Blue Box Invoices Manual

Manual Version 1.2
for
Blue Box Invoices Version 1.2

6/1/99

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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. 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 send the code out right away.

Credit Cards

You can now register your copy of Blue Box invoices on the internet with most common credit cards:

Secure Server Relay: http://order.kagi.com/?S72&s
Normal Server: http://order.kagi.com/?S72

These sites are also linked to from the Blue Box web server: http://www.blueboxsw.com

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 also a 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. It has become most popular in the areas of:

- Film and Video Production
- Graphic and Web Design
- ISP Hosting
- Live Entertainment & Booking
- Photography

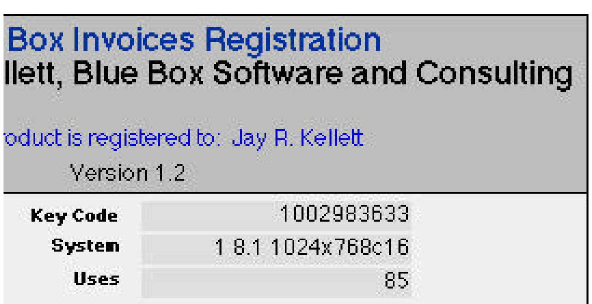
Each invoice contains information about you or your company, information about the client, and specific billing information. Invoice information is broken out into "Labor" and "Items." "Labor" relates to work done at an hourly wage, performed on a specific date. "Items" refers to anything else (usually 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.

What's New in Version 1.2?
As with version 1.1, this version has been guided by the feedback of users. 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:
- Extensive control over currency formatting for international use
- Every label of an invoice is customizable
- New "Generate" database allows for unlimited customization of invoice & envelope layout (requires FileMaker Pro and a registered program)
- New Preview feature allows invoice to be previewed or faxed (additional software required for faxing)
- Tax ID field is displayed at the top of each invoice
- Client address links directly to Yahoo! maps
- Look at client revenues from a specific year with the "Focus" features
- Generate pure text (ASCII) invoices
- E-mail text invoices directly to your client
- Print blank or partially filled invoices for on-site completion
- Item numbers and labor numbers can now be assigned by the user
- Pop-up lists sorted by number, not by name

What is this Key Code thing?
Blue Box tracks users by their Key Code. The Key Code is a ten digit number generated by your computer when you first run the software. The first six numbers of the key code are made up of the current month, day, and year. The remaining four digits are random. This number identifies you in our customer tracking database. This helps us perform customer service functions better. Also, every key code has a matching registration number that allows the program to be fully registered. This is why we always ask for the Key Code when you register the program, and also why we like to have it when performing customer support. Please always try to include your Key Code with all correspondence.



The key code can be found on the Registration Screen, which is the first screen to come up when you register the program. You can also go back to the Registration Screen by using the layout pop-up on the left side of the screen. The Key Code is the first of the set of numbers shown on the right.

Upgrading from Version 1.1?
To upgrade from Blue Box Invoices 1.1 to version 1.2, follow the following instructions in order. Version 1.2 will import your data from version 1.1 without touching the original application.

Before starting:
1) Read all of the directions before starting. If you are unsure about any step, get some help before proceeding.
2) Before you upgrade, backup your data to a safe place.
3) Open Blue Box Invoices 1.1 (called " Blue Box Invoices 1.1") and close it. This will make sure all of the records are found and ready for import.
4) Place the "Blue Box Invoices 1.2" folder on your hard drive *next* to the "Blue Box Invoices" folder. Do not place it inside of the folder. In other words, "Blue Box Invoices 1.1" sits inside of "Applications," then "Blue Box Invoices 1.2" should also sit inside "Applications."

Upgrading:
1) Open the "Blue Box Invoices 1.2" application.
2) Press the "Upgrading from 1.1?" button.
3) Find the "Import 1.1 Data" section.
4) Press the first button, labeled "Import Labor." If you are prompted to find a file, you should point to "Labor11.BBI" in the "Blue Box Invoices" folder. Do NOT point to "Labor12.BBI" in the "Blue Box Invoices 1.2" folder.
5) Continue importing Items, Clients, and Invoices.
6) When you are done, you should see all of your previous invoices imported inside of the database.

After:
1) Once you have verified that the invoices and related data were imported, you should remove the folder "Blue Box Invoices," or move it to where you will not confuse the old program with the new one. Make sure that you have backup up your data before removing the old folder in case you need to restore information from it.
2) If there is any propblem with the import, such as your registration information not copying over, please contact Blue Box for assistance. Please be sure to include the “Key Code” for this copy, and also for the previous copy, of the program.

How it works

About the Databases

Blue Box Invoice is made up of five databases that work together to track invoice information. These databases are called **Invoices**, **Clients**, **Labor**, **Items,** and **Generate** (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.

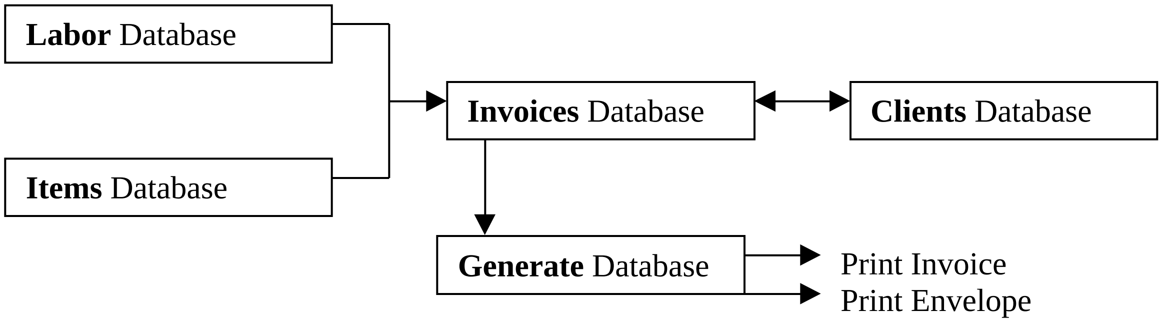
"Items" Database

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.

"Generate" Database

This database allows you to generate printed invoices and envelopes.

How They Work Together



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, create 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 **Generate** 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 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 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.

Note: There is a persistent rumor that the aforementioned Buffet and Buffett are related somehow. While this might be true, I never seen any proof or acknowledgement from either party. If anyone out there can set this rumor straight in one direction or the other, please let me know.

