The first fully-integrated productivity package for the Macintosh™.

Ensemble™

Examples

HAYDEN SOFTWARE

Developed by Controle X, Inc.

Ensemble™

EXAMPLES

HAYDEN
SOFTWARE

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Introduction

This manual walks you through some of the more powerful features of Ensemble™. Before you venture forward, you should be familiar with the fundamentals of using your Macintosh and have taken the Ensemble "Guided Tour" (disk enclosed). In addition you will get more out of this tutorial if you have already mastered the basics of using Ensemble, such as opening files, starting a new file, defining fields on a form, and moving between Ensemble applications.

Section I of this manual takes you through the development of a simple budget tracking system. In the process, you will be exposed to many of Ensemble's more useful features—how they work and what they do.

Section II explains the Mail/Merge function.

Section III identifies and explains the calculation templates provided on the enclosed EXAMPLES disk.

We strongly recommend that you make a back-up copy of your EXAMPLES disk using the procedure for disk copying outlined in your Macintosh User's Manual. In the event you destroy any data or fields during a practice session, you will be able to restore yourself to the original state using the back-up files.

> NOTE: While Ensemble has been designed to operate in 128K, there are limitations in terms of the size of records that can be processed. Users of 128K Macintosh computers may have difficulty with the templates discussed in Section III given the large space requirement of the calculations.

Learning More About Ensemble via the Budget Tracking System

Nearly every business, large or small, authorizes and controls expenditures via the Purchase Order document. Each Purchase Order amount is accumulated against an expense budget, which is set on a quarterly basis.

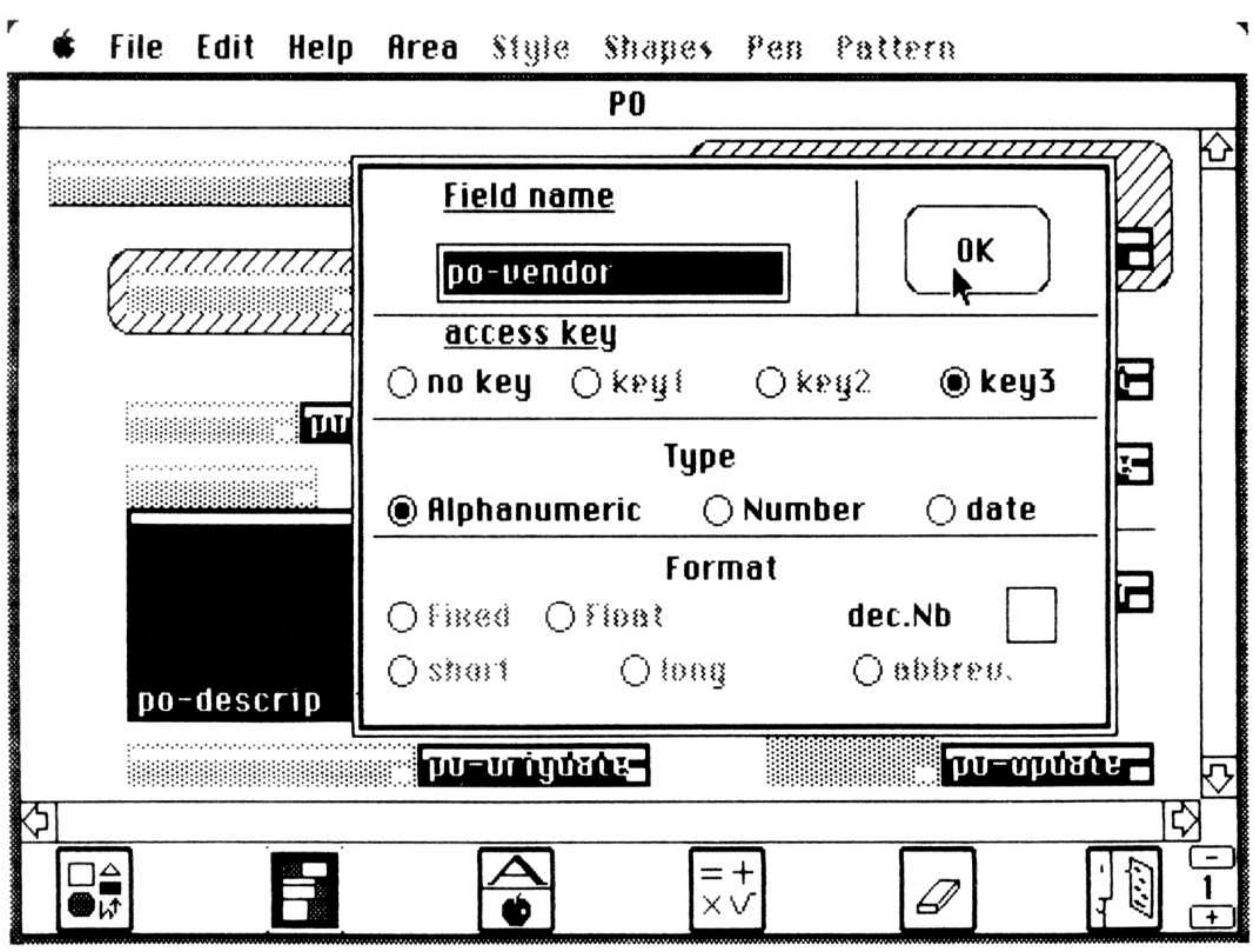
As Invoices are received, they must be matched to the relevant Purchase Order before a check can be cut. The Purchase Order and expense Budget are then updated by the matched Invoice.

Building The Purchase Order File

Creating the Form

- From the Ensemble Desktop, select OPEN from the FILE menu and retrieve the Purchase Order file, entitled PO, from your Examples disk.
- Select DESIGN from the FILE menu in order to move to the Design Window. You will note that the PO file form has been defined with the following fields:

	Field Name	Description
Alphanumeric Fields:	*po-po#*	PO Number
	po-budget	Budget Account
	po-product	Product Name
	po-vendor	Vendor Name
	po-descrip	Description
	po-origdate	Date of PO Creation
	po-update	Date of Update
Numeric Fields:	*po-amount*	PO Amount
	po-invoice	Invoiced To Date
	po-remain	Money Remaining



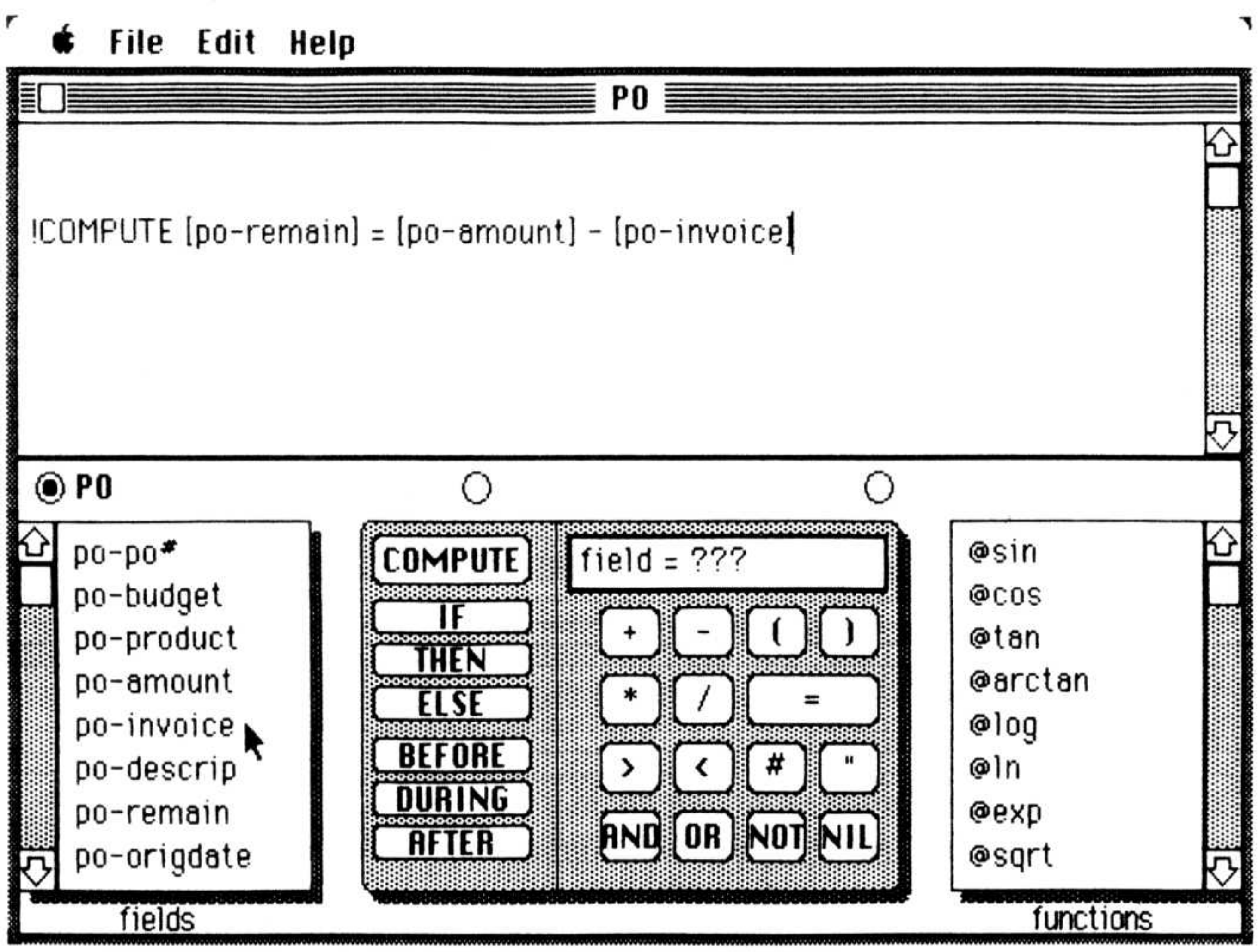
Calculations can be performed on numeric but not on alphanumeric fields. Numeric fields suppress leading zeros and store the data according to the numerical format you indicate. Select "date" type for dates.

