Guide For Builders, Plumbers and Other Trades

Introduction

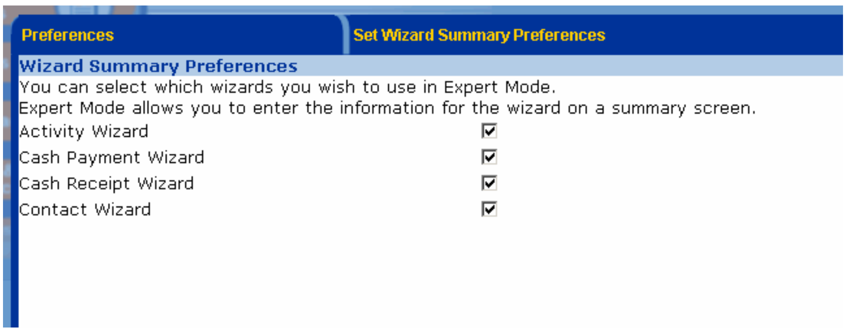
Not only is My Business very easy to use, it is a very powerful tool for small businesses. My Business has been designed to suit all small businesses, in particular those in the construction industry and other trades, which involve invoicing, time management, chargeable time, stock, expense management, management and marketing to a wide range of contacts.

The Complete Manager Home Page

The following guide is intended to point you towards some of the most useful functions to suit your business. Remember you don't need to use all of these functions from day 1. Start with some key activities and build up you activities over time, as you feel comfortable with the software.

With My Business you can:	EasyBooks	Essentials	My Business
Raise a quote or invoice from scratch	✓	✓	✓
Track income and expense categories to identify your profitable projects	✓	✓	✓
Raise a quote or invoice from a previous quote or invoice	✓	✓	✓
Manage your price lists and stock		✓	✓
Use your Diary and Service Items to set up Chargeable Time reminders		✓	✓
Use your Diary to set up appointments for you and your staff		✓	✓
For construction businesses My Business will handle CIS4 invoicing	✓	✓	✓
Manage all of your contacts	✓	✓	✓
Manage your VAT			
Manage your projects		✓	✓
Create mailings to your contact lists			✓
Be reminded of late invoices and create automatic Reminder Invoices		✓	✓

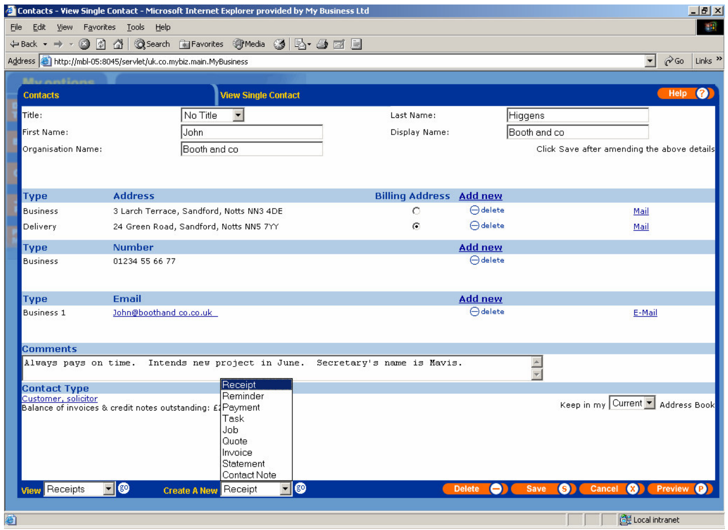
Tip 1: My Business uses "wizards" to make it very easy to create tasks and activities. If you want to stop using these wizards go to Home Page / Admin / Preferences / Wizard Summary and tick the relevant boxes, to be able to go straight to summary page for faster data entry.



Contacts

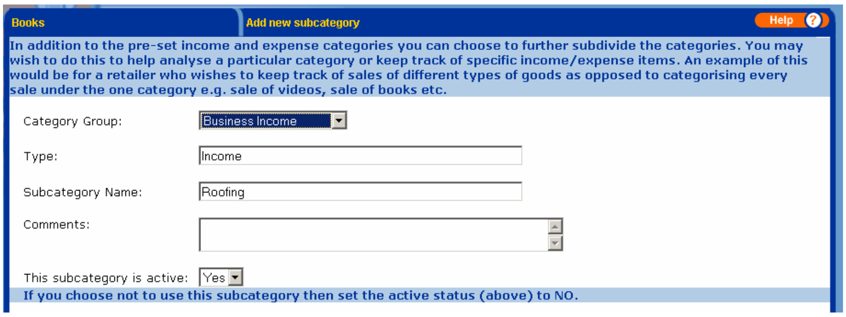
My Business contains a very powerful and easy to use Contact Manager. You can use Contacts to create supplier invoices, payments, diary reminders, and statements, contact notes or set up order reminders. Diary reminders can be used for future contacts for example; follow up service calls, maintenance etc…

First you will need to set up your contacts. Go to Contacts / Add A New Contact and simple follow the wizard. You can create as many different categories of contact that you want. You can also give contacts more than one category – e.g. Prospect / Roofing. When you have set up your contact you can raise activities from here, or view previous activities.