Common Database Terms

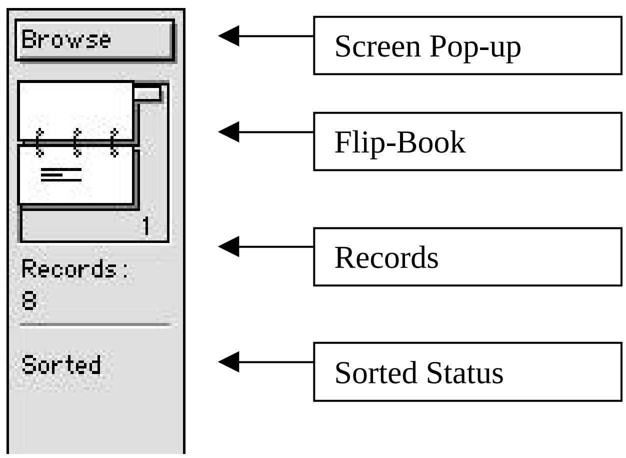
Below is a listing of common database terms that you should be familiar with. Refer back to this list if you are unsure what the term means when you encounter it in this manual.

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 complement 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 whether 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 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 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 cannot 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
- 4 megs of free hard drive space
- Power-PC or 68k friendly

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
- 4 megs of free hard drive space
- Windows '95 formatted volume (long filenames)

Set-up Instructions

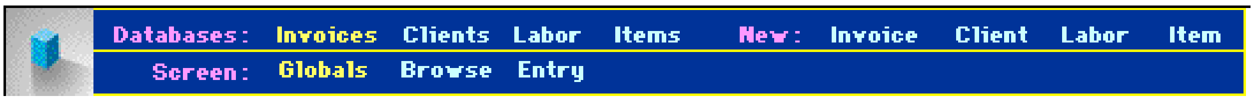
- From the Blue Box web site (**`www.blueboxsw.com`**), download "BBI-11.zip".
- Expand this file with Win-Zip (available at **`www.winzip.com`**).
- You should now have a folder called "Blue Box Invoices 1.1" on your hard drive.

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's 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.

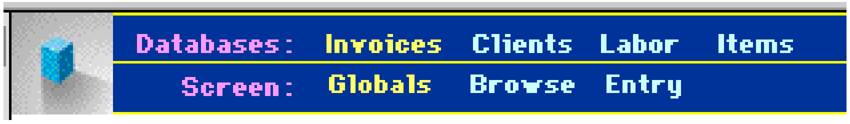
On the right of the first row of the control bar are the "New" commands. These replicate commands in the "New" menu. They can be used from any database to create a new record in any database, including the one you are in currently.

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 fourth screen for printing (this screen is used only for printing).

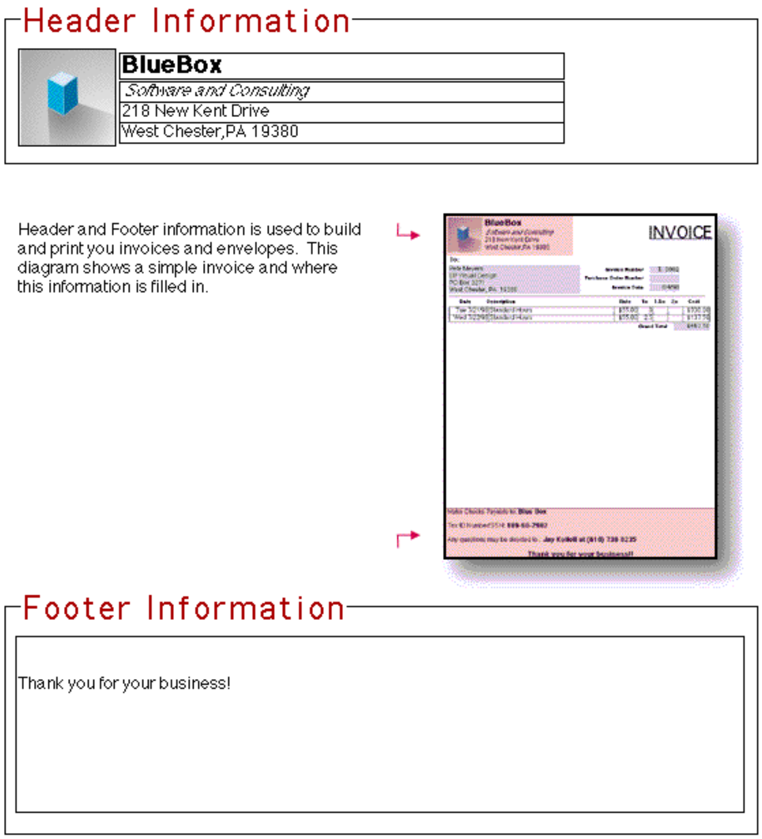
Other special commands include "PrintEnvelope" and "Find" commands that come up only on specific screens. You can find more information on these commands in the "Reference" section.

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.



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.



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 following these steps:

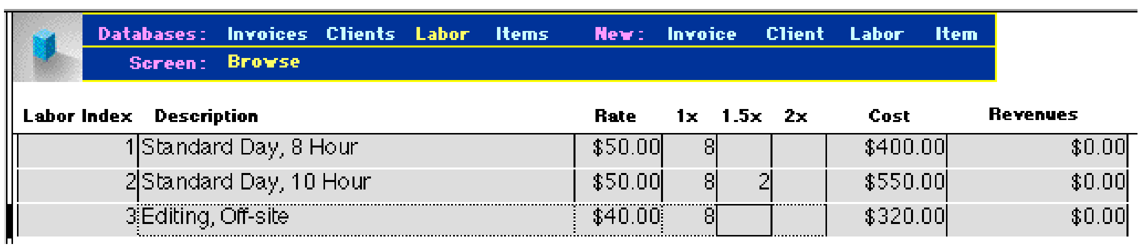
- Copy a new logo from another source (scrapbook, etc).
- Select the box containing the logo on the "Globals" screen by clicking on it once.
- Select Paste from the edit menu.
- Your new logo should appear in the box.

You may also set up tax defaults from the Globals screen. For more information on the Globals screen, refer to the reference on page 25.

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.



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 42.

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.