You can practice moving and changing the different fields, but remember to return the form to its original state. You will need to retain the original format for future operations.

Setting Up Calculations

The Purchase Order form has been designed to automatically generate the "Money Remaining" field *(po-remain)* from the inputs of the PO amount *(po-amount)* and invoiced amount *(po-invoice)*.

You must complete the design by clicking the COMPUTE icon, which will cause you to move to the Computations Window. There you can define a COMPUTE statement, following the example you see below.

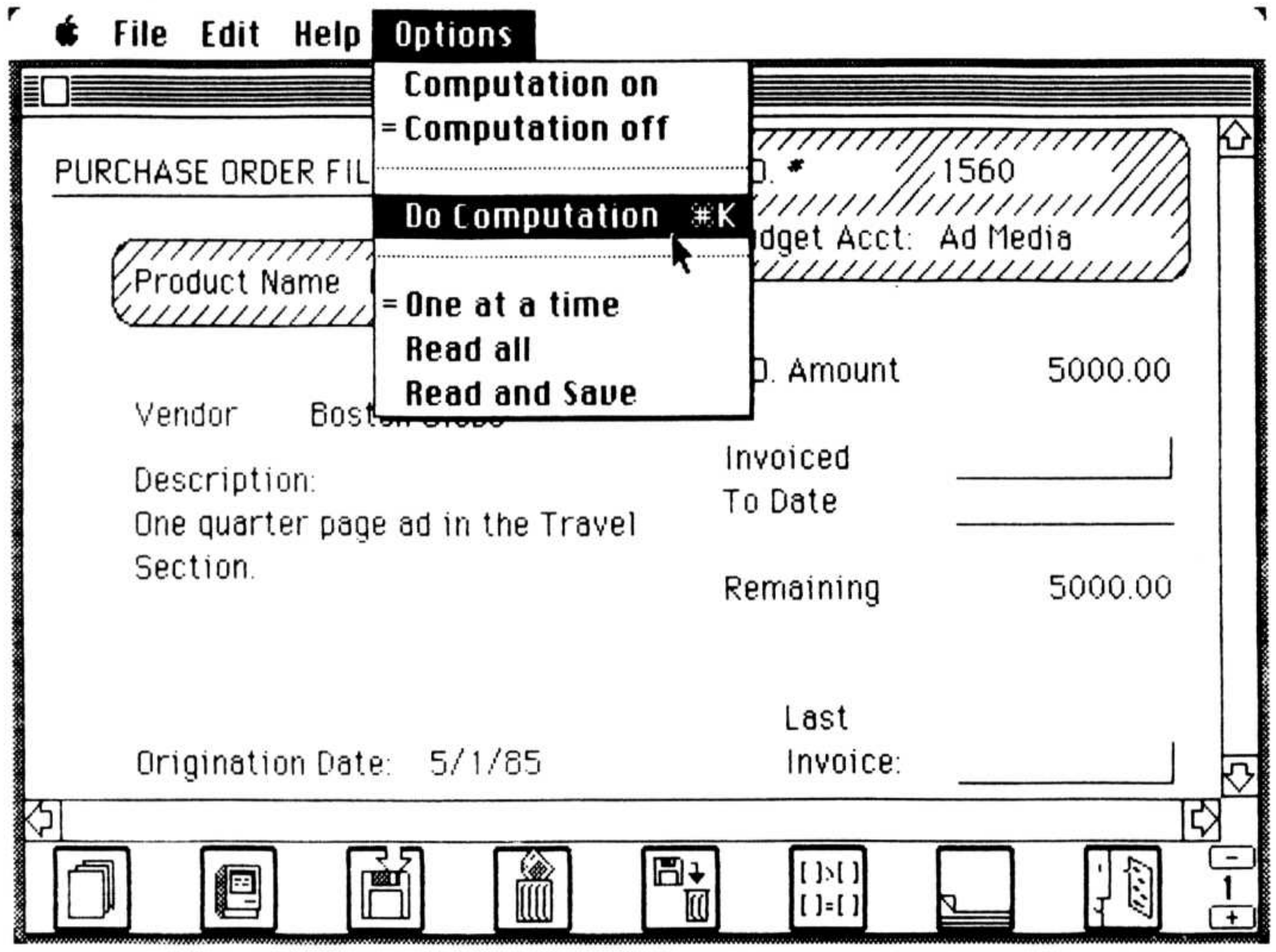


Entering Data

- Click the close box (□) to return to the Design Window.
- Then select ENTER from the FILE Menu to move to the Entry Window.
- You will be prompted to save your changes. Do so.

Data is entered via keystrokes. Allow the system to guide you through the input fields by hitting the Macintosh Enter key after each entry, or select specific fields by positioning and clicking the mouse.

After the data is entered, you perform the computation you have previously specified by selecting DO COMPUTATION from the OPTIONS menu.



If you were doing this with "live" data you could then save the completed record to disk via the SAVE  icon. However, since this would update the PO file, which contains data that will be used in future examples, we suggest you "trash" each screen record you create by clicking the CLEAR  icon.

Generating a Report

How to Specify

After you have created many records in a file, you may want to view selected data in a report. The PO file provided on the Examples disk contains a number of records that can be used for this purpose.

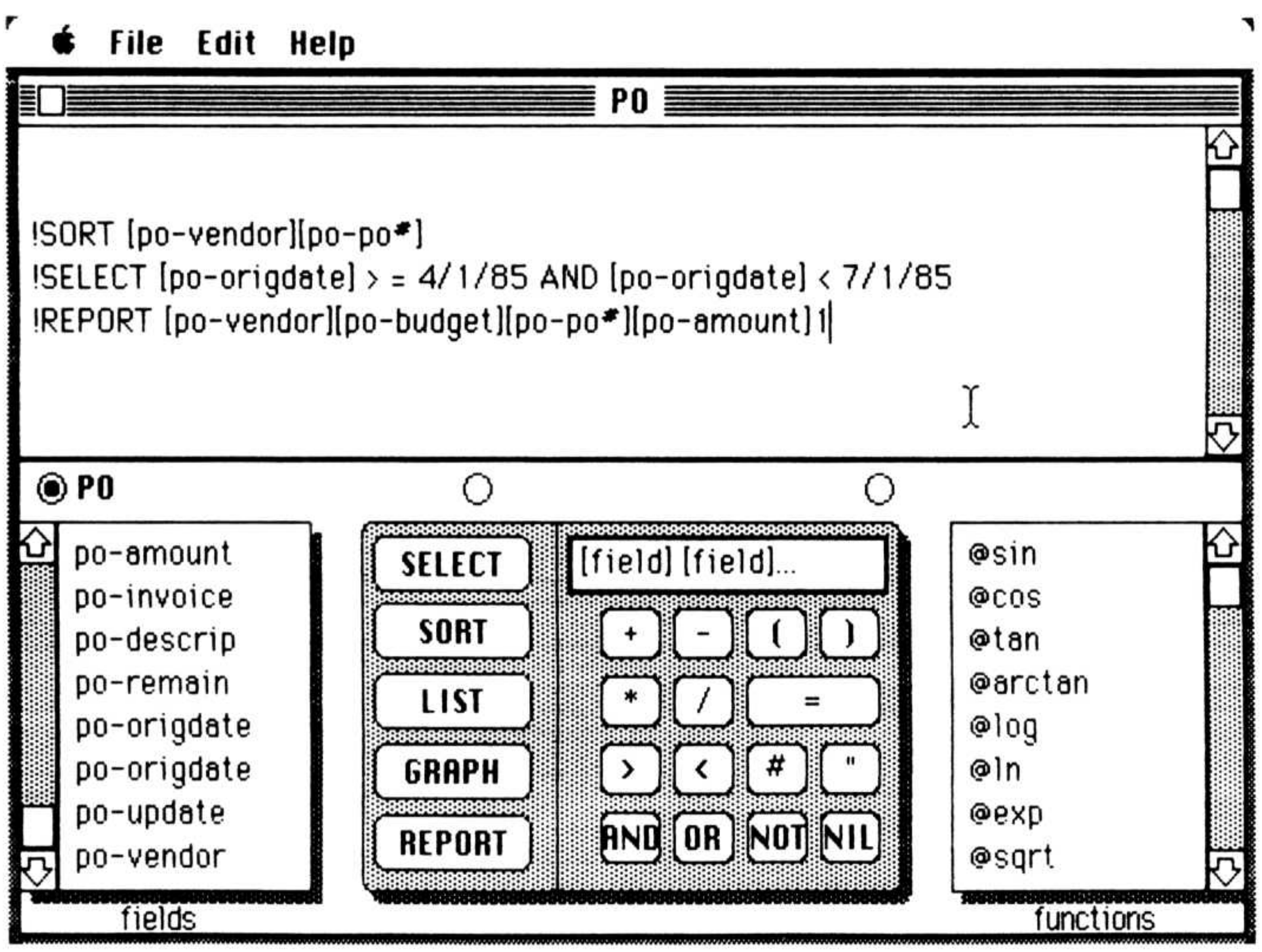
Let's generate a report that:

- Shows all PO amounts for the second quarter of the calendar year (April-June).
- Provides a report total for all PO amounts.
- Lists the data sorted by vendor:

Click the SPECIFY icon from the Entry Window of the PO file. In the Specifications Window (see example below) specify:

- A sort on vendor (*po-vendor*) and purchase order number (*po-po#*)
- Select only those records that were originated in the second quarter
- Send vendor name, budget account, the purchase order number and amount to the REPORT.

The report will be printed with the selected field names as column headings.



Note that the number 1, when typed after the !REPORT command, tells the system to print a grand total for all numeric fields.

Report Output

- Click the close box and return to the Entry Window of the PO file.
- Click the PERFORM icon to automatically execute your specifications and print the Report...

- 1 -

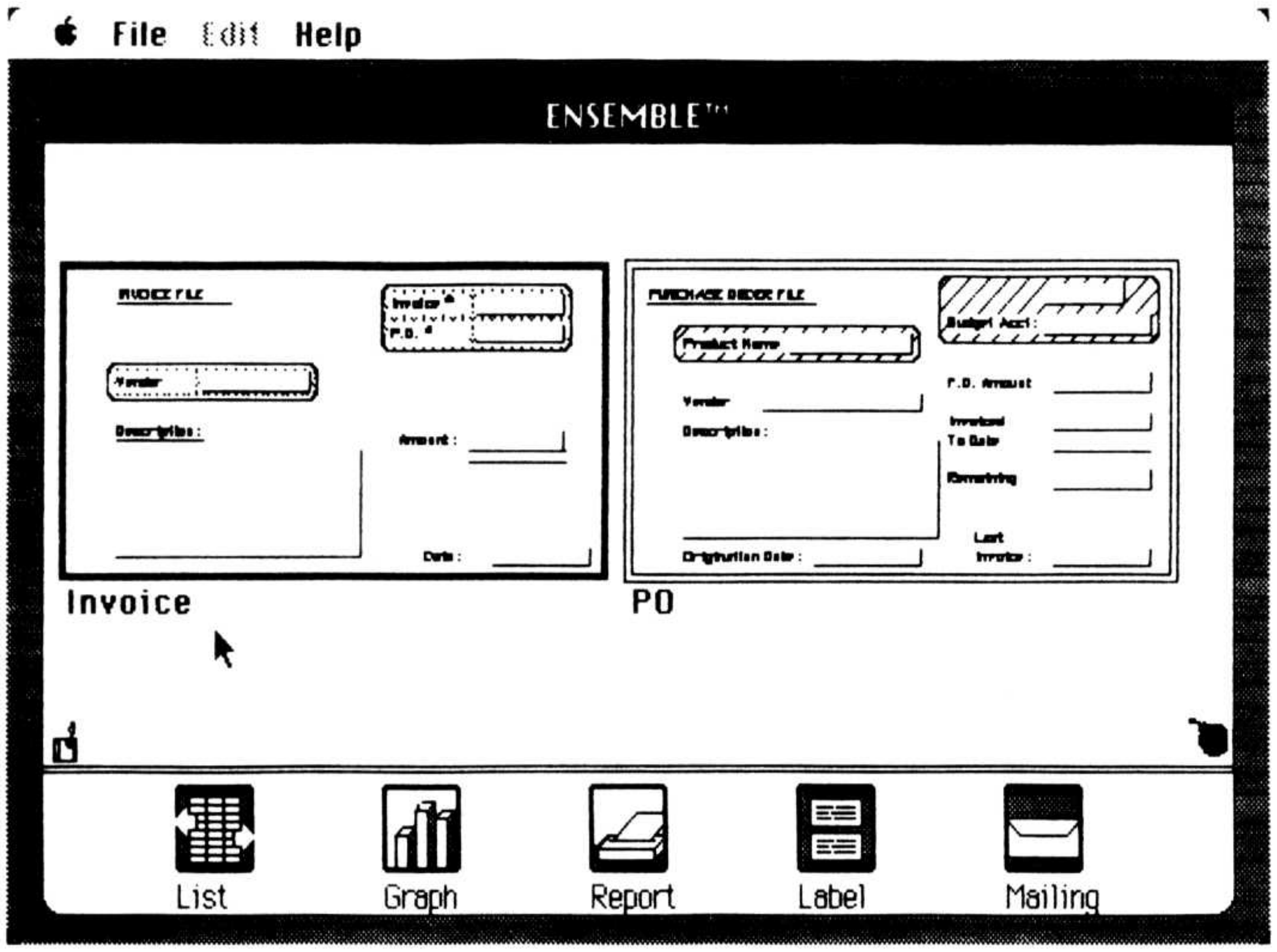
po-vendor	po-budget	po-po#	po-amount
ABC	Ad Media	1008	250000.00
Baker and Jones	Collateral	4650	1000.00
Boston Globe	Ad Media	1560	5000.00
Group Two	Collateral	3400	3500.00
Katz	Ad Media	1989	25000.00
	Ad Media	2645	25000.00
Lucas Film	Ad Production	2400	20000.00
Rama	Ad Production	1478	5000.00
	Collateral	3232	1300.00
	Collateral	4441	500.00
Rogers Assoc	PR	1150	15000.00
Stone Cutters	Ad Production	2566	10000.00
Uniglobe	T and E	1477	1000.00
Woman's Day	Ad Media	2643	30000.00
			392300.00

Updating the Purchase Order File With Invoice Data

As invoices come in you can update the PO file with the Invoice data. You can also create an Invoice record that will be saved in an Invoice file.

Open Two Files on the Ensemble Desktop

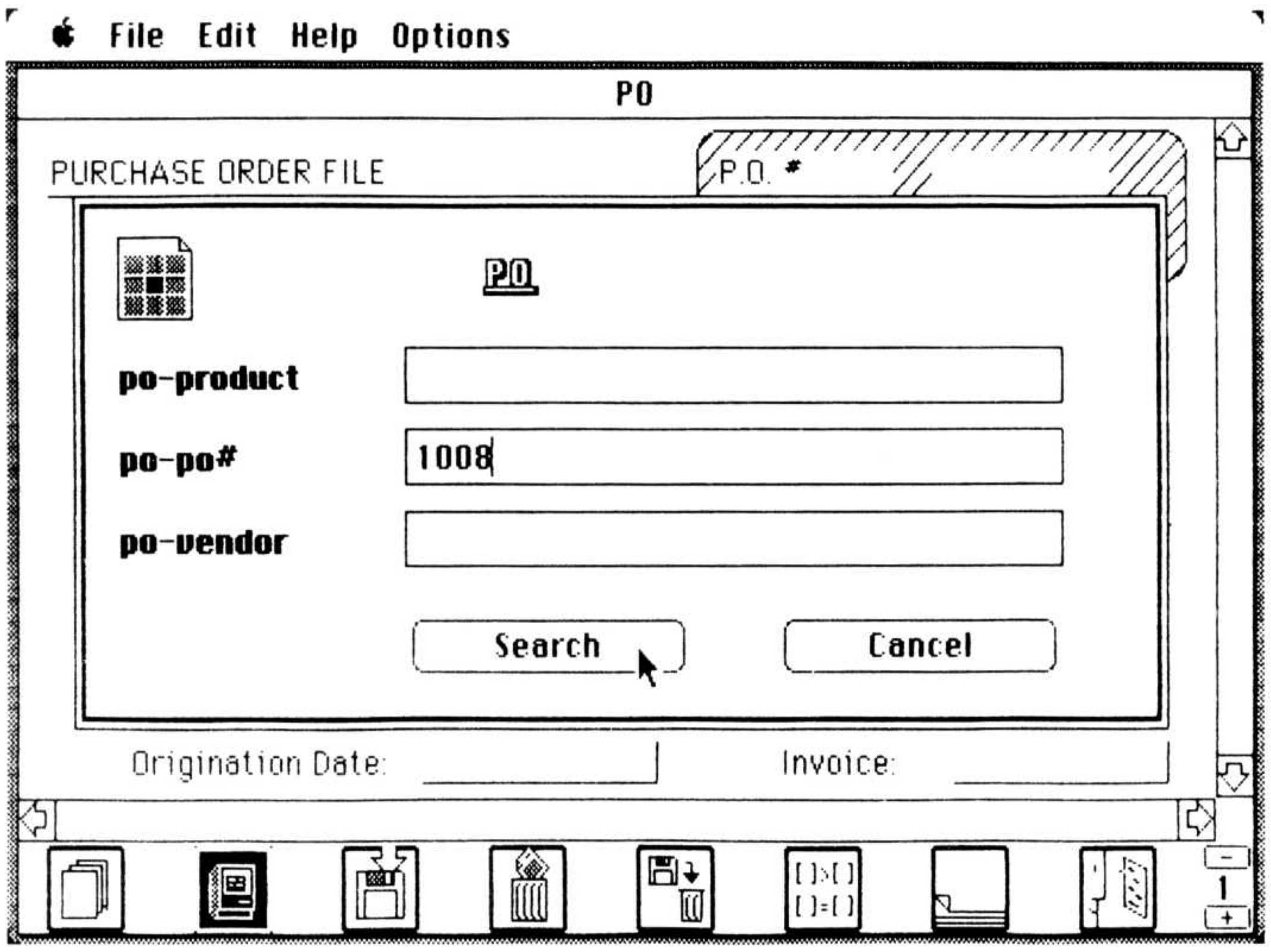
Open both the PO file and Invoice file (like the PO file, the Invoice file has been created for you and is available on your Examples disk). Here is what they look like on the Ensemble Desktop:



Match Files With Quick Retrieval Feature

The first invoice to be entered into the system contains a PO reference number of 1008. You will use this information to retrieve the appropriate purchase order.

- From the Entry Window of the PO file, click the SEARCH icon.
- Type 1008 into the *po-po#* key space (*po-po#* was set up as a quick access key during the file creation phase)
- Then click SEARCH.



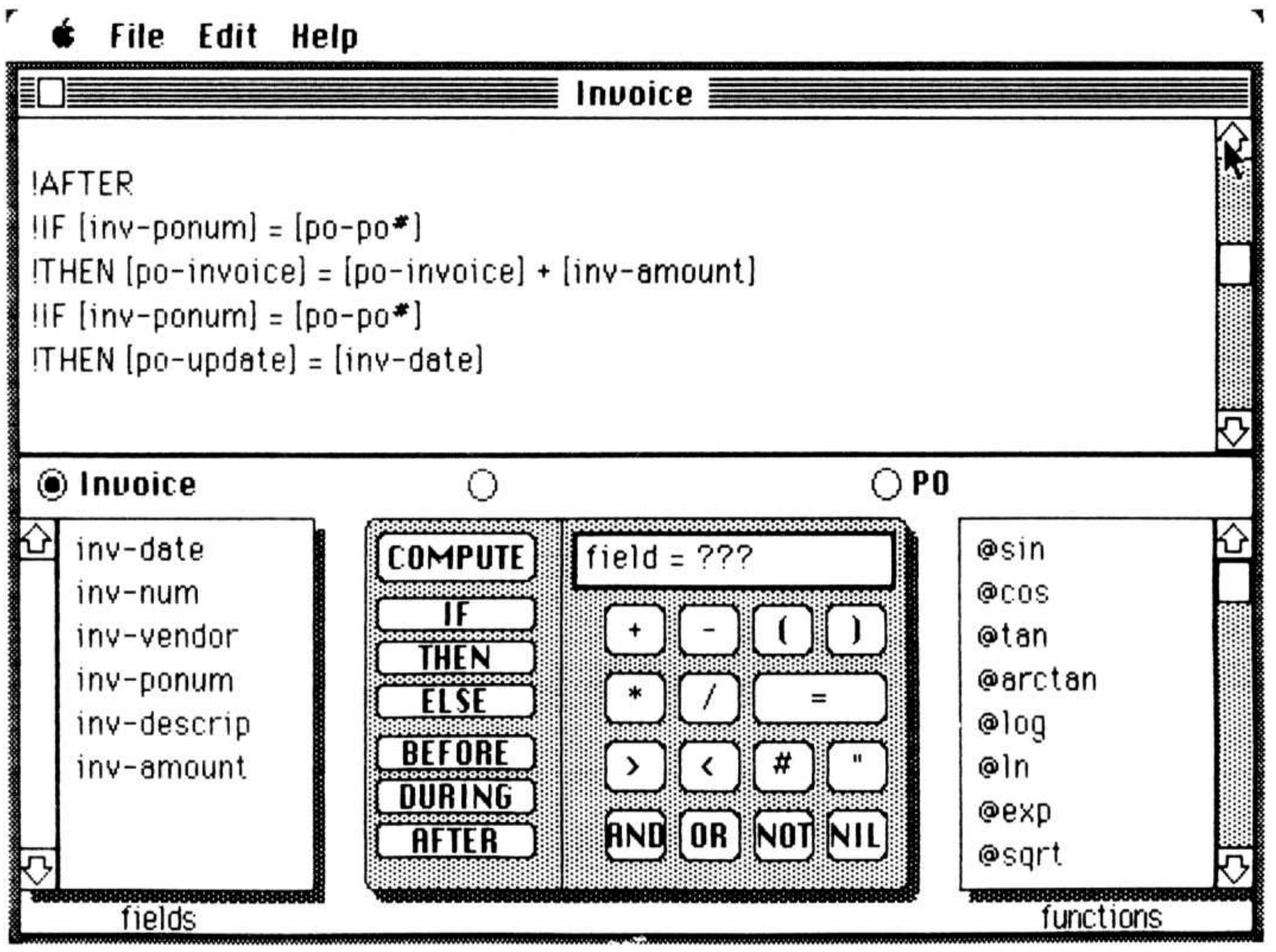
An appropriate purchase order record will appear.

Data Flow Between Files

- Return to the Ensemble Desktop and move to the Design Window of the Invoice file.
- Click the COMPUTE icon.
- In the Computations Window we will specify certain functions be performed !AFTER the Invoice record is saved to disk.

The functions are:

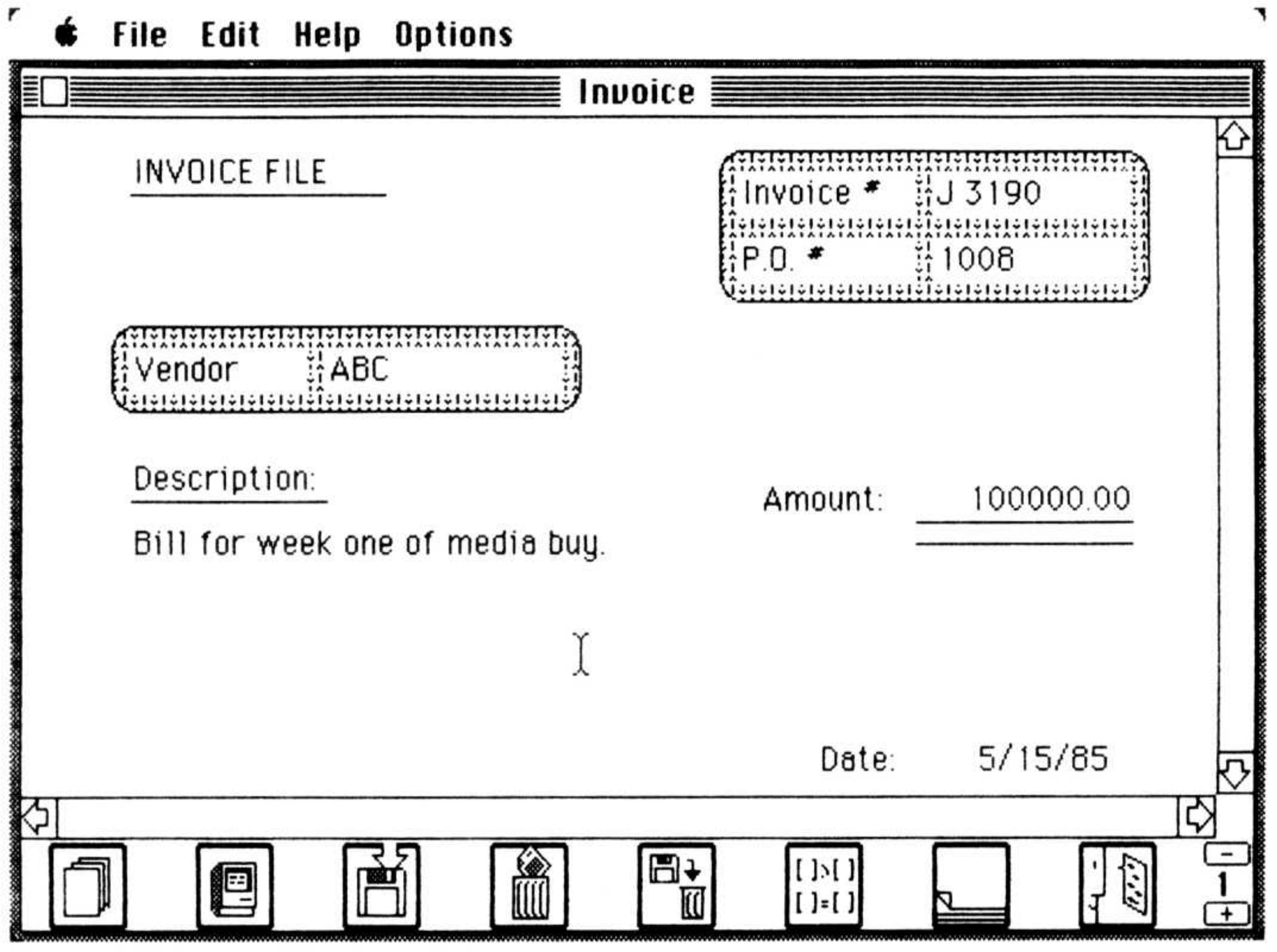
- Check to see if PO numbers match between the new Invoice file and the retrieved PO file. This precludes an unwanted update.
- If PO numbers match, update the invoiced amount field on the PO record with the new invoice charges and move the invoice date to the PO record.