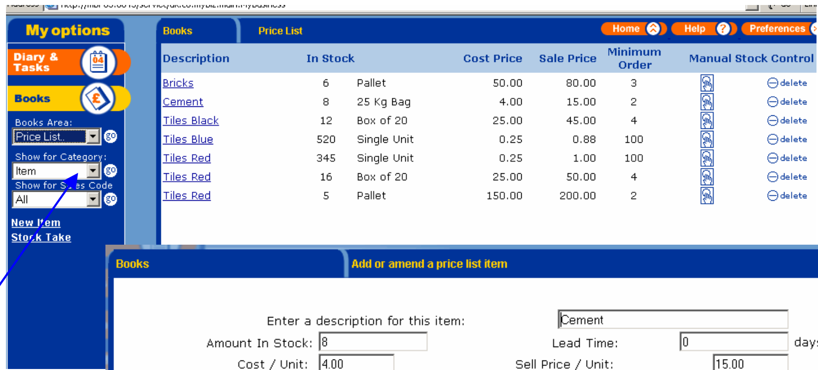
Set Up Income and Expense Categories

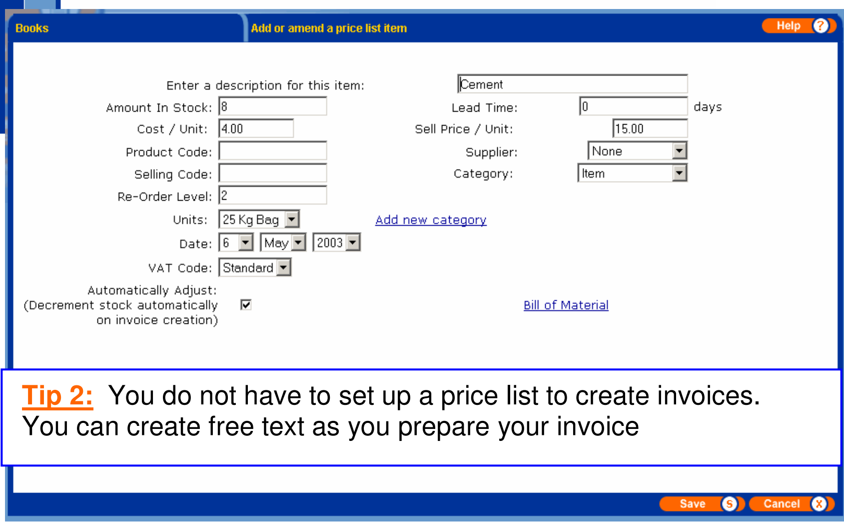
It's very important to understand where you spend and make money. You can analyse your sales by category by setting up income and expense categories. Go to Accounts /Income and Expense / Add Sub-category. You might want to track all incomes and expenses against different jobs and projects such as Roofing, Patios or Conservatories to see which ones you should focus on for profit.



Stock and Price List Management

You can manage all of your stock and price list items very easily with My Business. Go to Accounts/price List/ new Item so that you can set up all of the items that you sell. Put in the cost to you of these items and also the selling price. Having set up your price list you will be able to add these items into your invoices later.



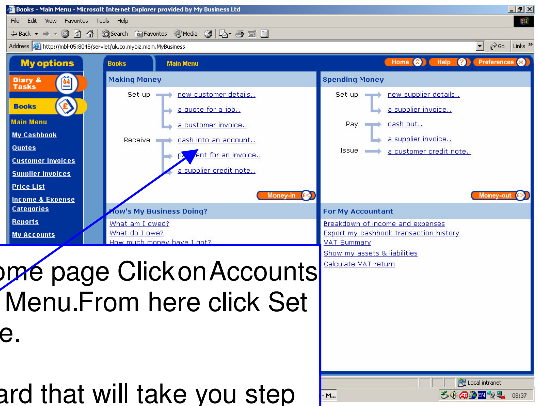


If items are time related (Surveys, Installation, John's Time etc.) select Service Items on the left hand side and enter the data as a Service Item. This will allow the software to track your chargeable time form your diary.

Tip 2: You do not have to set up a price list to create invoices. You can create free text as you prepare your invoice

If you want the software to manage your stock put in a stock amount, add your minimum re-order level (at which the software will remind you to reorder) and tick the Automatic Adjust box. The software will now adjust stock levels when you create customer or supplier invoices. You can also manually adjust stock levels through the Stock Take option.

