaacs • Robert Monk • Paul Ruspay • John A Horton • William Metzger • David Raffin • Robert Fremault • Bill Byers • Al McGuire • Martin S. Zibulsky • Dr. Krystyna Isaacs • Al Hurlburt

What's New in Version 1.1?
This version has been guided by the feedback from users of version 1.0. While we couldn't add everything, we think that we chose the features that will allow the most users to get the most power out of this tool while keeping it as simple as ever to use.

Major changes include:
- Taxes! Probably the most requested feature. BBI now allows you to automatically add taxes to your invoices without ever having to pull out the calculator ever again. You may incorporate taxes in some or all of your invoices, and may even use different rates for different invoices.
- Flexible Invoice Numbering. You may now override the invoice number generated by the program. This has been requested by users who are migrating from other systems, and by users who like to reflect clients or timeframes in the numbering scheme. You may skip numbers, back-number, and recycle numbers if you so choose.
- Line Item Revenues. Now you can link revenues directly back to specific line items from the **Labor** database or the **Items** database. Perfect for tracking rentals or break-even points.
- Quarterly Tools. Browsing invoices shows the quarter along with the date. You can now find invoices within a specific year or quarter with a single mouse click.
- Client Tools. You can dial your clients using the modem, open an e-mail to them, or go directly to their web site with a single click (Some of these options vary with your system and configuration).

Upgrading from Version 1.0?
Check the install folder for a file called "upgrade.txt" which contains detailed instructions for importing your 1.0 information into 1.1. You should follow these directions and back up your old data to a safe place.

How it works

About the Databases

Blue Box Invoice is made up of four databases that work together to track invoice information. These databases are called **Invoices**, **Clients**, **Labor**, and **Items** (when we refer to the database specifically, we'll bold it). It is important for you to understand how they relate to each other in order to get the most out of this program.

"Invoices" Database

The **Invoices** database is the central database where most things happen. It is here where you will enter new invoices, relate them to clients, enter your billing information, and browse previously entered invoices.

"Clients" Database

The **Clients** database is where information about a specific client is stored. When you get a new client, you will come into this database and enter details about your contact, the billing address, and other information. It also allows you to come back later and look at summary information about your client, including revenue totals and invoice listings related to this client.

"Labor" Database

The **Labor** database allows set up default labor items, for quick entry into your invoices later. For instance, if your standard rate is $50.00/per hour and your typically work day is 8 hours, you can enter a labor item called "Standard Day" and include default values of $50.00 for the hourly rate, and 8 hours under "1x" (single-time). This will allow you to enter this labor-item later on your invoices with a single click.

"Items" Database

The **Items** database allows you to enter default items which you might bill your client for, which don't relate directly to specific hours. You can use this to enter expenses encountered during the workday, milestone payments, or retainers.

How They Work Together

```
┌──────────────────────┐
│ Labor Database       │──────┐
└──────────────────────┘      │
                              ├──▶ ┌──────────────────────┐        ┌──────────────────────┐
┌──────────────────────┐      │    │ Invoices Database    │◀─────▶│ Clients Database     │
│ Items Database       │──────┘    └──────────────────────┘        └──────────────────────┘
└──────────────────────┘               │
                                       ├──▶ Print Invoice
                                       └──▶ Print Envelope
```
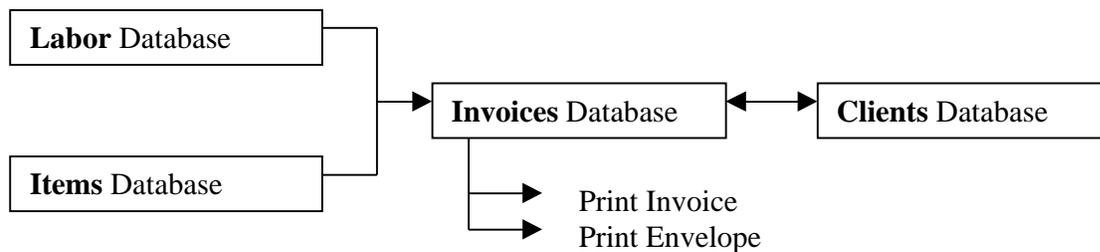
The **Invoices** database is where most of the action happens. After you enter default values into the **Labor** and **Items** databases, these values become available to you in the **Invoices** database. When you enter clients, they too, become available for selection within the **Invoices** database. On a typical day you will be able to enter the **Invoices** database, generate a new invoice, select the client, labor, and items that apply, and print it without ever having to enter the other databases.

The **Clients** database is always working behind the scenes to keep track of your clients, how much they have paid you, and how much they still owe you.

Printing happens from the **Invoices** database. This allows you to print an individual invoice and to print envelopes to mail it in. Of course you can also print multiple copies of the invoice for your records from here, too.

Understanding Databases and FileMaker Pro

If you are already familiar with the workings of databases and FileMaker Pro, you can skip this chapter and move on. If you are new to databases or FileMaker Pro, you should at least breeze through this chapter so that you'll be able to reference it later if you need it.