- Return to the Design Window by clicking the close box.
- Select ENTER from the FILE menu.
- You will be prompted to save your changes. Do so.

Updating and Saving Records

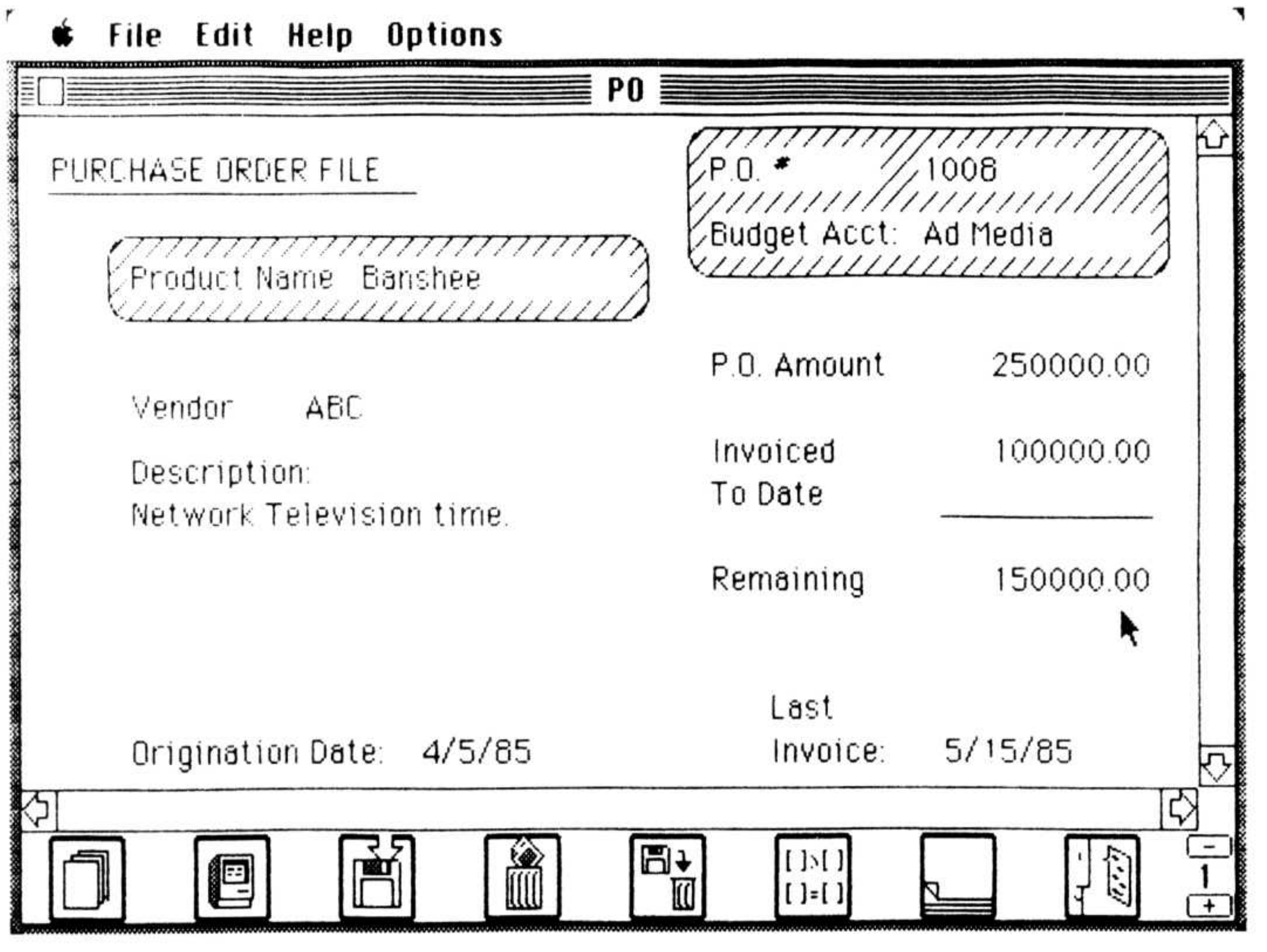
• In the Entry Window, fill in the Invoice form with the appropriate information (use the example you see below).



Then save the Invoice record to disk using the SAVE icon. This action will also trigger the calculations that move the data from the Invoice to the PO file.

- Now return to the Entry Window of the PO file (to do this you will have to pass through the Ensemble Desktop). You will note that the update has taken place.

- But one final step remains...the calculation for the money *remaining* (the difference between the PO amount and the new Invoiced-To-Date amount) needs to be made. Select DO COMPUTATION to execute the calculation.

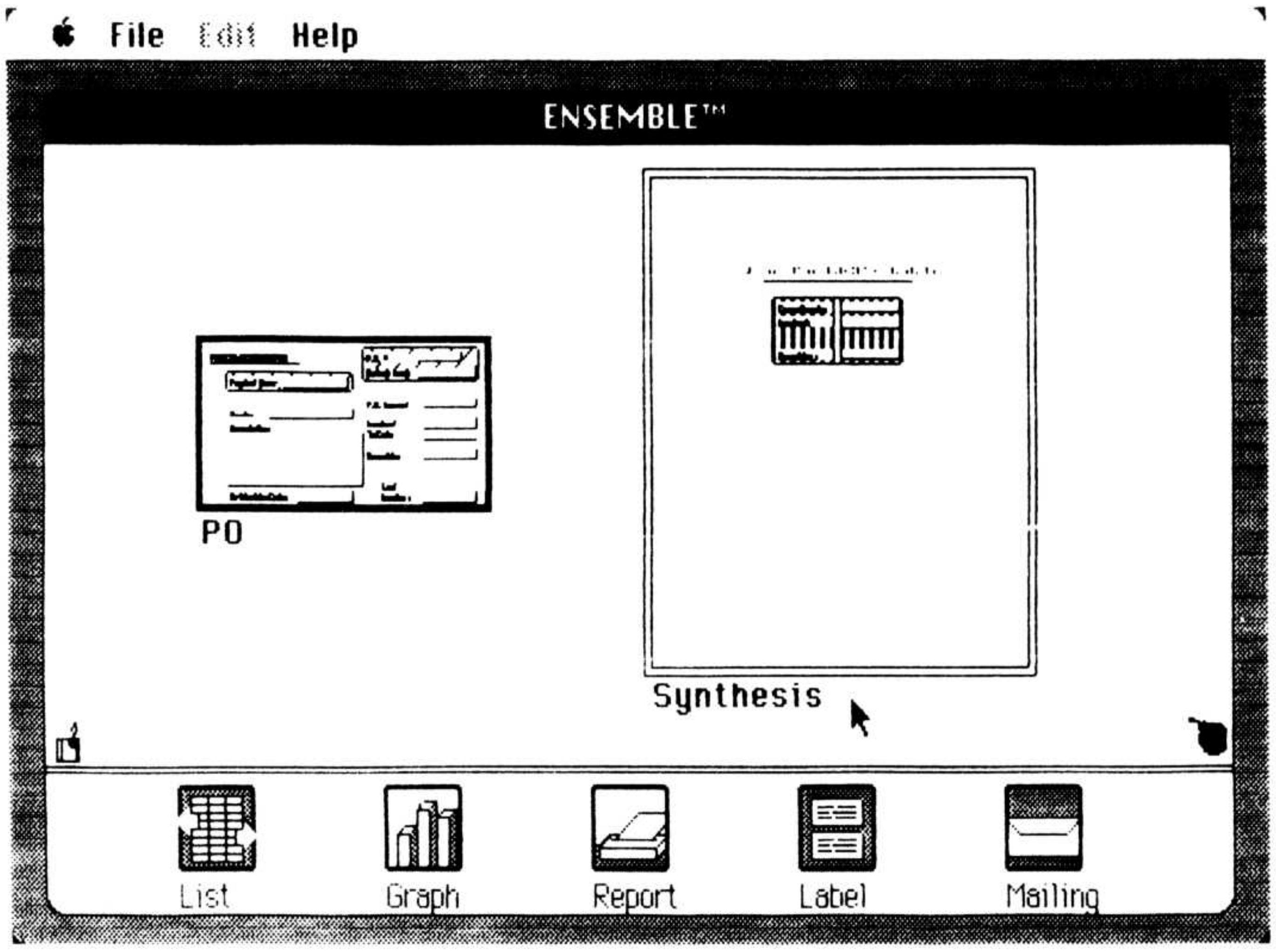


Now you can save the fully updated PO record to disk using the SAVE icon.