Set Up an Invoice or Quote:

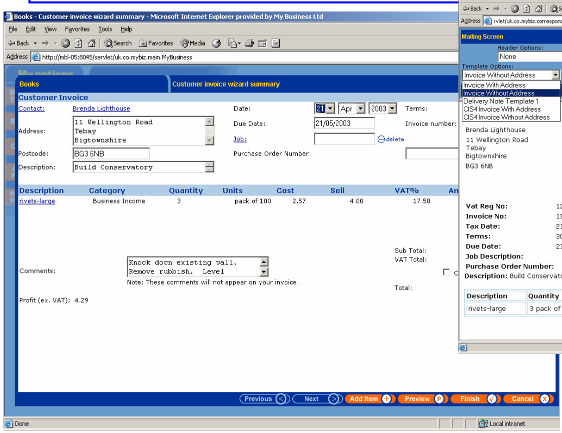


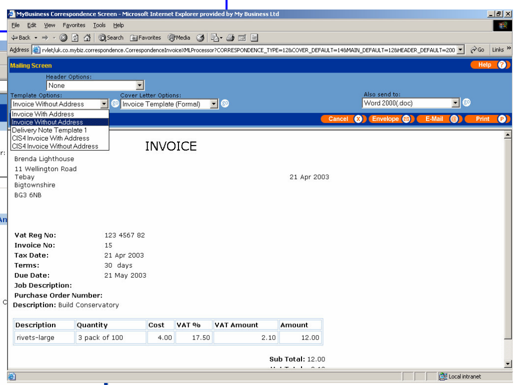
My Business allows you to set up and manage professional invoices and quotes very easily. Setting up an invoice or quote is a very similar process. Go to Accounts/Making Money/Set Up Customer Invoice. You can raise Invoices from Quotes or Invoices already done for this type of work. You can create a reminder to follow up your quotes and the product will automatically remind you of overdue invoices. If you are a subcontractor you can produce CIS4 invoices by selecting the CIS4 template.

From The My Business Home page Click on Accounts to go to the Accounts Main Menu. From here click Set up a new Customer Invoice.

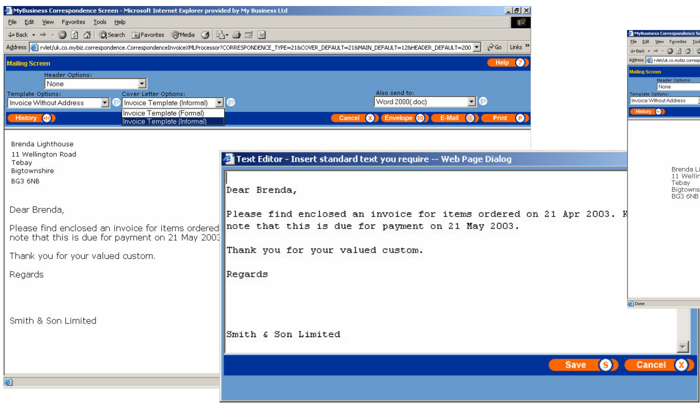
This starts the invoice wizard that will take you step by step through setting up an invoice. Only answer the questions that are relevant and ignore those you don't want to answer.

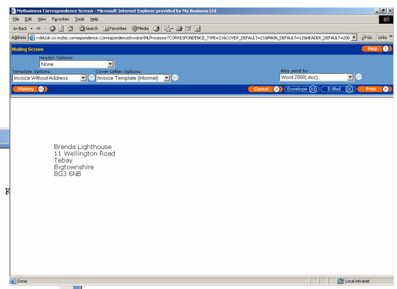
At the end of the Invoice Wizard you will find see the Invoice Summary. Here you can select if you want to use CIS4 VAT for sub-contractors. If you are happy with the details (you can add, delete, amend items at any stage), click Preview to view your finished invoice. Select the header options and template style you require (e.g. Header = none, and Invoice without address, if you want to print on letterhead with your address already Pre-printed).





You can now select the letter template you want to send with the Invoice. Click on the words to amend the copy. Select Envelop to create an envelope. Select print to print any of the documents.