About Databases

Databases, in general, are collections of similar types of information. Inside computers databases are formal structures of information with formal names for each part. Don't let this scare you. Once you get the hang of one database program, you will find they all become familiar. To explain the difference, let's assume that we have a phone book. For our example, it will be a very *small* phone book. We open the phone book to the B's, which only contains two entries:

B
```
  Buffet, Warren  16 Value-Added Place  555-5555
  Buffett, Jimmy  101 Parrot Lane       555-1234
```

In human terms, what we just did was open the phone book to the "B's", and looked at what we found. But in database terms, while we did the same thing, there are more complicated terms to describe it. First of all, since the phone book is a collection of pieces of data, we would call the phone book a database. Second, when we opened the book to the "B's" we performed what is called a "Find." Third, the information is arranged by alphabetical order by name. This is called a "Sort," meaning that the data was sorted in an intentional manner (in this case, alphabetically).

This is how things that are really simple become complex sounding- "I browsed the Sort of the Find from the Database" in this example is just a complicated way of saying "I looked at the 'B's' page in the phone book."

Now let's look at how we refer to specific pieces of information. The building blocks of databases are fields and records. Together they define the structure of the database- and frequently people confuse the two. In our phone book example, each line could be called a record. Think of it as a set of data that belongs together. "Jimmy Buffett" lives at "101 Parrot Lane" and has the phone number "555-1234." This is a record because it represents information that is supposed to be connected, and has what we call a "one-to-one" relationship, meaning that Jimmy Buffet has only one phone number, and the phone number has only one owner, Jimmy. The same could be said about the address. So in our example, we are looking at two records.

Now let's explain fields. Fields are pieces of information that are represented in each and every record. There are three fields of information in our example, they are "Name," "Address," and "Phone Number" (You could even argue that there are four fields of information of you break "Name" into "First Name" and "Last Name." For simplicity we won't do this). Think of our example it like this:

Name	Address	Phone Number
Buffet, Warren	16 Value-Added Place	555-5555
Buffett, Jimmy	101 Parrot Lane	555-1234

All records in a database have the same number of fields, since all fields are represented in some way within each record, even records that fall outside of the "B's" (By the way, even if a field is blank inside of a record, it is still considered to exist).

Now let's say that we want to call our friend Jimmy Buffett to invite him to a party. It human terms, we are looking for his phone number, but in database terms, we want to search for the record with the "Name" field equal to "Buffett, Jimmy" and read the "Phone Number" field of that record.

Confused? What we are really saying is that you want to use your finger to browse the "Name" field ("Search for the Record") until you find "Buffett, Jimmy" and then move your finger over to the "Phone Number" column (read the "Phone Number" field) to find his number.

Now let's make things slightly more complicated. Sometimes more than one database is used so that information can be shared among the records. Each record in one database points to a record in another database. This is called "Relating" the records. In a simple example, say there was another database that the Phone Company stored billing information in that looked like this:

Phone Number	Bill
555-0235	$65
555-1234	$50
555-1235	$40
555-5555	$35

Since both databases have the "Phone Number" field, we can use this field to relate the databases. If we need to know Warren Buffet's phone bill, we can use our phone book to look up his phone number (555-5555), and then use his phone number to look up his bill ($35).

The biggest advantage in relating information in this manner is that it allows you to create "one-to-many" relationships. In the invoicing program, we use this technique to share client information among all invoices that are related to that client. This saves you the trouble of re-typing in most information (i.e., addresses) and also allows you to quickly locate and analyze invoices related to a specific client.

Common Database Terms

Below is a listing of common database terms that you should be familiar with. Refer back to this list if you are unsure what the term means when you encounter it in this manual.

Database	A grouping of multiple pieces of similar types of information. For instance, a phone book is a database of names, addresses and phone numbers, where each listing has one of each (a name, an address, and a phone number).
Record	A single occurrence of a set of information. In a phone book, a record would consist of a name, address and phone number.
Field	A single piece of information that is represented within each record. In a phone book, each record contains three fields, name, address, and phone number.
Screen or Layout	The order in which information is arranged for the user. A database might display its information in a variety of different layouts. It is not necessary for a layout to show each field within a record; some may be hidden but still exist in the record. A phone book only has one layout- columns.
Find	The process of locating only certain records that meet specific criteria. Records that match the criteria are shown and those that do not match are temporarily hidden. If we could take a phone book and locate only the entries that lived on your street, that would be a "Find".
Sort	The process of taking records and organizing them based on some criteria. This might be done to a whole database or it might be done only to records that were the result of a "Find." If we took all of the entries from the phone book, found the ones that lived on your street, and then arranged them by house number- this would be a "Sort." Also a phone book is the product of *sorting* all records by name.
Relate, Relating, or Relational	The process of linking one record in a database to another record in a different database, so that they can share information.

About FileMaker Pro

FileMaker Pro is the name of the database program that Blue Box Invoices is developed in. You do not need to own FileMaker Pro, since Blue Box Invoices is packaged as a stand-alone application. FileMaker Pro has some capabilities within it, however, that compliment Blue Box Invoices and also some that are **not** directly supported within Blue Boxes Invoices. A brief explanation of the features of FileMaker Pro follows.

