

|| Signs & Times User Manual

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Introduction

Thank you for purchasing your copy of Signs & Times! We appreciate your business and wish to reciprocate by providing excellent products and service. We strive to meet specific business needs of specific industries. With our experience in operations management, software development and signing, we have created an invaluable tool for you to increase your business profitability. Our primary design goals are:

Easy to Use – We want you to be busy using Signs & Times, not busy trying to figure it out...

Fully Functional – We want to provide you with all the features you need to get the job done quickly and accurately.

Affordable – We're competitive just like you. We choose to offer full-feature software for less.

If we've done our homework right, you'll be a loyal customer. Loyal customers are the binder to a solid business foundation.

One last note, like your business, ours is dynamic, too. Signs & Times, while robust, will always improve. We want to hear your input regarding new ideas, likes & dislikes. We want to be your partner in improving profitability. We want you to be our partner in continuous improvement!

System Requirements

Pentium III or better

10 MB hard disk space

Microsoft Windows 2000 or XP operating systems

Microsoft Access 2000 or newer (you may also use runtime version)

Installation

Standard

Insert CD into your CD drive.

Using Windows Explorer, browse to the root directory on your CD drive.

Double-click on the SignsNTimes.exe file.


The files will self-install to your C: drive.

Double-click the Signs & Times icon on your desktop.

MS Access Run Time Version

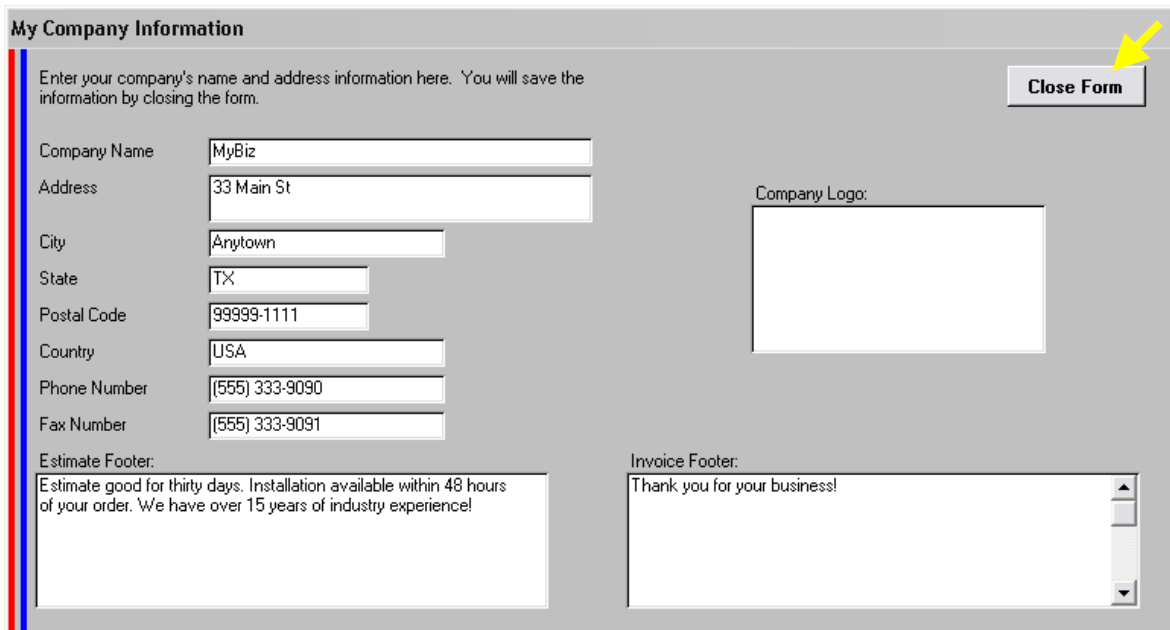
If you don't have MS Access 2000 or newer included in your Office Suite, you can still use Signs & Times by installing the free distribution of the runtime version. For installation, read the instructions found in the /runtime directory on this CD.

Startup

1. Double-click the Signs & Times icon on your desktop.  Signs & Times.Ink
2. Page through the End User License Agreement. If you accept the EULA terms, click *ACCEPT*.
3. Enter your license activation key. The activation key is case-sensitive so use upper and lower-case letters exactly as provided.

My Company Information

The first step in using Signs & Times is to enter your company information. Please enter all of the fields as completely as possible. Enter the information as you would like it to appear on your estimates and invoices. Click on the *Close Form* button to save your information.



My Company Information

Enter your company's name and address information here. You will save the information by closing the form.

Company Name: MyBiz

Address: 33 Main St

City: Anytown

State: TX

Postal Code: 99999-1111

Country: USA

Phone Number: (555) 333-9090

Fax Number: (555) 333-9091

Company Logo:

Estimate Footer: Estimate good for thirty days. Installation available within 48 hours of your order. We have over 15 years of industry experience!

Invoice Footer: Thank you for your business!

Close Form

Estimate Footer and Invoice Footer

You can customize your estimates and invoices by including additional information in the footer section of the forms. Policies, terms, expirations and other standard disclosures are useful here.

Company Logo

You can “drag and drop” or “copy and paste” your company logo (.jpg or .bmp) into this field to display on your estimates and invoices. For best results, size the logo to 1” x 2” or smaller.