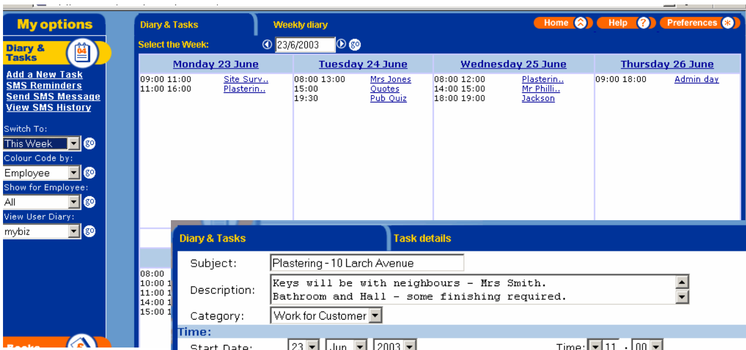


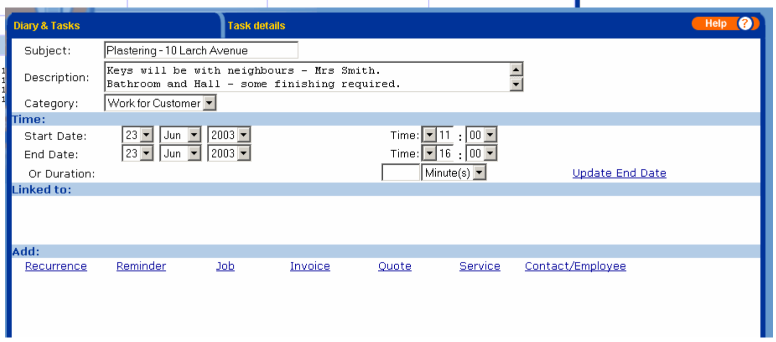


Manage Expenses

You can use the software to manage your basic expenses very easily. Go to Accounts/Pay Cash Out. Describe the payment, for example; "Fuel" or "Bricks" and then summarise the category of expenses for example; "Motor", or "Cost of Sales". These costs will then appear in your cashbook and you will be able to track expenditure through your reports.

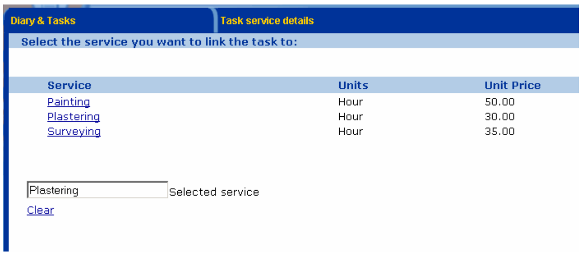
Diary





The software contains a very easy to use and powerful diary and time management system. Use the diary to set up appointments and tasks. When you set up an appointment you can choose to set the time as chargeable and the software will remind you later to invoice for this time. To set up an appointment go to Diary / Add New Task.

Add chargeable time by clicking service. Link the task to a customer or employee by selecting "Contact".



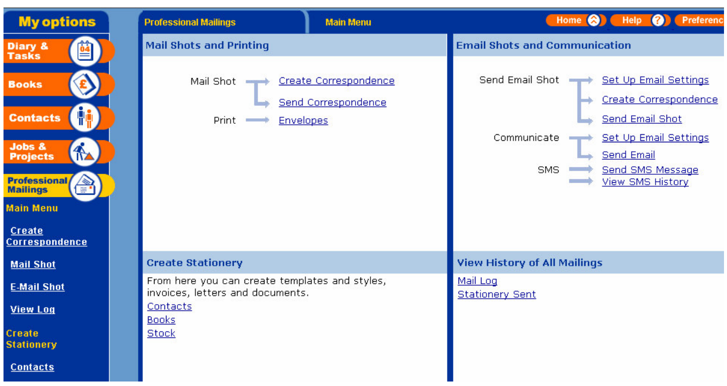
Any contact which you categorise as an "Employee" will be able to have their own diary in the system.

Projects

Projects can be a very useful function for the construction and trade industries. Projects allows you to hold all of your information relating to a Job or Project in one folder – all of your invoices, tasks, quotes etc… What's more it will even track the profitability of that project for you by summarising all of your invoices.

Projects are very easy to set up. Go to Projects / Add New Job. As long as you select that the project is "Started" you can link your activities to the project. If you select that the project is due to start then the software will remind you when this becomes overdue. To see the details within any project, click on the Task, Quote, Invoice icons.

Mailings



This software is unique because it manages all of the key aspects of running your business – including your mailings! You can create mailing templates, and select to mail or email these to any of your contacts. It is very easy to use and will help you to gain and keep your customers.

First create your correspondence or letter template and then select send correspondence to choose templates and contacts to mail.

Tip 3: Use the demo software contained on your CD to try out many if these functions before you try them for real in your business software. If you make a mistake in either version, don't worry you can change your data at any stage.

Manage Your VAT Easily

My Business offers the easiest way possible to manage your VAT. When you set up the software, select whether you are Standard or Cash VAT registered, and the software will handle your VAT with ease. You can even print out a completed VAT 100 form by going to AccountsMain Menu/Calculate My VAT Return on the right hand side.

Reports / Financial Data

My Business can provide you with a wide range of reports to let you know how your business is doing. Go to Reports and select the report you want and select the period you want to review.

If you want to export your entire Financial Data for a period into Excel, Go to Accounts Main Menu/My Accountant / Export Financial History.