Status area
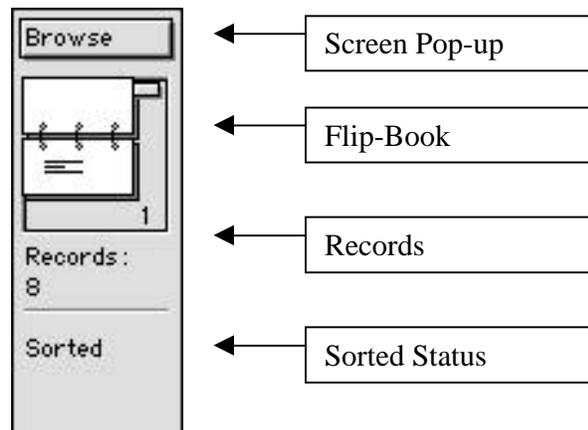
The status area contains a brief overview of the database you are currently in. The status area always appears on the left side of the database. Elements of the Status area are:

- Screen Pop-up- This is an alternate way of changing screens within the database. Notice that Special screens (i.e., Print) do not appear on this menu.
- Flip-Book- This is a miniature flip-book that represents the database you are in. You can use this by clicking either page to move forward to backward, or use the tab on the right to move quickly through many records. If you have performed a Find, this book will only let you browse the found records. To undo this, select "All" from the "Find" row on the "Navigation Bar" while in the "Browse" screen of the **Invoices** database.
- Records- Shows how many records are contained within the current database.
- Found- Only shows after performing a "Find." Tells you the number of records you are browsing as a result of the find (not shown in diagram).
- Sorted Status- Tells you if the records you are browsing are sorted or not.

The Menu Bar

The Menu Bar at the top of the screen allows you to access the built-in features of FileMaker Pro. Each menu is explained in more detail below.

File Menu

The following items are available from the file menu:
- Print Setup- This allows you to change features related to your printer.
- Print- This allows you to tell FileMaker to print a screen. You should use the "Print" available in the "Control Bar" instead.
- Import/Export- In general you should stay away from these features unless you are familiar with the working of FileMaker Pro.
- Save a Copy- You should avoid using this feature since it will duplicate the current database and may cause problems later
- Quit- This shuts down Blue Box Invoices and FileMaker pro, returning you to your operating system.

Edit Menu

The following items are available from the Edit menu:
- Cut, Copy, Paste, and Clear- Use these to edit and move text inside of text fields.
- Select All- Use this to select all text within a text field.
- Preferences (Application and Document)- In most cases you will probably not need to adjust these, since they are already set-up properly. The mostly likely reason for changing these preferences would be if you wanted to configure your modem to dial properly from the **Clients** database.

Mode Menu

You will not need any of the items found under this menu, since they duplicate items found in the **Control Bar** and the **New** menu.

Select Menu

You will not need any items under this menu, since they duplicate items found in the **Control Bar**.

Format Menu

These items may be used to modify text inside of text fields. The following items are available and usable in *most* (but not all) text fields:
- Font- Modify the font.
- Size- Modify the size of the font

- Style- Add and modify the style of the font.
- Align Text- Align text within the field.
- Line Spacing- Change the spacing of the text.
- Text Color- Change the color of the text
- Text…- Modify many parameters of the text at once.
- Text Ruler- Add a text ruler and toolbar to the screen. Allows placement of tabs and adjustment of margins.

New Menu

These items allow the creation and deletion of records within a database. These commands are also available from the Control Bar.
- Invoice- Switches to the Invoice database and creates a new invoice record.
- Client- Switches to the **Client** database and creates a new client record.
- Labor- Switches to the **Labor** database and creates a new labor record.
- Item- Switches to the **Item** database and create a new Item record.
- Delete- Deletes the current record in the current database. Be careful with this option, as it can not be undone!

Window

Provides an alternate method of switching between databases. You do not need this since it is a duplicate of functionality found in the Control Bar.

Installing the Program

Macintosh

Minimum Requirements
- Mac OS based computer, System 7.1 or later
- 8 megs of RAM
- 5 megs of free hard drive space

Set-up Instructions
- From the Blue Box web site (**www.blueboxsw.com**), download "BBI-11.sit".
- Expand this file with Stuff-It Expander (available at **www.aladdinsys.com**).
- You should now have a folder called "Blue Box Invoices 1.1" on your hard drive.

IBM-PC or Compatible

Minimum Requirements
- 486 or Pentium, Windows '95 or above
- 8 megs of RAM
- 5 megs of free hard drive space

Set-up Instructions
- From the Blue Box web site (**www.blueboxsw.com**), download "BBI-11.zip".
- Expand this file with Win-Zip (available at **www.winzip.com**).
- You should now have a folder called "Blue Box Invoices 1.1" on your hard drive.

The First Invoice

Opening the Program

To open to program, open the folder called "Blue Box Invoices" on your hard drive and click on the application called "Blue Box Invoices." This will start the program, and will open each database files for you. Once this is done, the program will show you an overview of all invoices entered into the system. This is called the "Browse" screen.

The Control Bar

Most navigation in this program is done using the control bar. The control bar is the collection of commands that appear at the top of the screen. The command bar has several rows that allow navigation and perform special functions. These functions change depending where you are in the program.

On the left of the first row of the control bar are the "Databases." This allows you to switch among the four databases. In order to change to a new database, just click on the title. The database you are currently in is colored in yellow, while the available databases are colored in light blue.

On the right of the first row of the control bar are the "New" commands. These replicate commands in the "New" menu. They can be used from any database to create a new record in any database, including the one you are in currently.

The second row of the control bar is labeled "Screen." This allows you to switch between the active screens within a database. The **Labor** and **Items** databases only have one screen, "Browse". The "Invoices" database has three user screens and a special forth screen for printing (this screen is only used for printing).