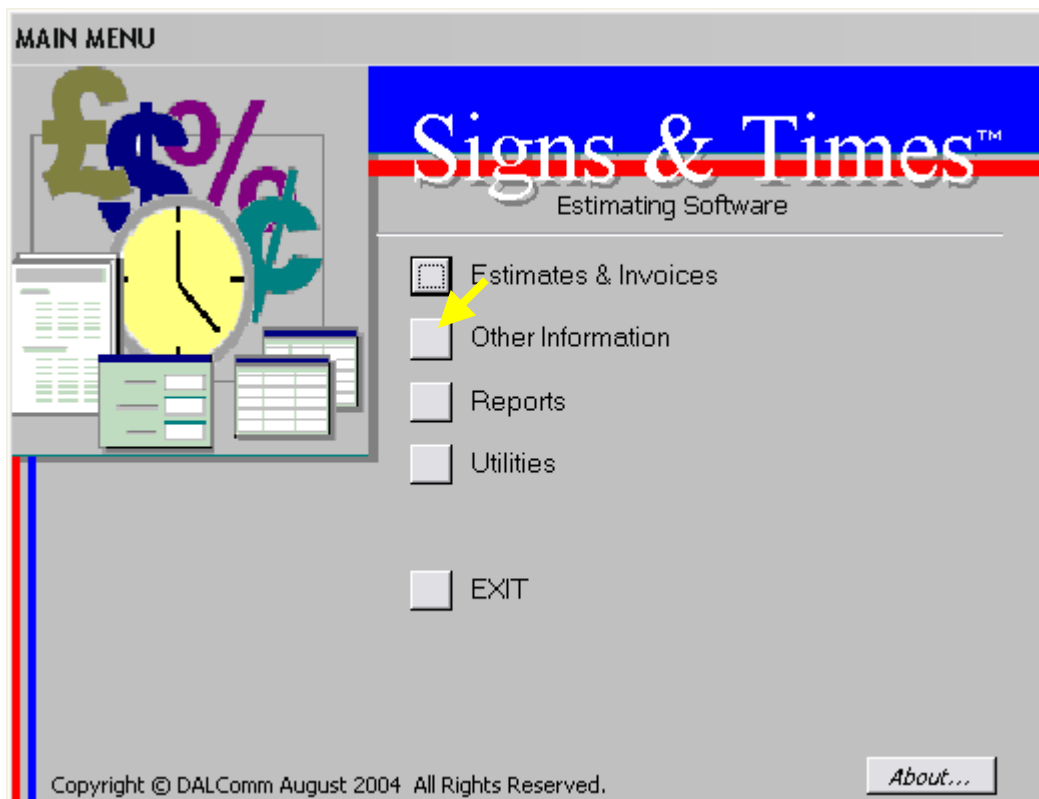
Setup/Other Information

Before you create estimates or invoices, you’ll need to setup some information about your products, equipment, consumables, customers and employees. By investing a little time up front, you’ll find you can quickly and accurately figure your costing. The first step in creating profits is understanding your costs!

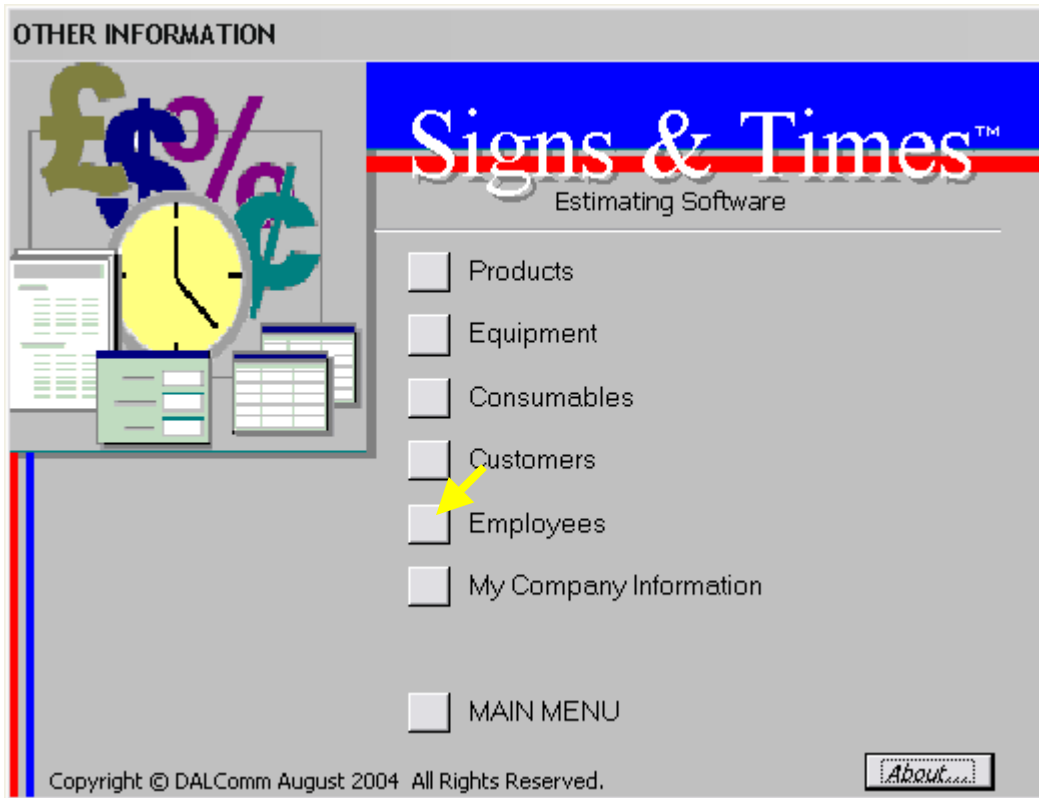
Please setup your information in the order presented on the next few pages. This will help fill in all of the pull-down lists for when you do your product costing.

Main Menu

Click on the *Other Information* Button in the Main Menu.