Generating the Synthesis Report

With Ensemble it is easy to glean summary information from your files. You simply need to set up a specific report file that will be sent summary information.

Open the Synthesis and PO files available on your Examples disk.



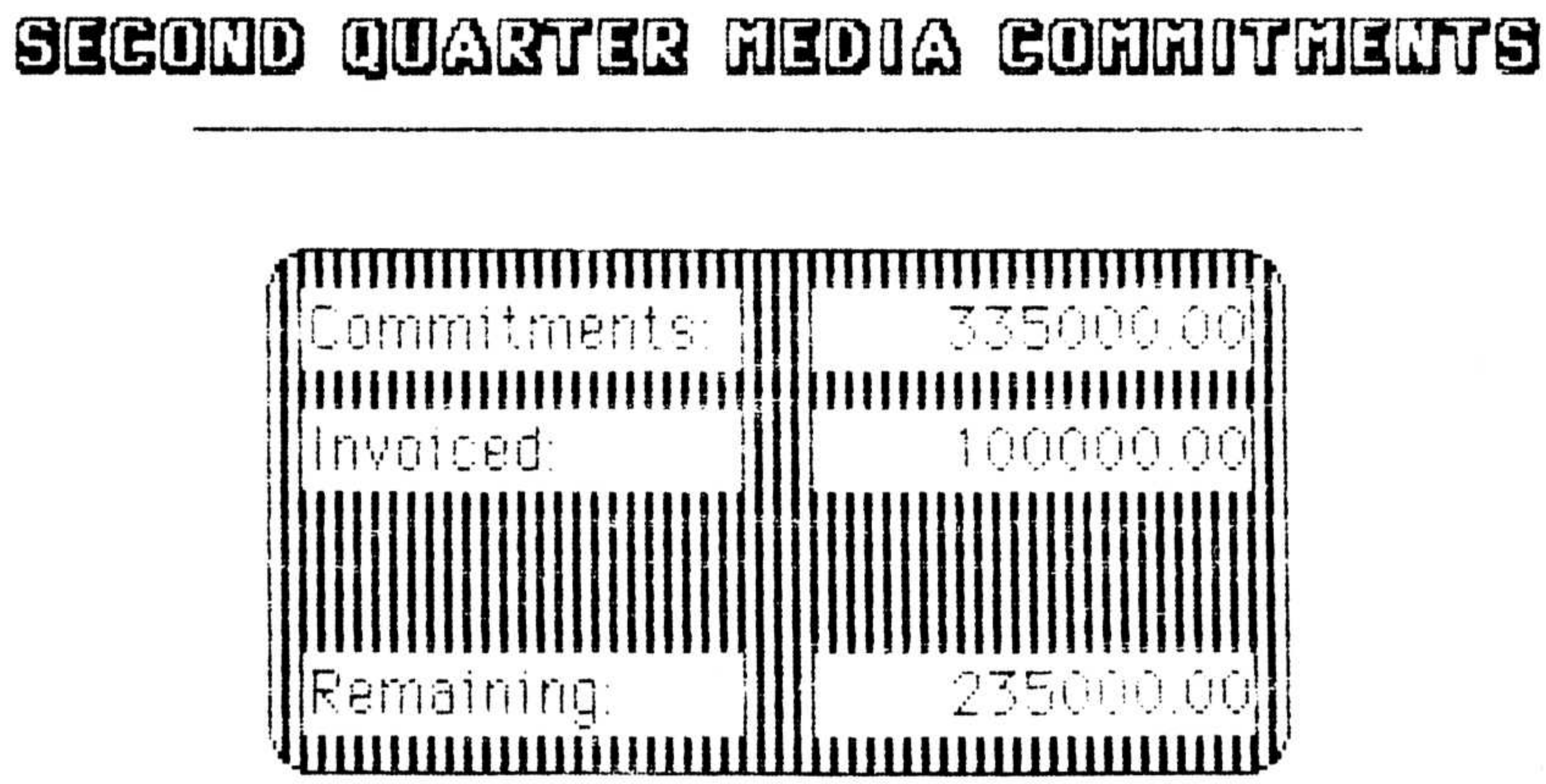
The Report "File"

The Synthesis file will act as the output or report file, and the PO file will provide the input. The Synthesis file is in fact a very simple form containing three fields:

a) *rep-commit:* A field that will accumulate PO amounts from selected records.

b) *rep-invoice:* A field that will accumulate invoiced-to-date amounts from selected records.

c) *rep-remain:* A field that will accumulate the "remaining monies" from selected records.



You can custom design your synthesis form to suit your needs—just as you would any Ensemble form.

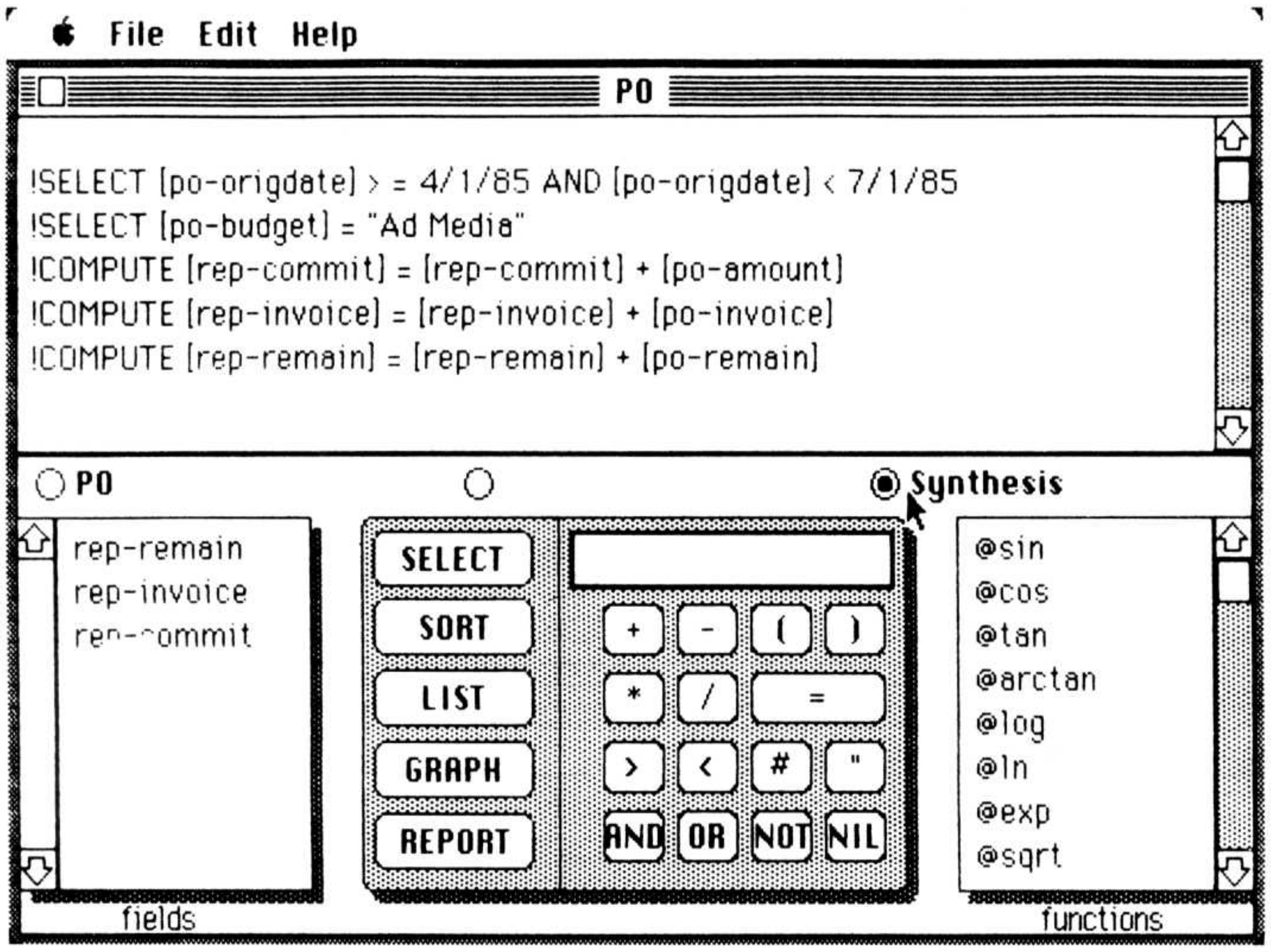
How to Specify

When preparing a synthesis report, all specifications and even computations are made within the Specifications Window of the input file.