Other special commands include "PrintEnvelope" and "Find" commands that come up only on specific screens. You can find more information on these commands in the "Reference" section.

Entering Global Information

Before using the program to generate invoices, you need to enter information specific to your company or business. You do this by selecting the "Global" screen from the Control Bar.

Databases: Invoices Clients Labor Items
Screen: Globals Browse Entry

All invoices are printed with a header and footer. The header consists of a 100x100 pixel graphic logo, the company name, and the address. The footer is a large text area where you can add any supplemental information that all invoices will need attached to them. This might include your tax ID number, payment terms, contact phone number, or any other pertinent information. This text can be formatted using the "Format" menu at the top of the screen.

Header Information

BlueBox
Software and Consulting
218 New Kent Drive
West Chester,PA 19380

Header and Footer information is used to build and print you invoices and envelopes. This diagram shows a simple invoice and where this information is filled in.
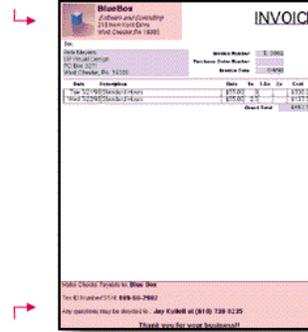
Footer Information

Thank you for your business!

You can replace any of the existing text by selecting it and typing over it. You can also paste the text in from another program if you prefer. The graphic logo can be replaced by:
• Copy a new logo from another source (scrapbook, etc).
• Select the box containing the logo on the "Globals" screen by clicking on it once.
• Select Paste from the edit menu.
• Your new logo should appear in the box.

You may also set-up tax defaults from the Globals screen. For more information on the Globals screen, refer to the reference on page 24.

Entering Labor Records

After entering the "Globals" information, you should switch over to the **Labor** database and begin filling out your standard labor items. You can switch over by selecting "Labor" from the "Databases" line of the "Control Bar."

To create a new labor option (really a "record" in database terms), select "New Labor" from the "New" menu or "New: Labor" from the control bar. You should create at least one record, and can create more if you like. You can also modify an existing option if you want.

Databases: Invoices Clients **Labor** Items	New: Invoice Client Labor Item						
Screen: **Browse**							

Labor Index	Description	Rate	1x	1.5x	2x	Cost	Revenues
1	Standard Day, 8 Hour	$50.00	8			$400.00	$0.00
2	Standard Day, 10 Hour	$50.00	8	2		$550.00	$0.00
3	Editing, Off-site	$40.00	8			$320.00	$0.00

For more information on the Labor database, refer to the reference on page 39.

Entering Items Records

Next you should begin entering items into your **Items** database. This is similar to the last set. Select "New Item" from the "New" menu.

Databases: Invoices Clients Labor **Items**	New: Invoice Client Labor Item				
Screen: **Browse**					

Item Index	Quantity	Units	Description	Unit Cost	Cost	Revenues
1	1	cable	Cable, X to Y connector	$10.00	$10.00	$10.00

For more information on the **Items** database, refer to the reference on page 40.

Entering the First Client

Now that you have customized the database for your own use, you can begin entering your clients.

Select "New Client" from the "New" menu.

For now, all you have to worry about is the contact information. For more information, refer to the Client database reference starting on page 35 or the reference for this entry screen on page 36.

Entering the First Invoice

You can enter a new Invoice by selecting "New Invoice" from the "New" menu.

New   Window   Help
New Invoice   ⌘1
New Client   ⌘2
New Labor   ⌘3
New Item   ⌘4
Delete Invoice ⌘5

New: Invoice   Client   Labor   Item

You are now ready to begin entering the invoice information. Since you have already entered the Client information, all you have to do is select the correct client from the pop-up menu (located to the right of the words "Client Index"). This will relate this invoice to the client, which will automatically fill in information such as the client address and revenue information.

Client Information

Client Index	C.0001 Go	Client Mailing Address:
	C.0001	Derrek Grant
Client Revenues		Vice President of Internet Sales
		WorldScape
Paid		105 Office Center Drive
Unpaid	$550.00	Fort Washington, PA 19380
Total	$550.00	
Refresh		

Next you should add labor and items information. Use the pop-up menu to the left of each line to fill it in. Notice that each line is editable after it is filled in. Also notice that you will need to enter the correct date for each labor item in MM/DD/YY format (the day-of-week is added for you automatically). The grand total will be calculated for you automatically as you enter the invoice information.

Labor Information

Labor	Date	Description	Rate	1x	1.5x	2x	Cost	Taxes
x 2	Wed 12/9/98	Standard Day, 10 Hour	$50.00	8	2		$550.00	
x								
x								

Print Your Invoice

Now that you have entered the information, you will have to print out the invoice so that you can send it to your client. You do this by selecting "Print" from the control bar. This will pull together information from your "Globals" screen, **Clients** database, and current invoice record to create an invoice, which is sent to your printer. If you need to select a new printer or want to print multiple copies, you can select those options from the print dialog box that comes up.

Print an Envelope

OK, so now that you have your invoice, how do you mail it? Simple, select the "PrintEnvelope" screen from the control bar. This will go to a special screen that formats your header information into a return address and the client information into a shipping address. The result is sent to the printer. You may have to change your settings in the print dialog box to "manual feed" in order to correctly print on the envelope. All printers seem to handle this slightly different. For more information, see your printer's manual.