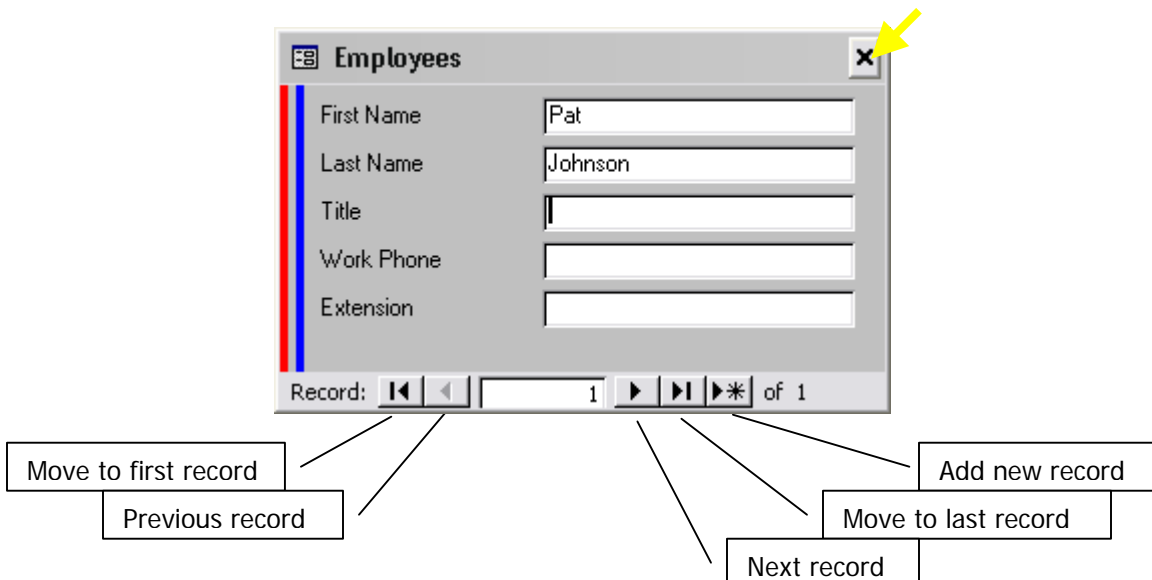
Click on the *Employees* button in Other Information.



Employees

Enter information for each employees involved in sales. This information can be used to track sales by employee. You may click on the record navigation bar to move up and down through your employee records or to add a new employee.

Click on the X button in the upper right-hand corner to save and close.



Customers

Click on the *Customers* button in Other Information. Fill in information about your customers as completely as possible.

Payment Terms might be 2% 10 Net 30, meaning that you're offering a discount incentive of 2% of the invoice if they pay in full within 10 days. Otherwise, it is due in full in 30 days. Or you may request payment in full as services are rendered. You can specify different terms for different customers according to their credit worthiness.

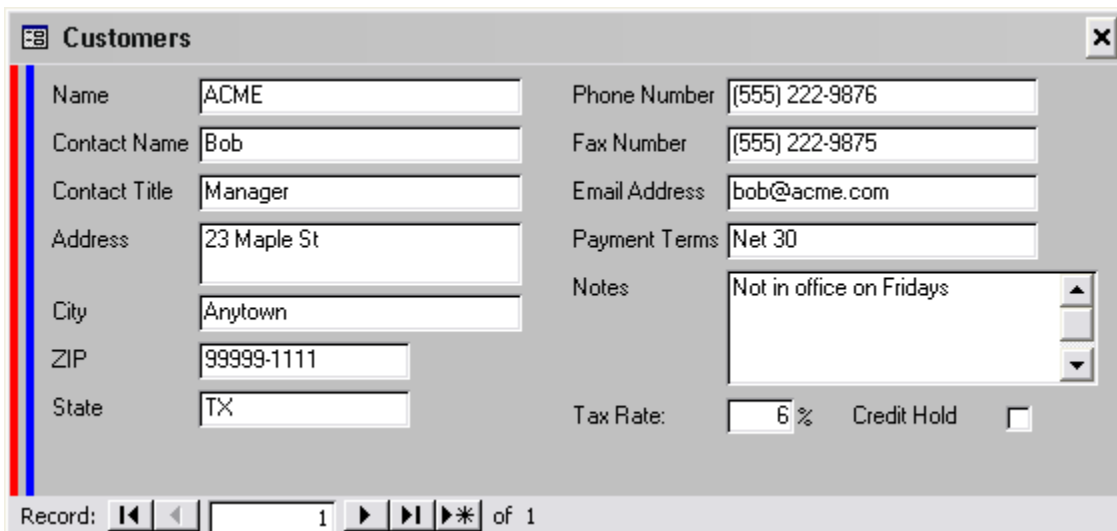
Notes are simply that. They are not printed on estimates or invoices but can be useful reminders as you create new estimates.

Tax Rate must be accurate for each customer. If the customer is tax-exempt, enter 0%.

Credit Hold should be checked when the customer cannot be offered further credit. It can be used as a flag to alert you prior to creating new estimates.

Record navigation bar works the same in every screen. Please refer to the Employees section of this user manual for a description of the button functions.

Click on the X button in the upper right-hand corner to save and close.



The screenshot shows a software window titled "Customers" with a close button (X) in the top right corner. The form contains the following fields and values:

Name	ACME	Phone Number	(555) 222-9876
Contact Name	Bob	Fax Number	(555) 222-9875
Contact Title	Manager	Email Address	bob@acme.com
Address	23 Maple St	Payment Terms	Net 30
City	Anytown	Notes	Not in office on Fridays
ZIP	99999-1111	Tax Rate:	6 %
State	TX	Credit Hold	<input type="checkbox"/>

At the bottom of the window, there is a record navigation bar showing "Record: 1 of 1" with navigation icons for first, previous, next, and last records.

Consumables

Click on the *Consumables* button in Other Information. Fill in information about your consumables. This information will be used to calculate product costing.

Consumables are items you use in creating your finished product but are not part of the finished product. Examples of consumables are cutting blades, masking, gloves, cleaning agents, tape, adhesives, etc.