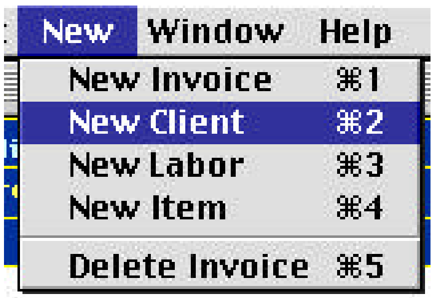
Item Index	Quantity	Units	Description	Unit Cost	Cost	Revenues
1	1	cable	Cable, X to Y connector	$10.00	$10.00	$10.00

For more information on the **Items** database, refer to the reference on page 43.

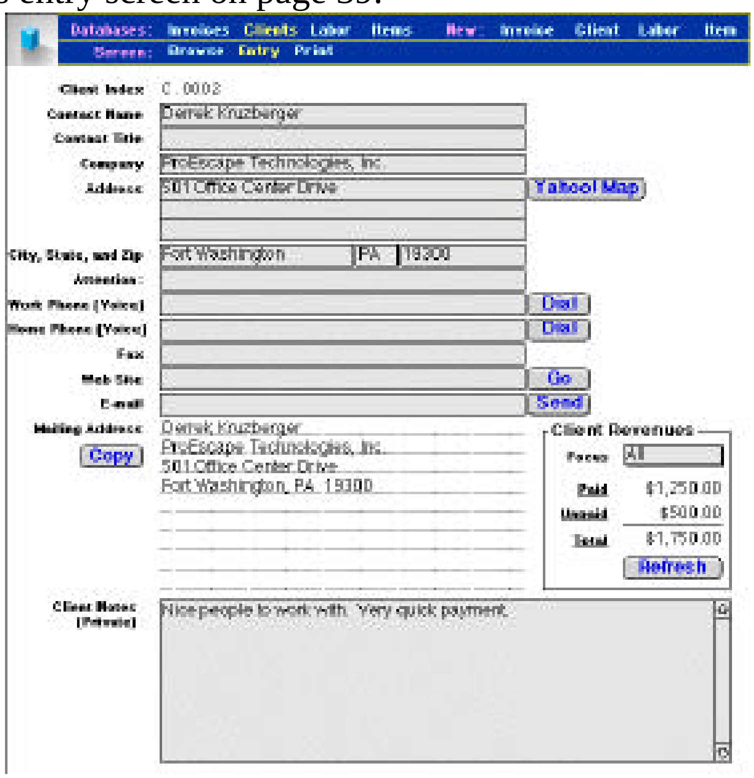
Entering the First Client

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

Select “New Client” from the “New” menu.



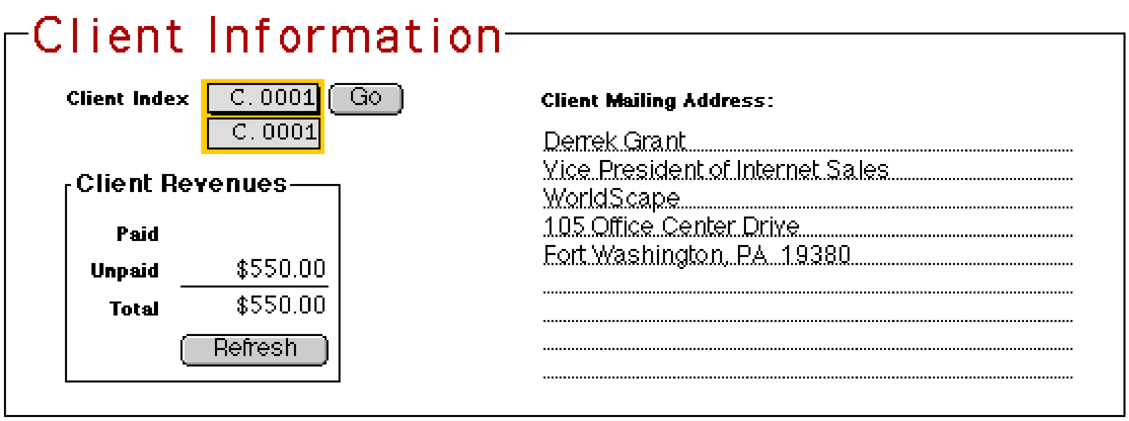
For now, all you have to worry about is the contact information. For more information, refer to the Client database reference starting on page 38 or the reference for this entry screen on page 39.



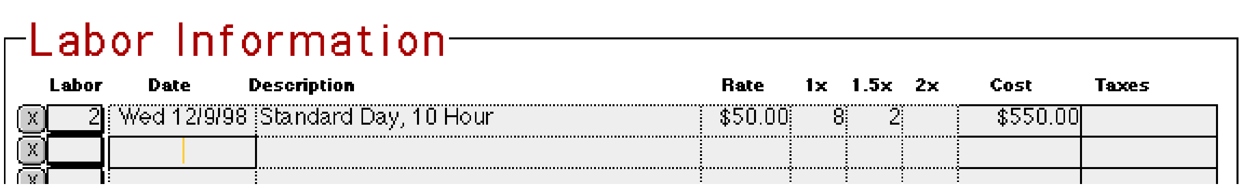
Entering the First Invoice

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

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.



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.



Print Your Invoice

Now that you have entered the information, you will have to generate the invoice so that you can send it to your client. You do this by selecting "Invoice" from the "Generate" row of 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. Both the Print Set-Up and the Print dialog boxes appear. 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 "Envelope" screen from the "Generate" row of 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. Again the Print Setup and the Print dialog boxes appear. You may have to change your settings in the print dialog box to "manual feed" to print correctly on the envelope. All printers seem to handle this slightly differently. 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.