Your Next Invoice

Now that you have done all of the set-up for this program, future invoices should be a breeze. If you are sending out an additional invoice to a client already entered, all you need to do is create a new invoice, relate it to that client, and begin entering the invoice Labor and Items. If you need to send an invoice out to a new client, just enter the new client's information first, and then create your new invoice. If you forget and create the invoice before entering the client: No Problem. Just go back to the client database, enter the new client, and when you return to the **Invoices** database, the new client will be available to you in the Client Index field.

All about the Invoice Database

Screens

The **Invoices** database has the following user screens:
- Globals- This screen allows you to control the Header and Footer information.
- Browse- This screen show you an overview of all invoices in the database.
- Entry- This screen allows you to enter, view, and modify information in an invoice.

The **Invoices** database also has the following special screens that are available only on the "Entry" screen:
- Print- When in the Entry screen, this screen formats the invoice and sends it to the printer. When in the Browse screen, the screen prints the list of invoices that are currently being browsed.
- PrintEnvelope-Available only in the Entry screen, this screen allows you to print out an envelope for mailing the current invoice.

Globals Screen

Each invoice that is printed has certain information that stays the same between each invoice (i.e., your company name, address, payment instructions, etc.) Globals allows you to setup and to change this information across all invoices.

This screen is divided into two main parts, header information and footer information. In the middle of the screen is a small diagram showing where the information you enter would show up on an invoice. This small invoice is a static graphic and does not change as you enter information.

Header Information

The header consists of a logo, company name, and address. This information, as is all of the information in Globals, is <u>always</u> identical for <u>all</u> invoices.

Logo

The default logo when you install the program is the Blue Box Software and Consulting logo. Obviously you don't need to keep this, it is just a placeholder until you find or create a logo of your own. The logo that you use should be a 100x100 pixel graphic. It can even be larger than this size, as the program will scale it down to 100x100 when it needs to. I don't recommend this, because you will just be taking up extra space in the database, and it will make your computer spend more time processing the logo when you want to print. If your logo is smaller than 100x100 pixels, the program will just center the graphic in the box and will not scale it. This does not cause any problems when you print. The logo can be in color if you want it to be. If you have a color printer, it should process it just fine, and if you don't, your printer will dither the image into a black and white one as it prints. Some printers do a better job of this than others.
To add a new logo you need to:
• Copy a new logo from another source (scrapbook, etc).
• Select the box containing the logo on the "Globals" screen.
• Select Paste from the edit menu.
• Your new logo should appear in the box.
If you want to clear the logo from the box, select the logo and select "Clear" from the "Edit" menu. This will erase the logo from all invoices. You can always add another logo after doing this.

Name and Address

The boxes to the right of the logo allow you to enter your company name and address. If you don't need the extra line at the bottom, it is a nice idea to add you phone number, too. The first of the four lines is slightly larger and is bolded by default. You can change the styles and the fonts within these boxes to suit your own taste. Remember that the size of the boxes is fixed, and will not expand if you add more text than will fit. If you have an especially long name or address, try reducing the size of the font from the "Format" menu.

Footer Information

The footer is really a box text box in which you can add any sort of information that will be useful to people receiving your invoice. Suggestions include:
• Directions on who to make payable on the check.
• Your tax ID number or social security number.
• Who to direct questions to, and the number to call.
• Your standard payment terms.
• A "Thank-You" for doing business with you.

Tax Defaults

Tax Setup

Labor Tax Method
◉ No
○ All
○ Marked

Items Tax Method
◉ No
○ All
○ Marked

You may choose to automatically add tax to your invoices. Taxes may be applied to labor and/or items. If you want to pick which items/labor are taxed, choose "Marked," which will add tax only to items/labor whose descriptions contain the "Tax Marker" symbol. You will see the total taxes for each line item in your records. Only the grand total for taxes is printed on the final invoice. Enter the tax rate as a decimal. It will show as a percentage. These values are **ONLY** used as the defaults for new invoices.

Tax Rate: `0%`   Tax Marker: `*`

Each invoice has certain tax information stored within it. New invoices are set-up using the Tax Defaults in the Globals screen. Changing these defaults does not change existing invoices, only newly created ones. Tax information of existing invoices is modified in the entry screen. There are 4 items you should set when setting up your tax defaults:

• Labor Tax Method—This tells how taxes should be applied to labor items. "No" means that no items are taxed. "All" means that all labor items are taxed. "Marked" means that only items whose descriptions contain the "Tax Marker" are taxed.

• Items Tax Method— This tells how taxes should be applied to labor items. "No" means that no items are taxed. "All" means that all labor items are taxed. "Marked" means that only items whose descriptions contain the "Tax Marker" are taxed.

• Tax Rate—This is the rate at which to tax labor and items. A single invoice can only have one tax rate, but several invoices can have several different rates.

• Tax Marker—This is only used if Labor or Items Tax Methods are set to "Marked." If so, any line that contains the Tax Marker in the description field will have tax added to it.

The Browse Screen

This screen allows you to browse all of your invoices. It also allows you to search for specific types of invoices, and to sort them. Whenever you open a registered copy of Blue Box Invoices, this is the screen that the program will open to. When opened, the program will show you all of the invoices and sort them by date (with the most recent invoices at the top).