Consumable costs are based on basic units of measurement like "square foot" and "inch". These are variable costs that increase as your project increases in size or quantity as opposed to fixed costs (also known as overhead).

Fixed costs include such things as utilities, rent, indirect labor, etc. Fixed costs are not addressed in this software. You should cover fixed costs with appropriate product margins and volume discussed in appendix A.

Record navigation bar works the same in every screen. Please refer to the Employees section of this user manual for a description of the button functions.

Click on the X button in the upper right-hand corner to save and close.

Consumable Description	Standard Cost	Unit Of Measurement
Cutting Blade	\$0.03	Foot
Gloves	\$0.80	Each
	\$0.00	

Record: 1 of 2

Equipment

Click on the *Equipment* button in Other Information. Fill in information about your equipment. This information will be used to calculate product costing.

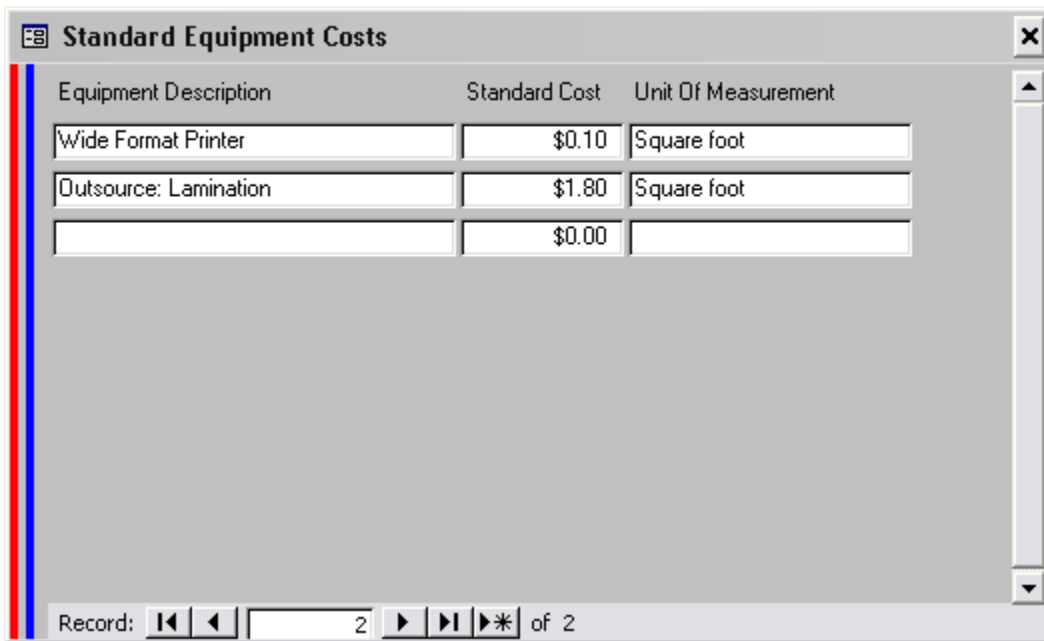
There is always cost of equipment in doing business unless you're purely in the service industry. Whether it's the cost of a lease or depreciating your purchase, we recommend charging for the maintenance and eventual replacement of your equipment.

Use a unit of measurement appropriate to the functions of the equipment. If by chance a piece of equipment has linear and area functions, list it twice. One record to show linear costs in inches or feet and a second entry for square feet.

In the example below, it shows you can also account for outsourced processes. You can "treat" outsourcing as if it were internal equipment.

Record navigation bar works the same in every screen. Please refer to the Employees section of this user manual for a description of the button functions.

Click on the X button in the upper right-hand corner to save and close.



The screenshot shows a window titled "Standard Equipment Costs" with a close button (X) in the top right corner. The window contains a table with three columns: "Equipment Description", "Standard Cost", and "Unit Of Measurement". The table has three rows of data. The first row is "Wide Format Printer" with a cost of "\$0.10" and unit "Square foot". The second row is "Outsource: Lamination" with a cost of "\$1.80" and unit "Square foot". The third row is empty with a cost of "\$0.00". At the bottom of the window, there is a record navigation bar with the text "Record: 2 of 2" and several navigation icons.

Equipment Description	Standard Cost	Unit Of Measurement
Wide Format Printer	\$0.10	Square foot
Outsource: Lamination	\$1.80	Square foot
	\$0.00	

Products

Click on the *Products* button in Other Information.

Enter a Category Name. The profit margin will be the default for all products created in this category. You can override the margin on a case-by-case basis in your estimates. Please see appendix A to understand how margin is calculated and how it differs from markup.

Subcategories allow you to group products within a category. In the example below, we've divided vinyl lettering into two groups: autos and windows.

For each product, give it a brief description and cost. The cost is your actual cost, not your retail charge to the customer. Your retail price for this line item will be the cost plus the category margin. Charges for setup, travel, etc should all be separate line items as services and products.

Check if the product is taxable. Typically, goods and materials are taxable and labor items are not. Consult with your accountant if you have questions.

Not sure what to how to cost your products or services? Well, we figured you might appreciate a costing tool. In the next section we'll explain the *Calculate Cost* button.

Record navigation bar works the same in every screen. Please refer to the Employees section of this user manual for a description of the button functions.

Click on the X button in the upper right-hand corner to close.