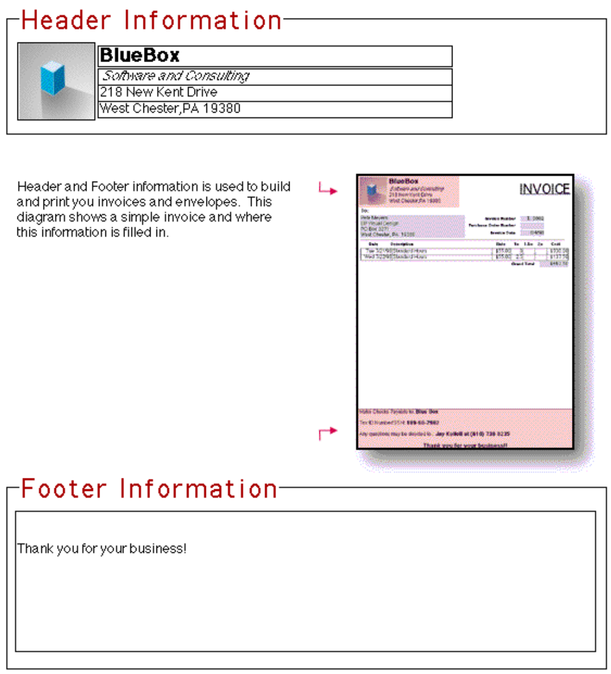
All about the Invoice Database

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. This is also where you print invoices and other output.

Globals Screen



Each invoice that is printed has certain information that stays the same for each invoice (e.g., your company name, address, payment instructions) 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 always identical for all 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

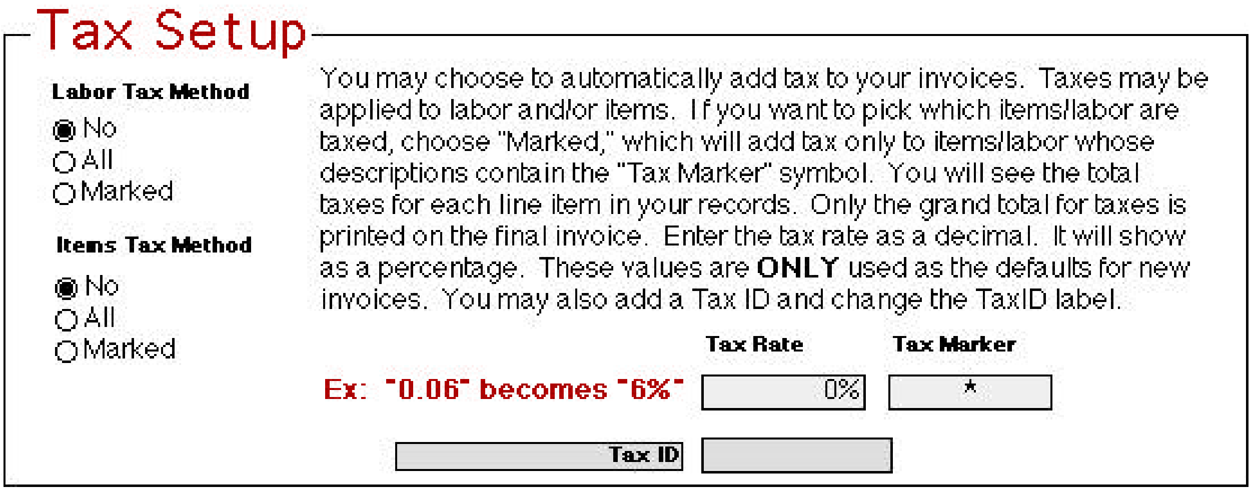
The boxes to the right of the logo allow you to enter your company name and address. If you don't need the extra line at the bottom, it is a nice idea to add your phone number, too. The first of the four lines is slightly larger and is bolded by default. You can change the styles and the fonts within 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 text box in which you can add any sort of information that will be useful to people receiving your invoice. Suggestions include:

- Directions on whom to make payable on the check.
- Whom to direct questions to, and the number to call.
- Your standard payment terms.
- A "Thank-You" for doing business with you.

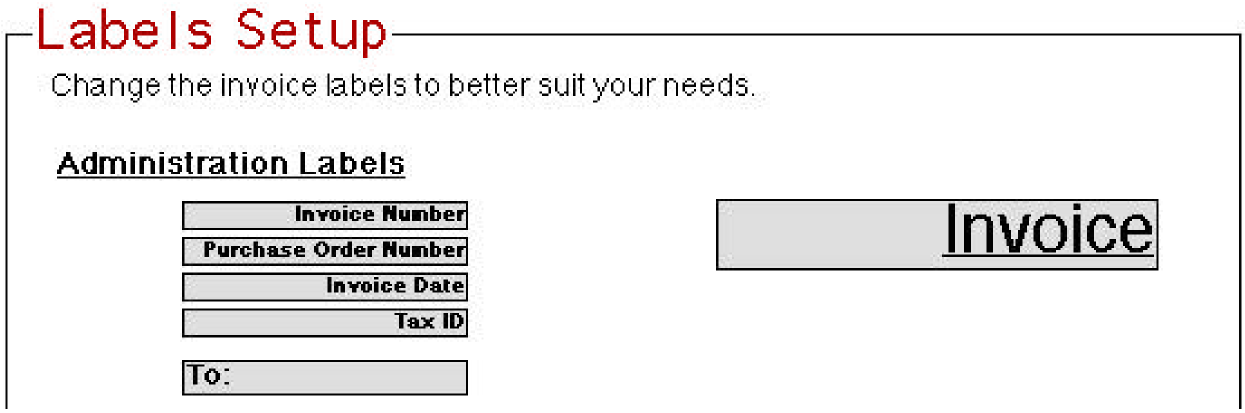
Tax Defaults



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 four items you should set when setting up your tax defaults:

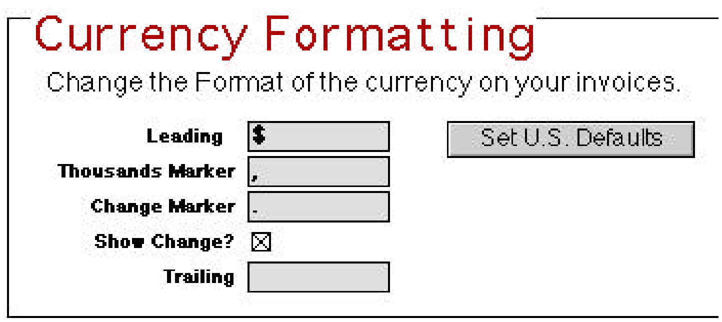
- <u>Labor Tax Method</u>—This tells how taxes should be applied to labor items. “No” means that no items are taxed. “All” means that all labor items are taxed. “Marked” means that only items whose descriptions contain the “Tax Marker” are taxed.
- <u>Items Tax Method</u>— This tells how taxes should 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.
- <u>Tax Rate</u>—This is the rate at which to tax labor and items. A single invoice can have only one tax rate, but several invoices can have several different rates.
- <u>Tax Marker</u>—This is used only 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.
- <u>Tax ID</u> – This is both a label and a tax ID that appears on all invoices

Labels Setup



This section allows you to change every label on the invoice. This can come in handy for customizing the invoices for a particular industry or country. Note that the information describing taxes can not be directly customized, since it is generated for each invoice. If you need to translate this information to another language, disable it by setting the pereference under Miscelaneous Settings.