Each invoice is represented by a line of horizontal information containing select fields. Some of the headers on this screen are underlined, indicating that you may sort the invoices by clicking on the header. Some fields are also modifiable in this screen. Screen elements are:

Invoice Number

The automatically generated invoice identification number. Invoices may be sorted by invoice number by clicking on this header.

Purchase Order Number

The purchase order number from the client, if any. Invoices may be sorted by Purchase Order Number by clicking on this header. This field is also modifiable.

Invoice Date

The date that the client was invoiced. Invoices may be sorted by Invoice Date by clicking on this header. This field is also modifiable.

Company

Name of the company that was invoiced. Invoices may be sorted by Company by clicking on this header.

Total Labor Costs

Sum of all labor on the invoice.

Total Item Costs

Sum of all items on the invoice.

Taxes Total

The sum of "Total Labor Taxes" and "Total Item Taxes."

Grand Total

The sum of "Total Labor Costs" and "Total Item Costs."

The Grand Total Header

This header is special because it also contains a dollar amount above it which contains the sum of all invoices being browsed. Notice that when you select a Find, this total will change to reflect the dollar amount of the found set.

Paid

Either "Yes" or "No" indicating whether the invoice had been paid or not. Invoices may be sorted by Paid status by clicking on this header. This field is modifiable by clicking on the checkbox next to the current Paid status.

The Go Button

Each invoice being browsed has a button to the right labeled "Go." This button selects the invoice to which it is attached, and enters the "Entry" screen.

The Find Navigation

Unique to this screen is the "Find" items that appear at the bottom of the control bar. These entries allow you to quickly find a sub-set of the **Invoices** database. After performing a Find, you may also want to perform a sort by clicking on one of the underlined headers. Each of the Find items performs the following functions:

- All- This finds all invoices in the system. Frequently you will want to perform this following another find.
- Paid- This finds all of your invoices that have been paid
- Unpaid- This finds all of your invoices that have not been paid.
- Omitted- This shows all of the invoices that were hidden as a result of the last find, and hides all of the invoices that were shown as a result of the last find.
- 1998, 1999, and 2000—These will find all invoices in a specific year.
- Q1, Q2, Q3, and Q4—Two sets of these exist. One after 1999 and the other after 2000. They will find all invoices within a specific quarter within the specific year.

The Entry Screen

The entry screen contains all of the information specific to one invoice at a time. This information is broken up into five sections:

- Admin. Information
- Client Information
- Labor information
- Item Information
- Notes

Administration Information

The information that related to the processing and categorization of the invoice. Fields of information are:

Invoice number

The serial number given to this invoice. This number is in the standard Invoice format. The number shows both as a regular decimal and in the Invoice Number Format. The decimal number is modifiable and will automatically update the formatted version when the cursor leaves the field.

Purchase Order Number

The number that relates to the purchase order from your client. This number is modifiable and is also optional.

Invoice Date

This reflects the date that your client was invoiced. By default, this is the date on which the invoice was created. You may modify this field.

Paid

This designates whether the invoice has been paid by the client, or not. You can change the value by pressing the checkbox to the left of the "Yes" or "No" value.

Grand Total

This is the total dollar amount of the invoice. This value is not directly modifiable by the user, but updates itself as Labor and Items are added to the invoice.

Invoice Tax Information

Labor Tax Method, Items Tax Method, Tax Rate, and Tax Marker determine how taxes are applied to this invoice. For more information see Tax Defaults on page 26.

Client Information

These fields contain information related to the client being invoiced. The following field are found here:

Client Index

This field contains the client index number that has been related to this index. The information can be entered in two different ways, either by selecting the pop-up menu (on top) or by typing in the client number (on bottom). If you type the client number in the box, it must be in the client number format in order for the system to accept it. You can press the "Go" button to jump to the "Client" database and review this client information.

Client Mailing Address

When you select a client to relate to this invoice, the client's address automatically fills into this area. While this field is not modifiable, you may still select this field for purposes of copying the information out (to create a cover letter, for instance).

Client Revenues

These fields, "Paid," "Unpaid," and "Total" show you the amount of revenue generated from this client, broken out by Paid status and also totaled. You can press the "Refresh" button to make sure that your latest changes to this invoice are reflected in these totals.

Labor Information

┌─Labor Information───┐

Labor		Date	Description	Rate	1x	1.5x	2x	Cost	Taxes
X	2	Wed 12/9/98	Standard Day, 10 Hour	$50.00	8	2		$550.00	
X									
X									

You can select your preset labor items from the pop-up menu to automatically add them to this invoice. Each of the twelve lines has it's own pop-up menu. Each line also has a button labeled "X" which will clear the contents of that line. You can modify the contents of the line at any time, and do not have to first fill the line in with information from the **Labor** database if you do not want to.

Total Labor costs will remain updated as you add and modify information. "1x," "1.5x," and "2x" allow you to enter regular time, time and a half, and double time all within the same day. Taxes, should they be applied to the line, will be shown at the end. Note that you will have to manually enter the date for each line, even if you have filled the rest of the line in from the **Labor** database.

For more information on these labels, see the definitions from the **Labor** database on page 39.

Items Information

┌─Item Information──┐

Item		Quantity	Units	Description	Unit Cost	Cost	Taxes
X	1	1	cable	Cable, X to Y connector	$10.00	$10.00	

Items information in filled in very similarly to the Labor information. Each line has a pop-up menu from which Items can be selected. In order to clear the line, press the "X" button to the left of the pop-up menu. You can modify the information at any time, and can manually fill in lines without first choosing them from the **Items** database. Taxes, should they be applied to the line, will be added to the end.