Products & Services

Category Name Vinyl Lettering **Profit Margin** 30 %

Sub Category

- ▶ Auto
- Window
- * [Empty]

Use this NavBar to select Sub Categories
Record: [Home] [Left] [1] [Right] [End] of 2

Product Name	Unit Cost	Taxable	
▶ Standard 2"	\$0.00	<input checked="" type="checkbox"/>	Calculate Cost
Promo Name & Number Bundle, 2 doors	\$65.00	<input checked="" type="checkbox"/>	Calculate Cost
* [Empty]	\$0.00	<input checked="" type="checkbox"/>	Calculate Cost

Use this NavBar to select Products
Record: [Home] [Left] [1] [Right] [End] of 2

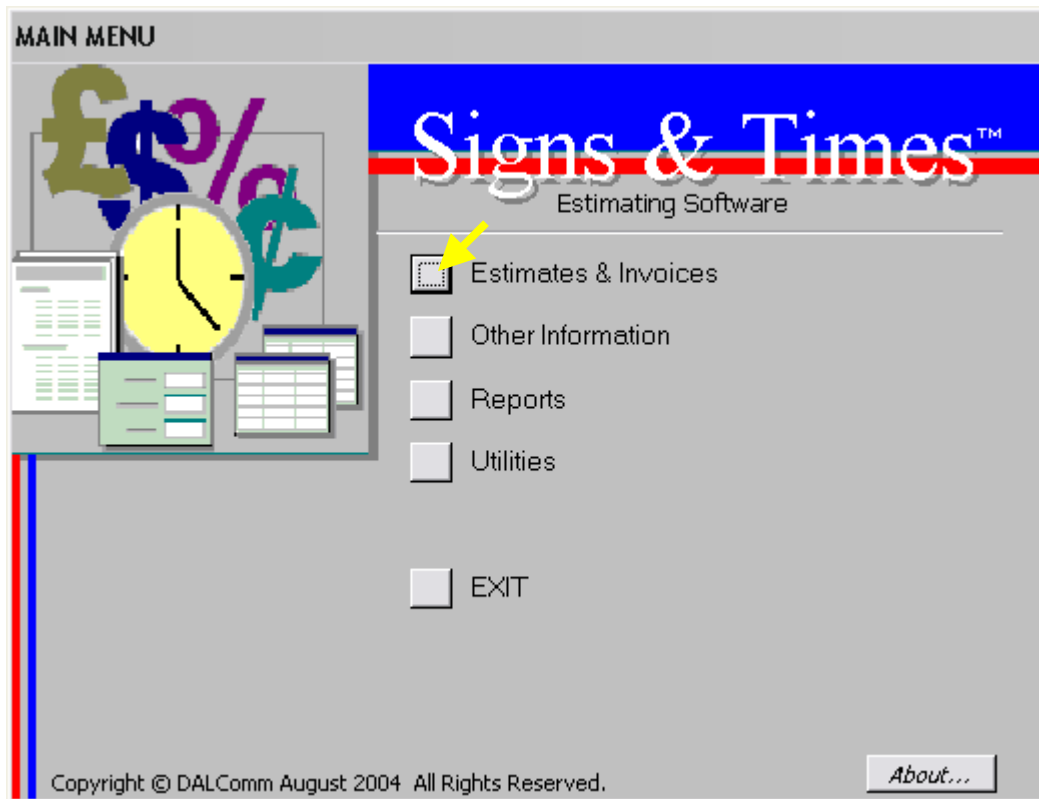
Use this NavBar to select Categories
Record: [Home] [Left] [1] [Right] [End] of 1

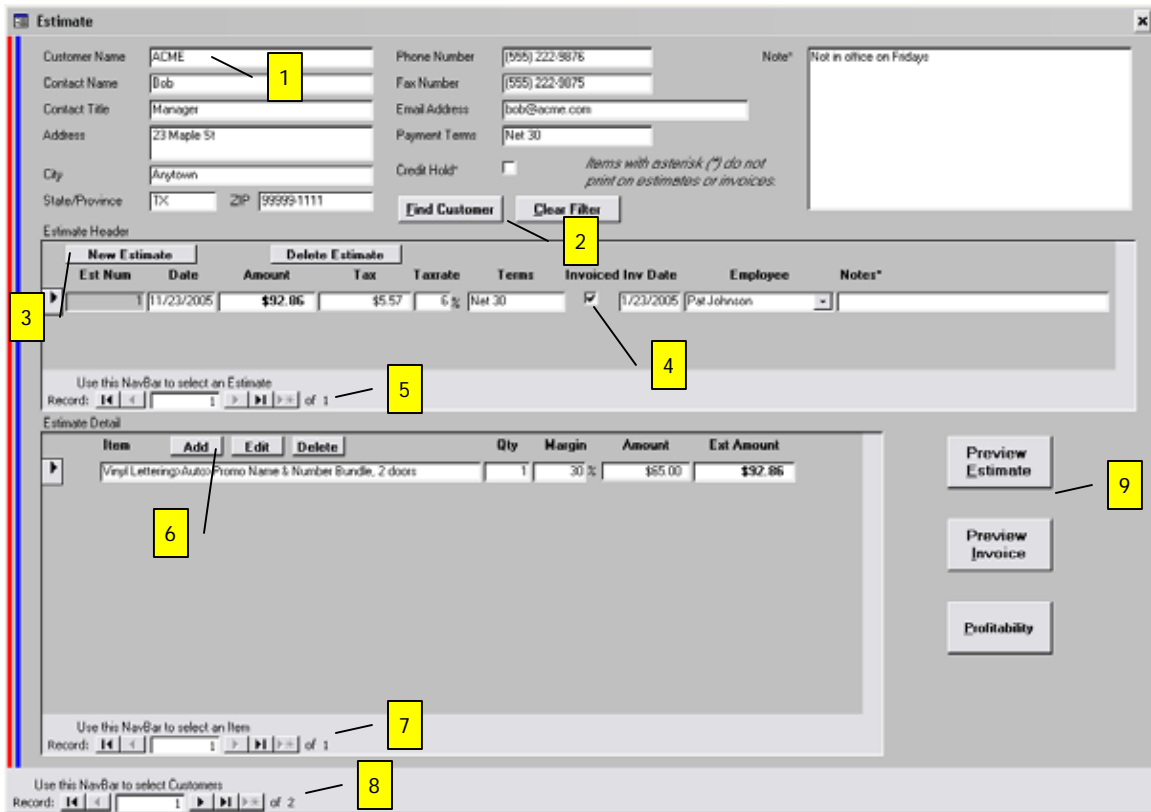
Estimates & Invoices

Estimates are designed for quick and simple navigation while presenting a broad view of customer detail. You can create new customers, create estimates, convert to an invoice, view customer history, print hard copies and even see how much profit you'll clear on any given estimate.