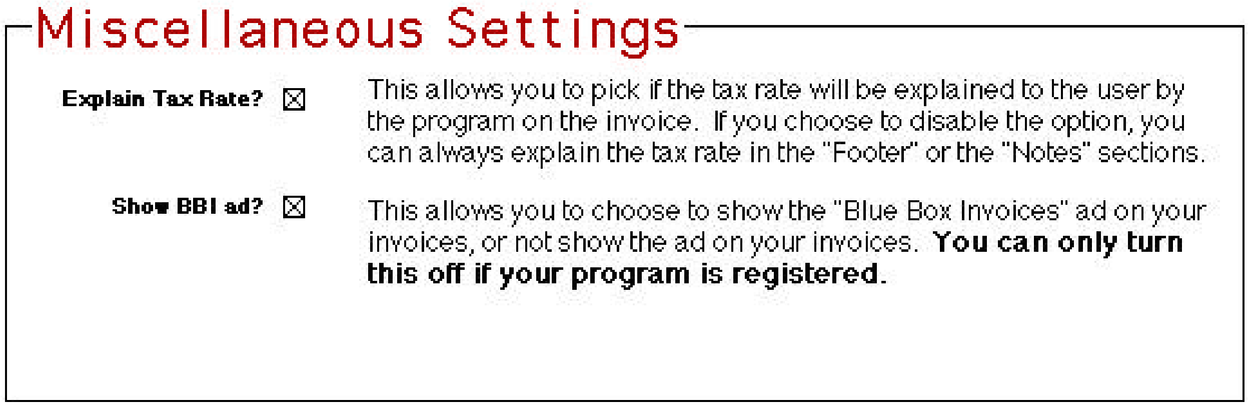
Currency Formatting



This section allows you to format the currency for a particular country. Only one set of setting is allowed at a time. The following fields effect currecy:

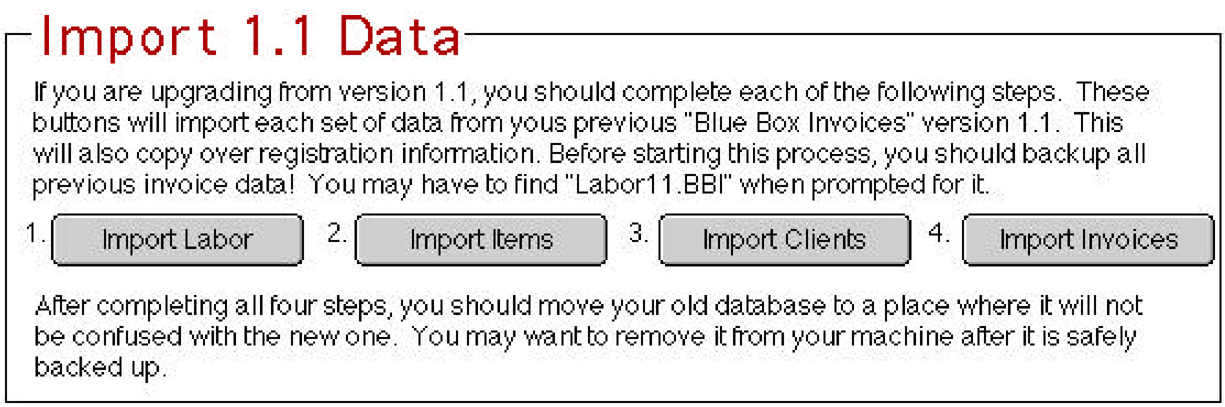
- Leading – This is the text or symbol that precedes the currency
- Thousands Marker – This is used to sepreate the thousands
- Change marker – This seperates the change from the whole numbers
- Show Change – This designates whether the change should be shown at all. Some countries do not show change as a custom, and some industries do not show change due to the large amounts used.
- Trailing – This is the text or symbol that trails the currency.

Miscellaneous Settings



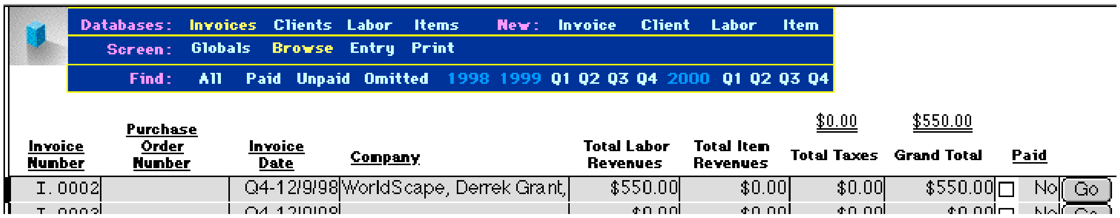
- Explain Tax Rate? – This allows you to pick if the tax rate will be explained to the user by the program on the invoice. If you choose to disable the option, you can always explain the tax rate in the "Footer" or the "Notes" sections.
- Show BBI ad? - This allows you to choose to show the "Blue Box Invoices" ad on your invoices, or not show the ad on your invoices. **You can only turn this off if your program is registered.**

Import 11 Data



This section allows you to upgrade your data from a previous version of BBI. You should import old data before creating new records. For a step-by-step procedure, see page 7.

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. Secret trick: Hold down the Option key to omit a record from views, or hold down the Command key to go directly to the related company.