For more information on these labels, see the definitions from the **Items** database on page 40.

Notes

Frequently you may have information that you want to attach to a specific invoice. You can enter this information is the "Notes (Public)" field. This information will be shaded and attached to the invoice following the "Grand Total." This may contain information about specific items, notes about follow up work, or information to the billing department. It is up to you how to use this field. Notice that the difference between this field and the "Footer" field is that the "Notes" field applies to only a single invoice, while the "Footer" information applies to all invoices. Also notice the difference between this field and the Client Notes field, which is not printed on invoices and is not shown to the client.

Special Items on the Navigation Bar

The following are items which have a special function inside of the "Entry" screen. These Items appear on the "Screen" Row of the Navigation bar.

Print

Selecting the "Print" screen while in the "Entry" screen will begin the invoice printing process. The program will use information from the Invoice, the Client database, and the Globals to format and output the invoice to the printer. The program does it's best to try to format the invoice into one page. It will shrink the Labor and Items list to the minimum size needed, and it will move up and shrink the Notes field. If it is unable to print the invoice out onto one page, it will output a second page with the additional information.

PrintEnvelope

A special Screen is added to the navigation bar inside of the Entry screen. This is the "PrintEnvelope." This option allows you to print an envelope for your invoice. You will also notice that if you use the "Attn:" option in the client information, this line will appear at the bottom of the address, and the client name and position will not be shown. This is to avoid confusion when sorting the mail. You client's name and position will still be printed normally on the invoice itself, however.

All about the Client Database

The Client database allows you to enter and manage your client list. This allows you to enter client information once and then automatically fill-in that information on invoices. It also keeps track of how much revenue has come from each client and how much they still owe you.

Remember, you always need to enter a client into the "Client" database before you can invoice the client.

The Client Database has the following screens:
- Browse- this screen shows all of you clients and key fields about them.
- Entry- this screen allows you to enter, modify, and view all client information.
- Print- this special screen sends either the Browse screen or the Entry screen to the printer.

Browse Screen

The browse screen shows all of your clients. Each line contains key fields about the client. These fields are:
- Client Index- the client index number generated by the database, in standard client number format.
- Description- a brief description of the client. This field is arranged by Company name, contact name, followed by title.
- Paid- the sum of all paid invoices related to this client.
- Unpaid- the sum of all unpaid invoices related to this client.
- Total- the sum of all invoices, paid and unpaid, related to this client.

The "Go" Button to the right of the Total allows you to select a client and to switch to the Entry screen with a single click. The double lined number that appears above the Grand Total header shows all revenues from all clients.

Entry Screen

The Entry screen allows you do enter, modify and view information about an individual client.

Client Index

This number is generated by the program and is in standard client index format. The number is cannot be modified. This is the number that the invoice database uses to remember which client an invoice is related to. Because this information is used instead of a name, the contact, title, address, and other information can change without harming older invoices.

Contact Name

This is the name of the person who is your contact at the company. The invoice will be mailed addressed to this person. This field is optional.

Contact Title

This is the formal title of the Contact Name. This field is also optional.

Company

This is the name of the company that is being invoiced. This field should be filled in. If the name of the company and the name of the person are the same, place the name into this field.

Address

This is the address that the invoice should be mailed to. You may use up to all three in the address field.

City, State, and Zip

These fields allow you to enter the City, State and Zip of your client. You should use these fields instead of the Address lines so that the program can format your address properly.

Attention

If this field is filled in, the name (or title or department) is added to the bottom of the address with an extra line and the text "Attn:" before it. This field is optional.

Phone (Voice) and Phone (Fax)

These are jextra places for you to track your client's phone numbers. You should fill in the Voice phone number as it may help you later when shipping overnight (FedEx requires a phone number on the shipping label). You may also choose to have your modem dial the phone number for you with the dial button. You can set up dialing preferences in the Application Preferences dialog box, under the "Edit" menu.

E-mail Adress and Web Site

You can store your client's E-mail address and Web Site in the spaces provided. Assuming that your computer is configured properly for internet access, you can use the buttons provided to open an email to the client, or to open their web site.

Mailing Address

This field is calculated by the database as you fill in the above information. This field is not modifiable, but can be selected and copied out into other programs.

Client Revenues

These fields, "Paid," "Unpaid," and "Total" show you the amount of revenue generated from this client, broken out by Paid status and also totaled. You can press the "Refresh" button to make sure that your latest changes to this invoice are reflected in these totals. You will notice that this display looks similar to the "Client Revenues" section of the Invoicing database. The only difference here is

that you can click on either "Paid," "Unpaid," or "Total" to quickly find all invoices related to this client and to browse them in the Invoices database.

Client Notes

This allows you to enter notes on items not listed elsewhere about this client. Suggested items include:
• Projects you have completed
• The client's web site
• Information about the company
• Bidding information on future projects

Invoices

All invoices which have been related to this client can be browsed on the client screen. Select fields are used from each invoice. For more information on these labels, see the definitions from the **Labor** database on page 39.