Main Menu

Click on the *Estimated and Invoices* Button in the Main Menu.





1. Customer information
2. Find customers
3. Manage estimates
4. Mark estimate as invoiced
5. Estimate NavBar
6. Manage estimate details
7. Estimate detail NavBar
8. Customer NavBar
9. Print estimates, invoices and check profitability

Customer Information

You can edit customer information in the same way you can in *Customers* under *Other Information*. Complete all information as much as possible. Data items like *Credit Hold* and *Notes* are visible on the screen only. They are not printed on estimates or invoices.

To add new customers, you'll need to close this form and add them through the *Customers* form under *Other Information* on the *Main Menu*.

Find Customers

Click on *Find Customer* to quickly find a specific customer. You may sort the list by *Customer Name* or *City* by clicking on the radio buttons. When you have found the desired customer, double-click the customer's name. The *Estimate* form will be set to the selected customer.

When you use Find Customer, you will need to click *Clear Filter* before you can move to other customer records with the *Customer NavBar* (8).

Click on the X button in the upper right-hand corner to close.

Customer Name	City	Phone Number
ACME	Anytown	5552229876

Manage Estimates

Click on *New Estimate* to add a new estimate. You may edit any of the fields except *Amount*, *Tax* and *Taxrate*. *Taxrate* can only be edited through the *Customers* form under *Other Information* on the *Main Menu*. *Amount* and *Tax* are calculated values from items in *Estimate Detail*.

Notes are for remarks specific to that estimate/invoice. Again, these notes are for viewing only and are not printed on estimates or invoices.

Click on *Delete Estimate* to completely remove an estimate/invoice and all of the associated details. You will be prompted to confirm the deletion.

Mark Estimate as Invoiced

When a customer has accepted your estimate simply check the *Invoiced* box and confirm the date. The *Invoiced Date* will be your date of billing from which your payment terms begin and is printed on your invoice form. If you are tracking sales by employee, select the employee from the pull down list. *Employees* can only be edited through the *Employees* form under *Other Information* on the *Main Menu*.

Notes may be used for any reminders specific to a given invoice. They are not printed on the invoice form.

Estimate NavBar

NavBars allow you to navigate through the various records in your database. The Estimate NavBar navigates through estimates for the customer displayed at the top of the form.

Click on the far left button to move to the first customer estimate. Click on the button next to it to move to a previous estimate.



Click on the middle-right button to move to the latest customer estimate. Click on the one next to it to move to the next estimate. The button with the asterisk is disabled on this form.

Manage Estimate Details

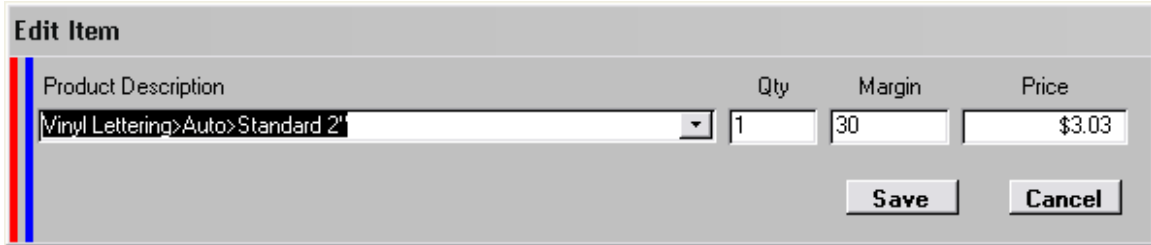
Before you can manage estimate details, you'll need to create a *New Estimate* explained above in Manage Estimates. Once you've selected (highlighted) the desired estimate, click on *Add* to add the product or service you are quoting.

A screenshot of the 'Add Item' form. It has a title bar 'Add Item' and a table with columns: Product Description, Qty, Margin, and Price. The first row shows 'Vinyl Lettering>Auto>Standard 2'' in the Product Description column, '1' in Qty, '30' in Margin, and '\$3.03' in Price. A second row shows 'Vinyl Lettering>Auto>Promo Name & Number Bundle, 2 doors' and a third row shows 'Vinyl Lettering>Auto>Standard 2'' (highlighted). There are 'Save' and 'Cancel' buttons at the bottom right.

Select the product or service from the pull down list. Adjust the quantity, margin and price as needed. These values are the defaults that you created when pricing was calculated in the Setup section of this manual. You can override

these defaults if desired. Click *Save* to complete the item. Repeat this process for additional items. Click *Cancel* to return to the *Estimate* form without saving.

Click on Edit to change any existing line item.



You can change the product selection or any of the other fields, then click *Save* to save your changes. Click *Cancel* to return to the *Estimate* form without saving.

Click on Delete to remove any line item. The line item will be removed without prompt for confirmation.

Estimate Detail NavBar

NavBars allow you to navigate through the various records in your database. The Estimate Detail NavBar navigates through details for the estimates displayed in the middle of the form.

Click on the far left button to move to the first line item. Click on the button next to it to move to a previous line item.



Click on the middle-right button to move to the last item. Click on the one next to it to move to the next line item. The button with the asterisk is disabled on this form.


Customer NavBar

Like above, you can navigate through your customer records. Click on the far left button to move to the first customer. Click on the button next to it to move to a previous customer.