The Find Navigation

Unique to this screen is the "Find" items that appears 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:

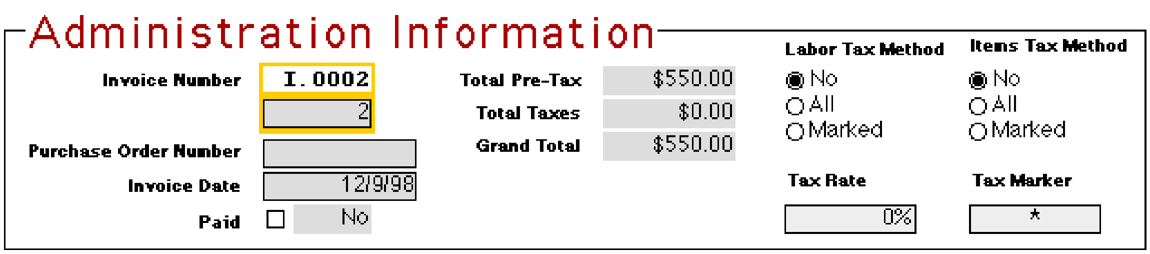
- All- This finds all invoices in the system. Frequently you will want to perform this following another find.
- Paid- This finds all of your invoices that have been paid
- Unpaid- This finds all of your invoices that have not been paid.
- Omitted- This shows all of the invoices that were hidden as a 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:

- Administration Information
- Client Information
- Labor information
- Item Information
- Notes

Administration Information



Administration information is information which relates to the processing and categorization of the invoice. Fields of information are:

Invoice number

This is the serial number given to this invoice. This number is in the standard Invoice format. The number shows 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

This number is the same as the number of the purchase order from your client. This number is modifiable and is also optional.

Invoice Date

This reflects the date that your client was billed. 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

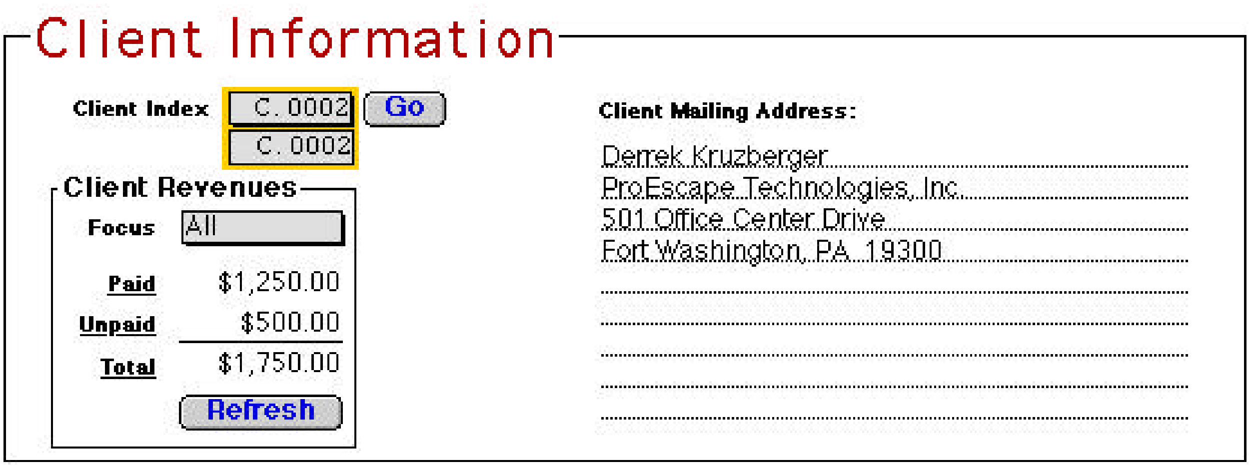
Labor Tax Method, Items Tax Method, Tax Rate, and Tax Marker determine how taxes are applied to this invoice. For more information, see Tax Defaults on page 27.

InvDate=Today

This button places the current date into the Invoice Date field. This is a handy way to update the date before printing an invoice.

Client Information

These fields contain information related to the client being billed. 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.

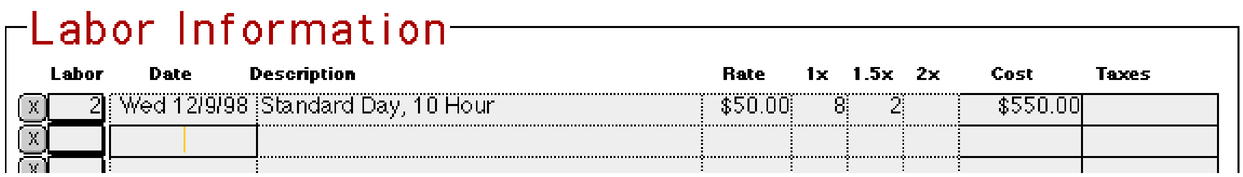
Client Mailing Address

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

The 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. The “Focus” field gives you a pop-up that allows the focusing on onto one year, or on all years. note that when you use this figure, some invoices will not be included in the totals shown.

Labor Information

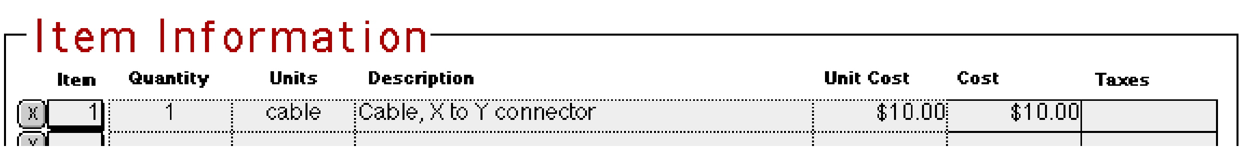


You can select your preset labor items from the pop-up menu to add them automatically to this invoice. Each of the ten lines has its own pop-up menu. Each line also has a button labeled “X” which will clear the contents of that line. You can modify the contents of the line at any time and do not first have to 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 enter the date manually 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 42.

