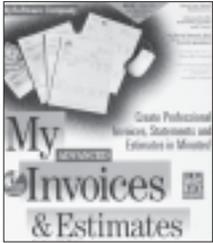


Low-Cost Invoicing and Estimating

by Craig Savage



My Advanced Invoices and Estimates 3.0 (\$59.95) requires Windows 3.1, 4 MB of RAM, and 5MB of free disk space. For more information, contact MySoftware

Co., 2197 E. Bayshore Rd., Palo Alto, CA 94303; 415/473-3600.

For everyday office work, I use the Microsoft Office Pro package, a "suite" of programs that includes Excel, Word, Access, and Powerpoint. All of the applications are "giants" in every respect, but like giants everywhere, they aren't very gentle to your computing environment. For starters, the office suite takes up more than 50 megabytes of hard disk space, and the owner's manuals occupy 8 inches on my shelf. While the individual applications are very powerful, they are at the same time very difficult to master — something like my Japanese hand planes. Even with Microsoft's helpful on-screen Wizards leading the way at each step, working with Word or Excel can be a daunting experience for the new computer user.

On top of that, I've been using Microsoft Office for more than three years and I still use only a very small fraction of its power. Most new users will likely use even less. By contrast, the Works programs such as those from Microsoft or Claris also combine spreadsheet, word-processing, database, and drawing functions, and are easier to understand and use. They cost much less, and they don't eat up hard drive space.

My Advanced Invoices

Still, while it's possible to do all of the mundane tasks that contractors require, like job costing and invoicing, with Works programs, I continue to look for programs that follow the KISS philosophy — Keep It Simple, Stupid.

One such program does just one thing, but it does it very well. MySoftware Company's slogan is "Keeping it Superbly Simple (not all kisses are alike), and the *My Advanced Invoices & Estimates* program (which I'll call MyInvoices) lives up to its billing. The software comes on just one disk, and the owner's manual is only 60 pages long — a good indication that the program doesn't try to do everything for everyone. What it does do is set up, print, and track customers, estimates, invoices, and receivables.

What goes in. When you first launch MyInvoices, you are presented with the Data Entry screen and the Register (see Figure 1). The Data Entry window handles all the details for estimates or invoices; the Register displays a sorted list of all existing invoices and estimates.

Enter client information. In MyInvoices, estimates and invoices are identical except for the title and the fact that estimates are not tracked. To begin a new estimate or invoice, click on the Customer List button and choose a customer; the customer name is automatically entered in the Bill To section of the form. If the customer name isn't on the list, as you begin to type it the program asks if you want to add a new client, then automatically

presents the Customer Information Screen for you to fill in.

Enter item information. The next step is to list the materials or services in the body of the estimate or invoice (Figure 2). First fill in the quantity, then type an item into the description field, or use the drop-down menu to pick an item. Like the customer name, if you haven't entered an item before, the program asks you if you want to add it now. Next, you enter a unit price (these are stored with the item); the total amount for the item (quantity times unit price) is figured for you. If you mark the Tax box, sales tax is added to the total.

Once an estimate or invoice is complete, you can print it on letterhead or a blank piece of paper, or on one of several professional-looking preprinted forms you can purchase from MySoftware.

Payments. Tracking invoices and payments is the last feature of the program. The Payments button brings up a screen where you enter payments, which accumulate into a complete payment history. Partial payments are carried over and the balance due is calculated automatically.

Reports. MyInvoices generates statements based on customer invoices in the file. Available reports include: Sales by Customer; The Invoice Journal; Sales by Sales Person; Outstanding Estimates; Cash Receipts; Receivables and Aging; Sales Trend; and Customer List.

In addition, the Statements function will automatically print statements based on the invoices you have entered in the current file. Customer statements reflect all unpaid, partially

paid, and overpaid invoices.

Make it work. That's it, really. The program allows minor customization of forms output, and imports customer files and item data from spreadsheets or databases. I set up the program and had an invoice out of the printer in less than 5 minutes.

MyInvoice is easy to use and understand, but that means it's also limited. So I don't want readers calling me up, saying they wish it would do such and such. If you need it to do such and such, be creative. Come up with a work-around in your spreadsheet or in Quicken. Also keep in mind that MyInvoice does not come with a database of items, nor does it offer much in the way of customizing documents. But if less is more, this program is the most. ■

Craig Savage is an associate editor of the Journal of Light Construction.

If you have a question about computing in construction, address it to State-of-the-Art Contractor, JLC, RR 2, Box 146, Richmond, VT 05477; or e-mail to 76176.2053@compuserve.com.

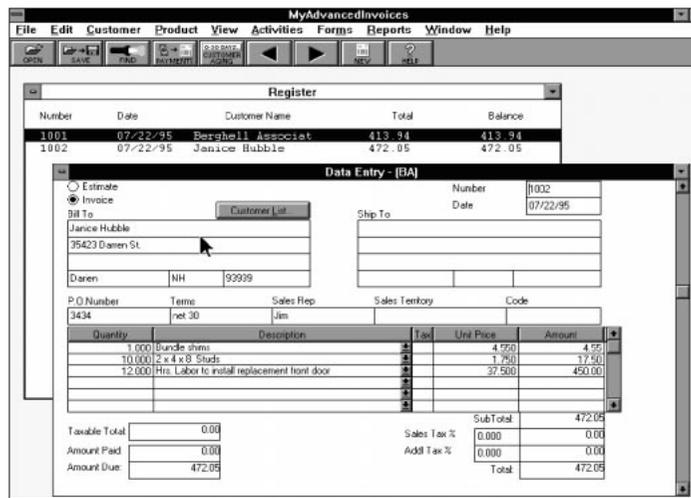


Figure 1. The Data Entry window, which holds line-item entries for both estimates and invoices, overlays the Register, which displays a list of existing estimates and invoices.

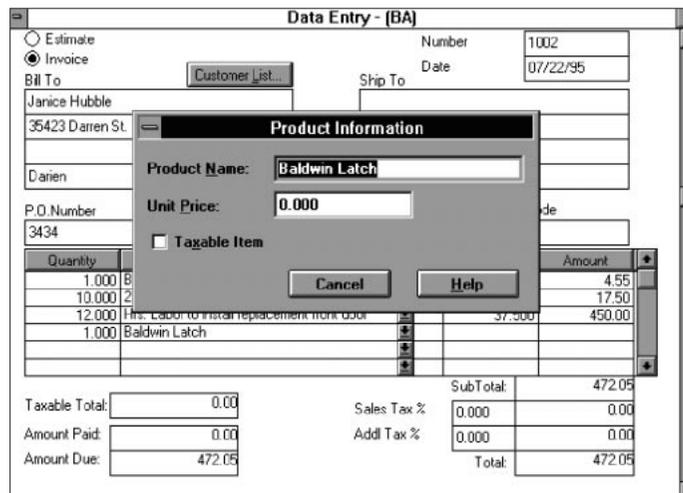


Figure 2. To create an estimate or invoice, first enter general client information, then select line items from a drop-down menu of materials and services. New items can be added to the list on the fly.