Click on the middle-right button to move to the last customer. Click on the one next to it to move to the next customer. The button with the asterisk is disabled on this form.


Print Estimates, Invoices and Check Profitability

Click on *Preview Estimate* to view and print the estimate. Print the estimate by clicking on the printer icon button  at the top left-hand corner of your screen. The estimate will print to your default printer.

Click on the X button in the upper right-hand corner to close if you don't want to print out the estimate.

The *Preview Invoice* button will be disabled until the *Invoiced* box is checked. Print the invoice by clicking on the printer icon button  at the top left-hand corner of your screen. The invoice will print to your default printer.

Click on the X button in the upper right-hand corner to close if you don't want to print out the invoice.

Click on Profitability to see how much profit you are making on each line item and as a whole. Print the profitability report by clicking on the printer icon button  at the top left-hand corner of your screen. The report will print to your default printer.

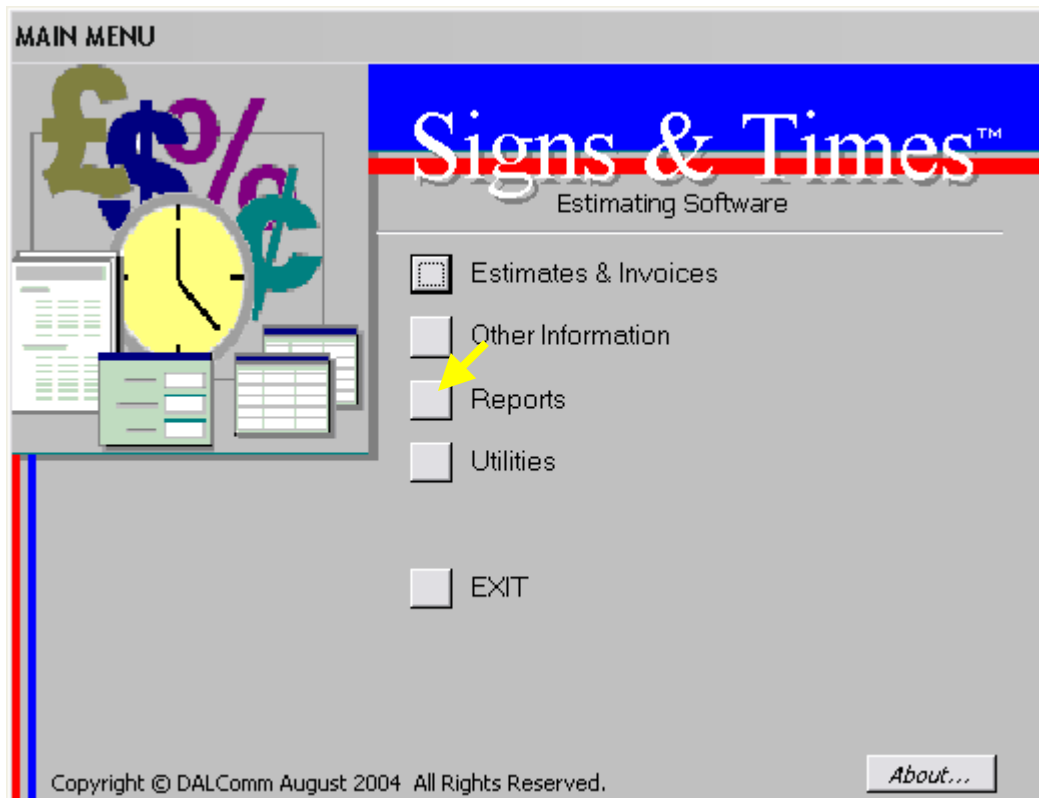
Click on the X button in the upper right-hand corner to close if you don't want to print out the report.

Reports


Reports are designed to provide a summary of activity and results within a time period you specify.

Main Menu

Click on the *Reports* Button in the Main Menu.



Preview the Period Sales Report

Enter the beginning and ending dates for the period of time you are interested in and then click on *Preview*. This report will summarize all of the invoices that have been generated from estimates for the given period. Print the report by clicking on the printer icon button  at the top left-hand corner of your screen. The report will print to your default printer.

Click on the X button in the upper right-hand corner to close if you don't want to print out the report.

Preview the Period Pending Sales Report

Enter the beginning and ending dates for the period of time you are interested in and then click on *Preview*. Similar to the Sales Report, this report will summarize all of the estimates that have been created for the given period. Print the report by clicking on the printer icon button at the top left-hand corner of your screen. The report will print to your default printer.

Click on the X button in the upper right-hand corner to close if you don't want to print out the report.

Preview the Profitability Report

Enter the beginning and ending dates for the period of time you are interested in and then click on *Preview*. This report will summarize overall profitability and profitability by customer that has been generated over the given period. This is a valuable tool in understanding where your business is performing well; where you can improve; and maybe identifying some services that should be abandoned. Print the report by clicking on the printer icon button at the top left-hand corner of your screen. The report will print to your default printer.

Click on the X button in the upper right-hand corner to close if you don't want to print out the report.

Preview the Customer List

This report will list your customers alphabetically by each state. It includes the flag for credit hold and any notes you've entered from the *Customer* screen. Print the report by clicking on the printer icon button at the top left-hand corner of your screen. The report will print to your default printer.