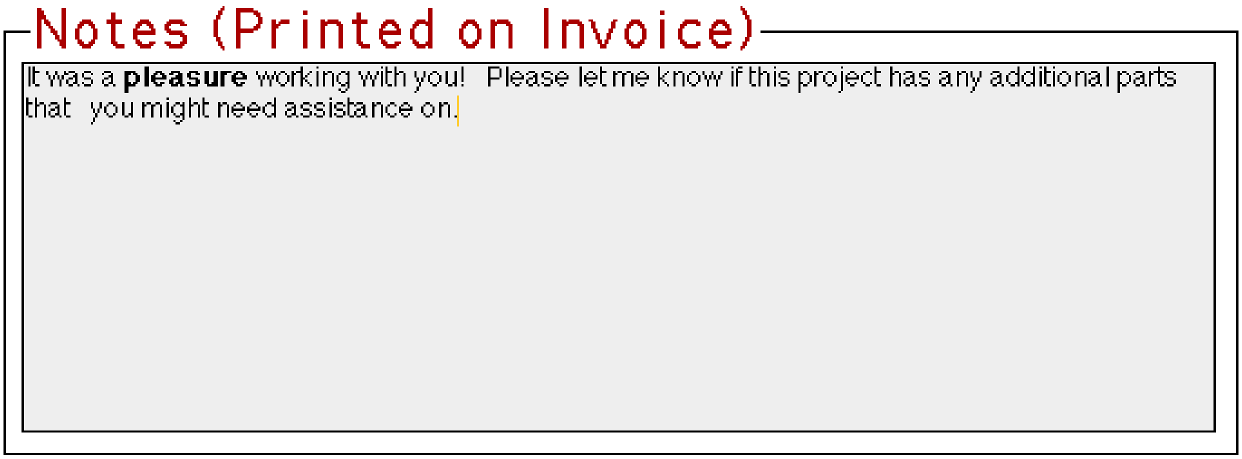
Item Information



Item information in filled in very similarly to the way in which the Labor information is entered. 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 at the end.

For more information on these labels, see the definitions from the **Items** database on page 43.

Notes



Frequently you may have information that you want to attach to a specific invoice. You can enter this information in 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.

Generate Menu on the Control Bar

The following are items appear in the Generate row of the Control bar only on this screen.

Invoice

Selecting the “Invoice” generates an invoice from the available information. The program will use information from the Invoice, the Client database, the Globals, and the Generate database to format and output the invoice to the printer. The program does its best to fit 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 on a single page, it will output a second page with the additional information.

Envelope

This option allows you to generate 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.

Preview

This option allows you to preview an invoice before it is printed. Be kind to our trees by making a habit of previewing your invoices before printing them.

Text

This option generates an ASCII text invoice. Notice that when this is done there is frequently a “clipping” that happens to the some descriptions. Make sure that if this happens nothing important is left out of the invoice. The text generated is best viewed in a “monospaced” font, such as Courier or New Courier. The formula for this field can be found in the **Generate** database, which can be opened and altered once the program is altered.

Email

This option used the text file generated from the previous option and emails it to the email address listed for the related client.

Blank

This option prints an invoice with extra blank lines and without totals. This is ideal if you are planning on taking the invoice to a client site for completion, and do not know all of the details of the job before leaving.

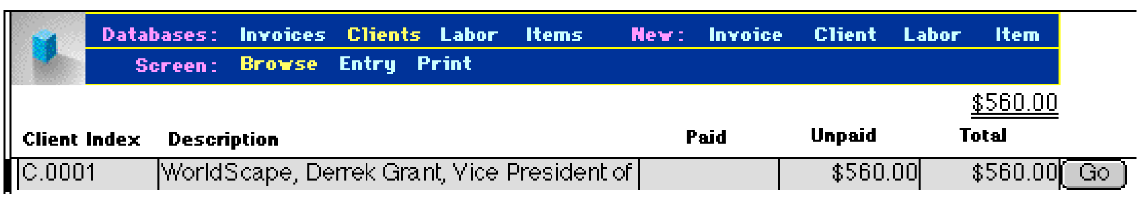
All about the Client Database
The Client database allows you to enter and manage your client list. This allows you to enter client information once and then automatically fill in that information on invoices. It also keeps track of how much revenue has come from each client and how much each client still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

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

The Client Database has the following screens:

- <u>Browse</u>- this screen shows all of your clients and key fields about them.
- <u>Entry</u>- this screen allows you to enter, modify, and view all client information.
- <u>Print</u>- this special screen sends either the Browse screen or the Entry screen to the printer.

Browse Screen

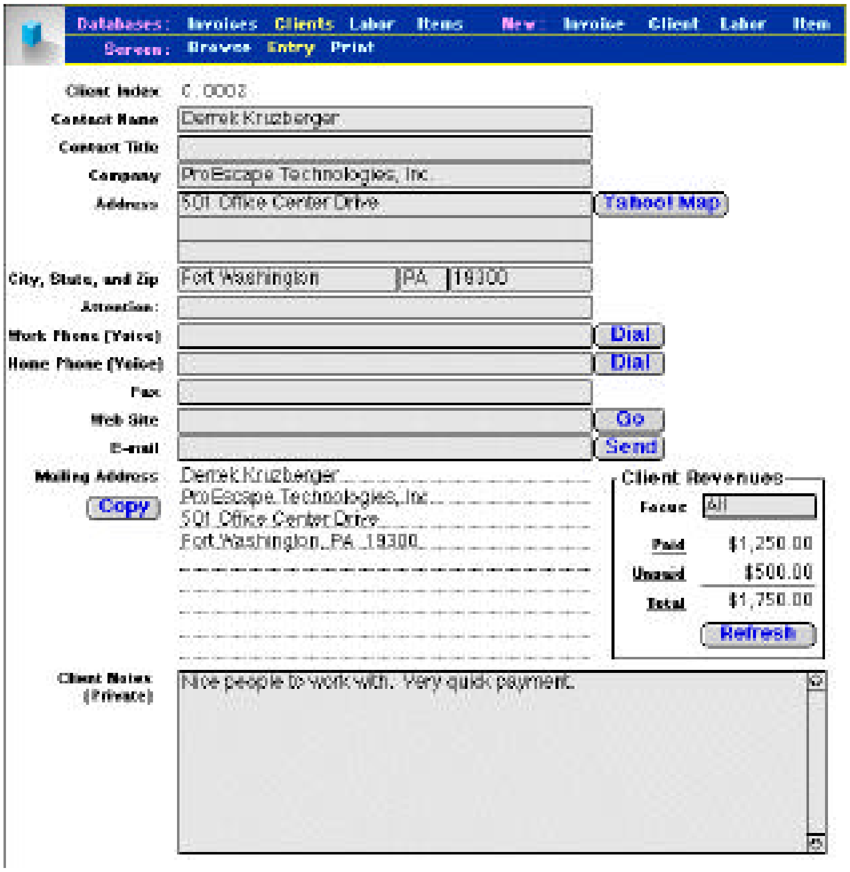


The browse screen shows all of your clients. Each line contains key fields about a client. These fields are:

- <u>Client Index</u>- the client index number generated by the database, in standard client number format.
- <u>Description</u>- a brief description of the client. This field is arranged by company name, contact name, followed by title.
- <u>Paid</u>- the sum of all paid invoices related to this client.
- <u>Unpaid</u>- the sum of all unpaid invoices related to this client.
- <u>Total</u>- 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 to 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 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 billed. 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 Code of your client. You should use these fields instead of the Address lines so that the program can format the address properly. You can also click on the "Yahoo! Maps" button to find an on-line map to your client's location.