All about the Labor Database

The **Labor** database allows you to enter labor information that you can fill out invoices with a simple click. You can create a new labor record by selecting "New Labor" from the "New" menu. Notice that the Date field is missing here, since that is entered later. The fields contained in each record are:

Labor Index

This is a standard number given to the record by the database. You cannot modify this number.

Description

This is the standard description the Invoice program will use when you select this Labor record. You can modify field this at any time.

Rate

This is the standard rate that will be used when you select this Labor record. You can modify this at any time. The rate is an hourly rate.

1x, 1.5x, and 2x (The Hours)

These are the number of hours worked at different multipliers. You enter straight time under "1x," time and a half under "1.5x," and double time under "2x."

Cost

This is a running total of the cost of the Labor record, assuming the default values. This value is calculated as you modify the rate and the hours, and cannot be modified.

Revenues

This is a running total of all revenues related to this type of labor. This allows you to get an idea of where your labor revenues are being generated. If you want to track specific types of labor related to a client, a special type of work, or work over a specific time period, you should make separate labor items for each classification so that there different totals will be tracked.

All about the Items Database

The **Items** database allows you to enter items information that you can fill into invoices with a simple click. You can create a new Item record by selecting "New Item" from the "New" menu. The fields contained in each record are:

Item Index

This is a standard number given to the record by the database. You can not modify this number.

Quantity

This is the number of units that you are charging the client for. You can modify this field at any time.

Units

This is a text description of the units that are being invoiced. You can modify this field at any time

Description

This is the standard description the Invoice program will use when you select this Items record. You can modify field this at any time.

Unit Cost

The cost of one unit of this item.

Cost

This is a running total of the cost of the Labor record, assuming the default values. This value is calculated as you modify the quantity and unit cost.

Revenues

This is a running total of all revenues related to this type of item. This allows you to get an idea of where your item revenues are being generated. If you want to track specific items related to a client, a single rental item, or specific items over a time period, you should make separate items for each classification so that there different totals will be tracked.

All About Number Formats

Two number formats that you will see frequently in the program are the Invoice Number Format and the Client Number Format. They are explained below.

Invoice Number Format

The Invoice Number is used to tract each separate invoice. The number always appears in the Invoice Number Format, which is similar to the Client Number Format. The number is created at the time the record is created and cannot be modified. The number is used when relating invoices to clients and visa-versa. The Invoice number always takes the form of the letter "I" followed by a period ("."), followed by four digits. The numbers run in order, starting at 1 (shown as "0001") and counting upwards.

For example, these are all valid Invoice numbers:

- `I.0001`
- `I.1234`
- `I.3000`

Client Number Format

The Client Number is used to track each separate client. The number always appears in the Client Number Format, which is very similar to the Invoice number format. The number is created at the time the record is created, and cannot be modified. The number is used when relating clients to invoices, and visa-versa. The Client number always takes the form of the letter "C" followed by a periods ("."), followed by four digits. The numbers run in order, starting at 1 (shown as "0001") and counting upwards.

These are all valid Client numbers:

- `C.0001`
- `C.0101`
- `C.4321`

All about the "New" Menu

The "New" Menu is available from all four database, and should be used when creating new records in any of the databases. Selecting an item from the "New" menu will:

- Move you to the correct database if you are not already in it
- Put you in the correct screen for data-entry if you are not already in it
- Create a new record for you to begin entering information into.
- If you accidentally create a record you do not want, you can delete the current record in your current database by selecting "Delete…" from under the "New" menu. <u>Be careful as this can not be undone!</u>

Tips and Tricks

Importing a Logo

Aside from copying and pasting a logo into place, you can import a logo directly into the program. This keeps you from having to open the logo in a second application. It will also allow you to "link" the log, rather than importing it. Large logos sometimes cause memory problems and are best linked rather than imported.

To import, follow these directions:
- Go to the Invoices database.
- Go to the Globals screen.
- Click inside the Logo box.
- From the "File" menu, select "Import/Export…"
- From this pop-up menu, select "Import Picture"
- Select your image location.
- Choose "Link" if you want to keep the image outside of the program.
- Choose "Open."

Your image should now be imported. The image can be either PICT (Mac only), BMP (windows only), GIF (both), or JPEG (both).

Dialing Preferences

If you choose to use the "Dial" button to phone your clients, you should set up the "Dialing" preferences. These can be found by looking in the "Edit" menu for "Preferences" and opening the "Application" preferences. A pull down menu in the appearing dialog box will let have your computer recognize certain prefixes and replace them with alternate prefixes.

Faxing Blue Box Invoices

If you wish to deliver your invoices by fax, you have two choices, you can either select to print to the fax (Chooser on the Mac; Printers on Windows), or you can print a hard copy and fax it from a machine. Some fax applications that add options to the "File" menu do not function properly with Blue Box Invoices because they rely on over-riding the Print menu command.

International Concerns

International users have forwarded the following comments about the program. If there are other things that would need to change about the program in order to use it in your country, please let me know. A new international version to address these issues in the planning stage.
- A4 paper needs to be supported
- Date format needs to switch to "dd/mm/yyyy"
- Dollar sign should be customizable or removed
- Ability to customize text on Invoice

Why don't my items stay in order?

When you enter Labor and Items into the invoice with pop-up menus, the items become organized alphabetical order, not by reference number. This means that the numbers will appear out of order, but you can organize the list to appear in a logical order by naming similar items in a similar fashion (i.e., "Day Rate, Standard" and "Day Rate, Hazard").

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