In this example the PO file is the input file. You will generate a report that selects from the PO file:

- All expense commitments (i.e. PO amounts) for advertising media in the second quarter.
- Only those PO's generated in the second quarter.

As PO file records are read by the Ensemble system, values will be accumulated in the Synthesis file, via !COMPUTE statements. The Synthesis file remains as one open record on the Ensemble Desktop.

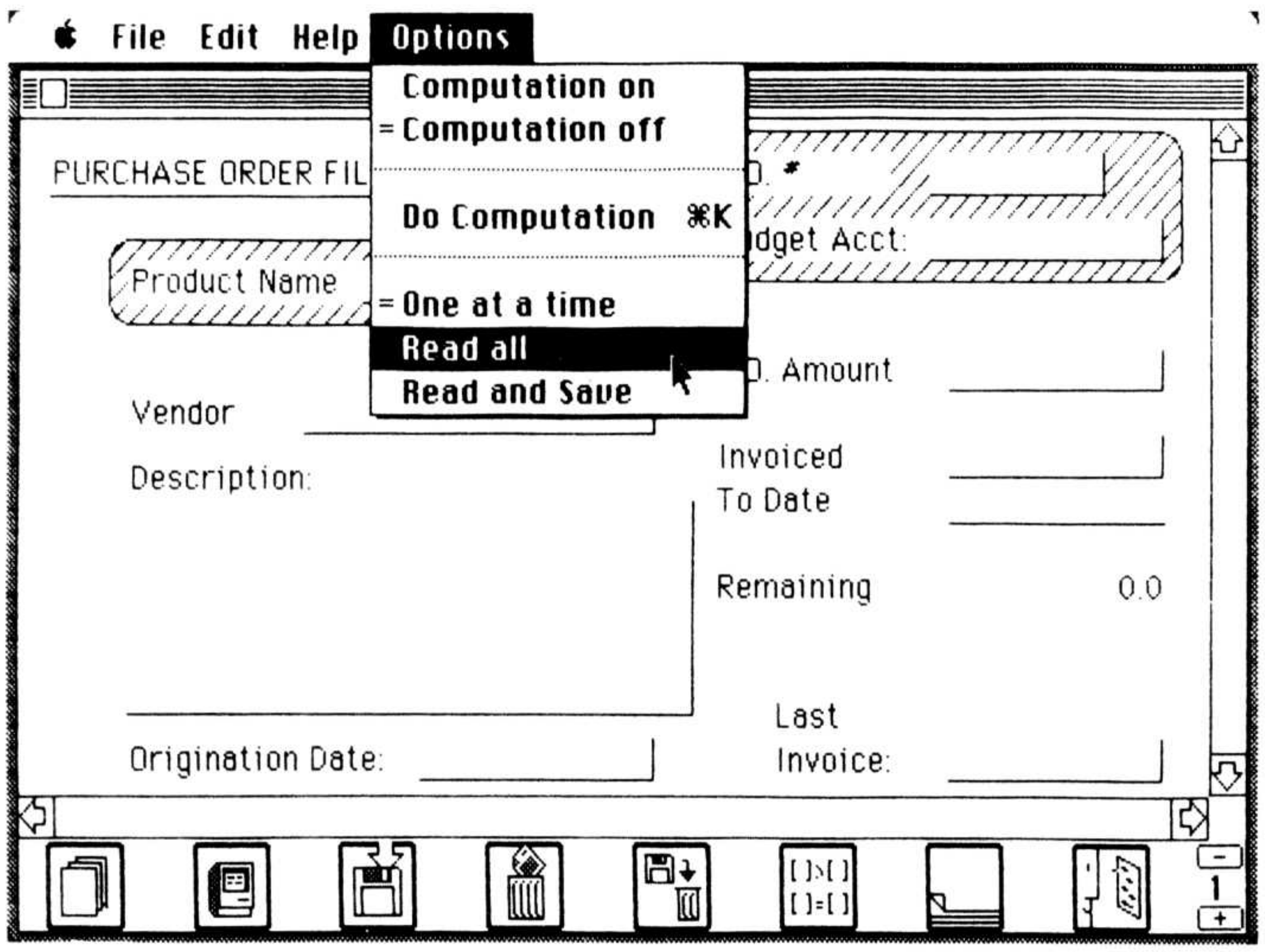


Note that the !COMPUTE command must be typed — since it is not available as a menu item. Keep in mind that all Computation Window commands are available for your use in the Specifications Window. But, they must be typed.

Using "Read All"

In order to instruct Ensemble to read through an entire file continuously:

- Select READ ALL then click the PERFORM icon.



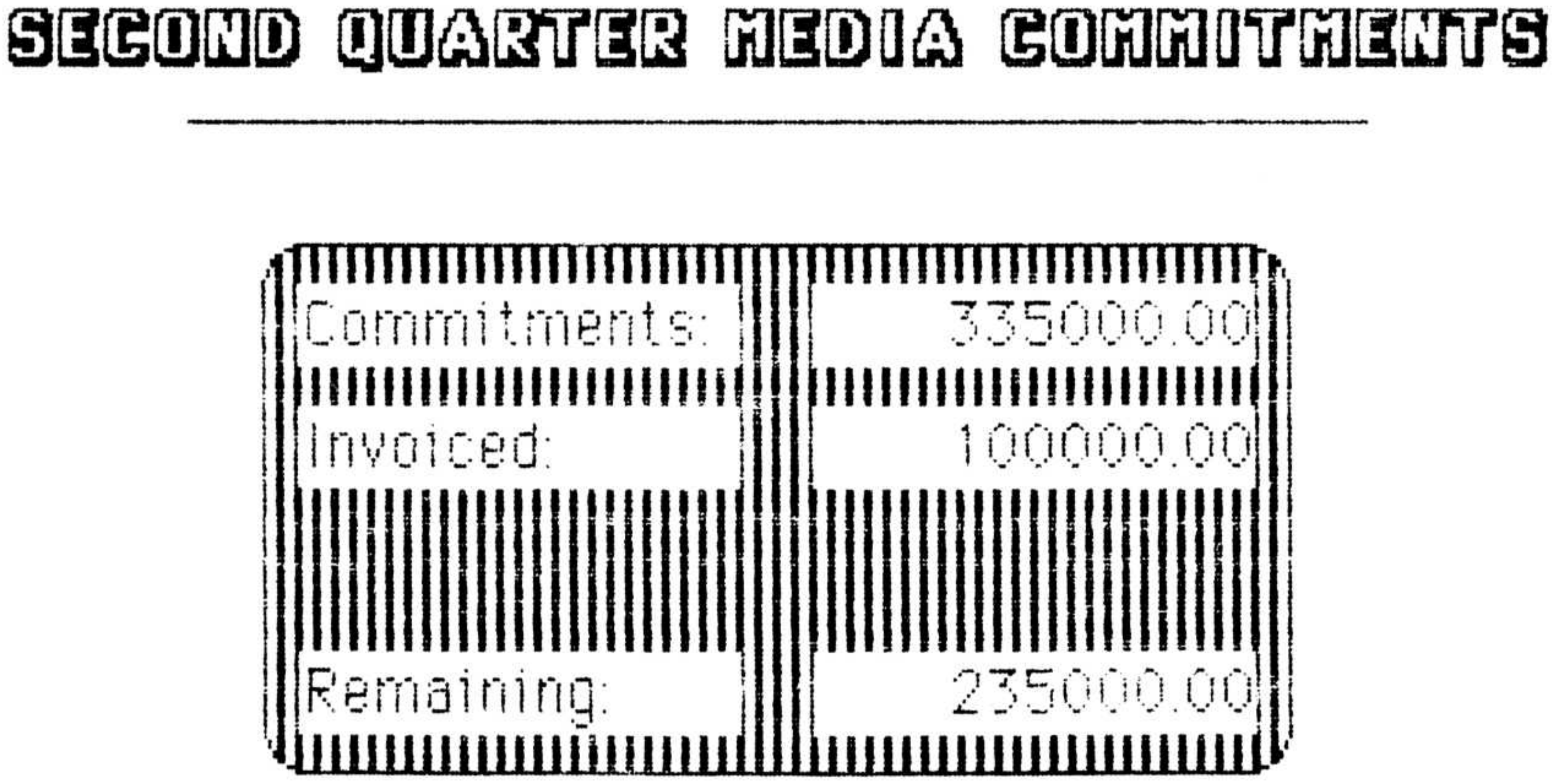
Ensemble will read through all the records of the PO file without filling the on-screen form. As it does so, it will perform your indicated specifications for each record. Thus a specification such as...