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.

Work Phone (Voice), Home Phone (Voice), and Fax

These are extra places for you to track your client's phone numbers. You should fill in the Voice phone number because 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 voice phone numbers for you with the dial button. You can set up dialing preferences in the Application Preferences dialog box, under the "Edit" menu.

E-mail Address 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 the client's web site. This is also the email address used when sending text invoices.

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 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 "Paid," "Unpaid," or "Total" to find quickly all invoices related to this client and to browse them in the Invoices database. The Focus feature allows you to pick single years for which to show totals, rather than all invoices.

Client Notes

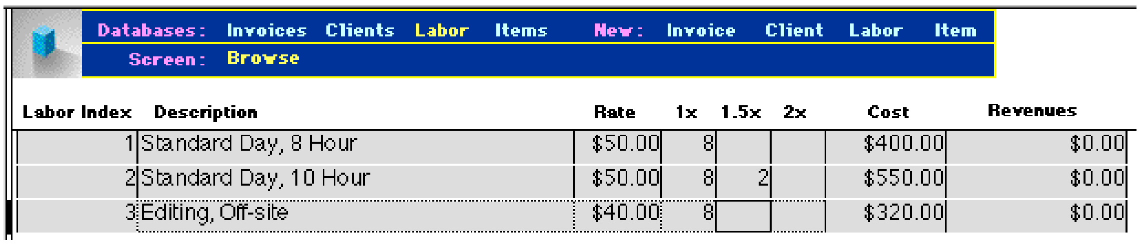
This allows you to enter notes on items not listed elsewhere about this client. Suggested items include:

- 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 42.

All about the Labor Database



The **Labor** database allows you to enter labor information that you can fill into 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 their 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 cannot 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

This is 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 their 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 track 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 vise-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 for creating links between clients and invoices, and vice-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
- Let you delete the current record in the current database. <u>Be careful as this cannot be undone!</u>

Tips, Tricks, and Frequently Asked Questions

Importing a Logo

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

Faxing can now be done from the Preview window, as long as there is the correct faxing software on your machine (any software that fakes the printer drivers should work). In some cases you will have to enter the Chooser before or after faxing. See your fax manual for more information.

Generate Database Swapping

The Generate database stores no data. It stores only the layouts for printing and the formula for creating the text version of the invoice. You can modify the layouts and the formulas if you have a registered version of the program and FileMaker Pro. You can download a 30-day trial of FileMaker Pro from www.filemaker.com. You can swap out different versions of this data without effecting the data within the program.

What are the different versions?

Starting with Blue Box Invoices 1.2 the four versions of the program now cover Mac (2 of them) and PC (the other two of them). One Mac and one PC version is for users who have FileMaker Pro, and the others are for users who do not. This is a different breakdown than before, when there were International and Domenstic versions on the program. See below for why there is no longer a need for the International Version. If you have FileMaker Pro Version 4, the advantages of the FM version are:

- Smaller file size
- Quicker download
- No run-time needed to be loaded into memory
- Easier to modify the layouts

What happened to the International Version?

Changes of the International Version were incorporated into the "base" version starting with BBI 1.2. There is no longer a need for a different version. Issues are resolved in the following manner:

- Dates – All dates are now "standard" dates fields, which allows FileMaker to use the standard fields. When you first open the program, FileMaker will ask if you want to use the System Preferences; you should say yes.
- Currency – A more advanced currency formatting system has been incorporated into this version than ever existed in the International version.
- Labels – Since all labels are modifiable, they can be customized for local languages & laws.
- Tax ID – More important in non-US countries, the program now stores Tax ID and displays it at the top of the invoice.
- Paper size – Print Setup is now available whenever anything is printed. The user can now choose Letter, A4, or whatever size they want to.
- Layout – An international version of Generate is available, which slims the fields slightly so that an invoice will fit onto A4 paper. With a registered version and FileMaker Pro, you can customize the layout even further to fit country standards.

What do invoices look like?

Fear and Loathing, Inc.
"When the going gets weird, the weird turn pro..."
Athens, GA

INVOICE

To:
Raoul Duke
President
Fear and Loathing, Inc.
1500

Invoice Number: 1.0028
Purchase Order Number:
Invoice Date: 3/8/99

Date	Description	Rate	1x	1.5x	2x	Cost
Tue 4/23/74	Travel Day-Fort Lauderdale	$50.00	10			$500.00
Wed 4/24/74	Travel Day-Key West	$50.00	10			$500.00
Thu 4/25/74	Travel Day-Cuba	$50.00	10			$500.00
Fri 4/26/74	Travel Day-Cozumel	$50.00	10			$500.00
Sat 4/27/74	Reporting-Boating	$50.00	10			$500.00
Sun 4/28/74	Reporting-Hazard Pay/Sharks	$50.00			10	$1,000.00
Sat 5/18/74	Writing-Finish	$50.00	8			$400.00

Total Labor Costs: $3,900.00

Quantity	Units	Description	Unit Cost	Cost
4	days	Rental car, pink, convertable	$35.00	$140.00
1	gear	Full scuba outfit	$120.00	$120.00
19	days	Decomression Chamber	$160.00	$3,040.00
1	chain	18-kt.-gold chain	$120.00	$120.00
4	Gallons	6-12 Insect Repellent	$2.00	$8.00
1	glass	Broken Windshield, repaired	$40.00	$40.00
5	crates	Assortes citrus and fruits	$80.00	$400.00

Total Item Costs: $3,868.00
Total Pre-Tax: $7,768.00
Total Taxes: $0.00
Grand Total: **$7,768.00**

Thank you for your business!!

Credits

Concept	Chris Kellett Jay Kellett
Programming	Jay Kellett
Manual	Jay Kellett
Manual Editor	Nick Velharticky
Quality Testing	Chris Kellett Tracy Daniels
Publicity Coach	Tracy Daniels
Script Supervisor	Sonja Klimuk

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