

Real Estate Management System for Microsoft EXCEL™

I designed these templates for a realtor/investor much more computer-phobic than you. As a result you may find them too easy to use. If so, I apologize.

FARMING RECORD will organize your farming activity so you can better keep track of where you have farmed, and see what activities work best in which areas.

To enter farming information, page down to the Farming Record table. Enter up to 20 street names which you farm, the number of residents on the street, and up to 5 types of mailings you send. Then when you complete a mailing, type the month in the appropriate line, and DO NOT abbreviate month names in this section. For a monthly breakdown of your farming activity, page down to the Farming Tally or callup the Farming Chart. For a breakdown by month, select Run from the Macro menu, and type "breakdown!" and the 3-letter month abbreviation given on the template. (e.g. "breakdown!JUL" for a breakdown of July's activity).

EXPENSES RECORD will keep track of your business expenses for tax purposes and will give you an organized picture of what you are investing in your Real Estate activity, so you can better analyze which expenses are giving you the most benefit.

You are given five customized categories and a catch-all miscellaneous category. Begin by choosing your five expense categories (old tax returns are a good source) and typing them into the entry box. Then when you have an expense to enter

- Page over to the journal
- Enter the date as month/date/year (e.g. 1/2/88).
- Type in the category

be sure to spell out the category exactly as you originally entered it.

note: Miscellaneous must also be completely typed out, not abbreviated as

Misc.

- Type in the amount

note: you will not need to include "\$"

- Enter any description for your own use, such as "Auto Insurance Premium" or a document reference ("Gasoline Receipt--File: May, Auto")

To view a breakdowns and totals of your expenses, open the **Totals** document. Make sure the **Expense Record** is still the active window (just click on it), then select **Run** from the **Macro** menu, and type "Totals!by_category" to see your expenses broken down by category or "Totals!by_quarter" to see a quarterly breakdown.

The password for all the templates is "shareware." You won't need it unless your planning some drastic changes, and I would advise you to save a copy of the original. As the password indicates, these templates are shareware, and here comes another of those obnoxious reminders to send in your fee.

The fee is \$25. (or more, if you too were once a struggling college student) for both templates. This also entitles you to the new and improved version #3 which will include more breakdown options on the Expense record, allowing you to view quarterly expenses by category, and individual categories of expenses by quarter --Coming soon to a bulletin board near you.

Oh yes, and my address is

Maria Lima
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I also have available a spreadsheet system for you Real Estate Investors: income property analysis, income property expense record, rent record, and more.