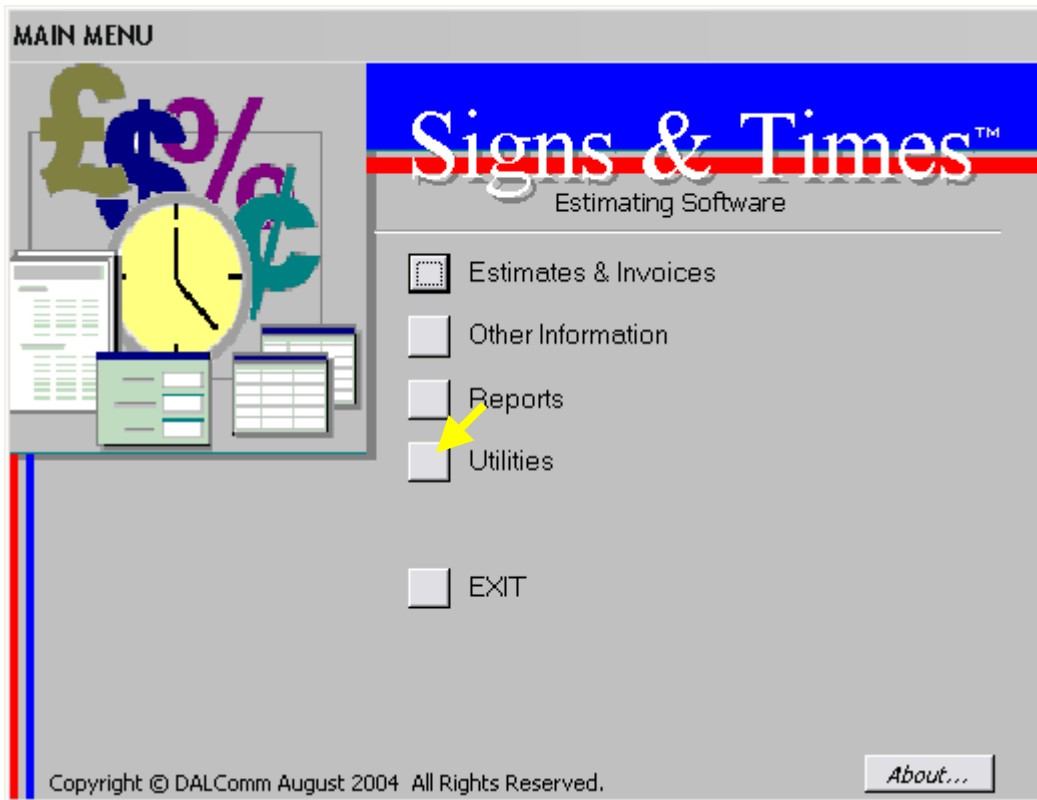
Click on the X button in the upper right-hand corner to close if you don't want to print out the report.

Utilities

Utilities are designed to provide software maintenance functions.

Main Menu

Click on the *Utilities* Button in the Main Menu.



Restore Data from Backup

Backups are useful when data gets mistakenly deleted by a user, an employee makes a mess of things or you're in some similar bind. You can go back to a last known good set of data.

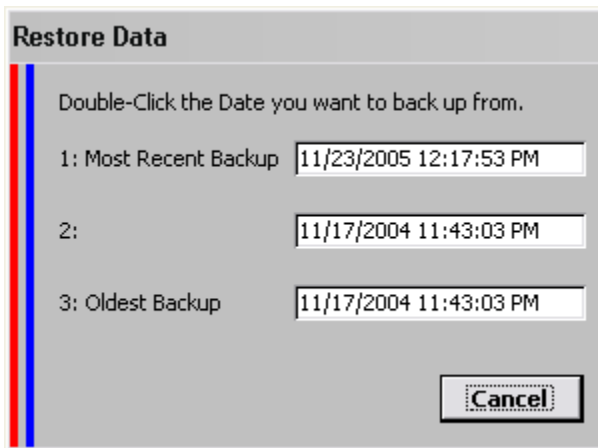
First, let's explain how your database gets automatically backed up. Each time you completely close Signs & Times™, a backup copy of your data gets created. Backups are managed in such a way that Signs & Times™ keeps track of your last three (3) backups.

We recommend that you leave Signs & Times™ open while working through your day rather than opening and closing it each time you need it. If opened and closed frequently, you may only have a span of a few minutes or hours for backup.

WARNING: Once you restore from a backup, you cannot undo this procedure.

Double-Click on the preferred backup date from the three listed. When complete, you will get confirmation that the backup was completed successfully.

Click on the *Cancel* button if you do not want to restore from a backup.



Appendix A: Profit Margin

Signs & Times calculates profit by margin, not markup. There is a significant difference. For example, let's say I run a company and figure I'm doing ok at a 30% margin when I really just use a 30% markup on my products and services (thinking they are the same). So let's calculate based on a \$500 job...

Markup Price = Cost x (1 + Markup)
 Price = \$500 x (1 + .30)
 Price = \$500 x (1.30)
 Price = \$650

 Profit = Sales Price – Cost = \$650 - \$500 = \$150.00

Margin Price = Cost / (1 – Margin)
 Price = \$500 / (1 - .30)
 Price = \$500 / (.70)
 Price = \$714.29

 Profit = Sales Price – Cost = \$714.29 - \$500 = \$214.29

Oops! Pricing based on a 30% markup comes up short from operating business at a 30% margin! Using that same job, let's figure what margin we would really run at if using a 30% markup on our costs.

Margin = 1 – (Cost / Price)
Margin = 1 – (\$500 / \$650)
Margin = 1 – (.77)
Margin = 23%

No wonder things have been tight! I've been missing 7% in my "margin".

Considerations when choosing a margin best for you depend on your fixed costs/overhead, what the market can bear and your ambitions. Basically, if you gross \$80,000 annually and you are truly running at a 30% margin, you should have \$24,000 to cover your overhead. Any excess beyond your overhead equals sweat equity! All direct labor, consumed inventory, etc has already been paid for in the costing at 70%. If you need more equity, then increase either margins and/or gross sales or decrease your costs.

We hope this has been helpful. We know Signs & Times will be invaluable in defining costs and managing margins. We wish you the best in success! Please let us know if there are features that would help even more.