!COMPUTE [*rep-commit*] = [*rep-commit*] + [*po-amount*]

takes the PO amount *(po-amount)* of each selected PO record and adds it to the previous value of the commitments field *(rep-commit)* on the Synthesis file. In this manner, *rep-commit* acts as an accumulator for all PO amounts.

The Synthesis Report

The Synthesis file will contain updated values when the PERFORM icon is no longer highlighted. You can then print the Synthesis file, using the PRINT command available in the FILE menu on the Ensemble Desktop.

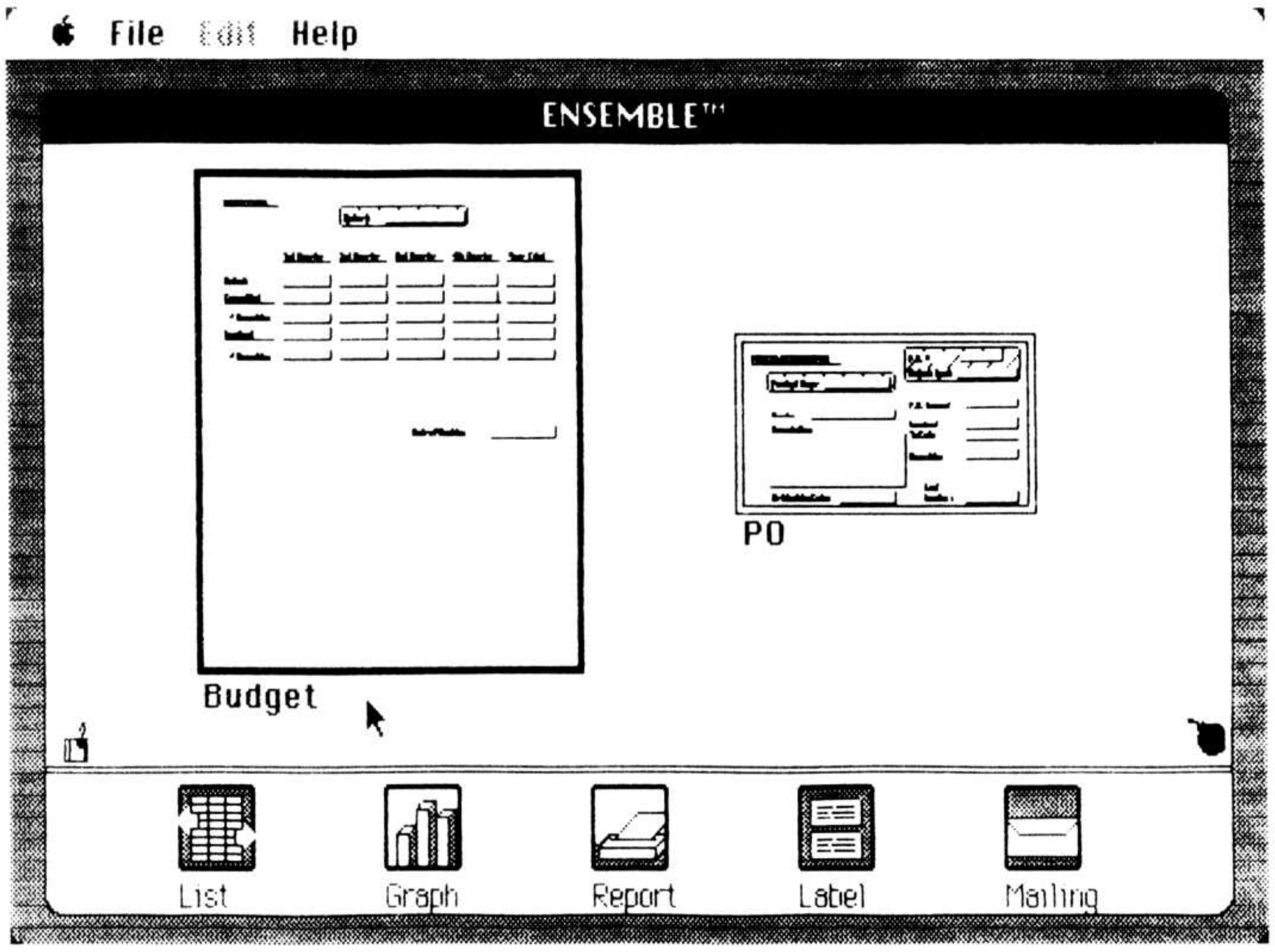


In addition, you can save the Synthesis record by clicking the SAVE icon.

Update the Budget File With the Purchase Order File

You have seen how invoice data can be used to update the PO file. Similarly, at any time, the PO file can update the Budget file.

Open the PO file and Budget file provided on your Examples disk.

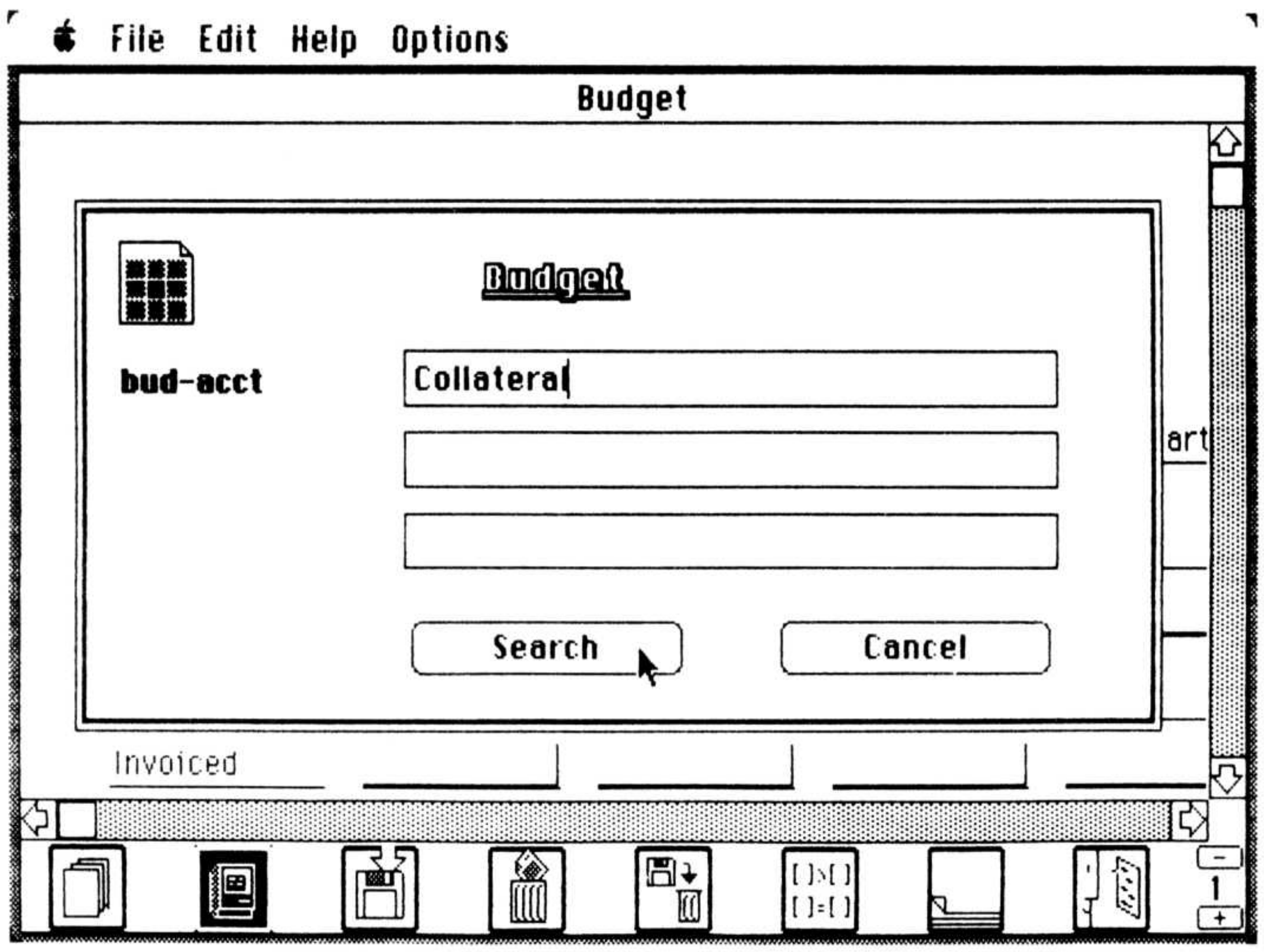


Match Files With Quick Retrieval

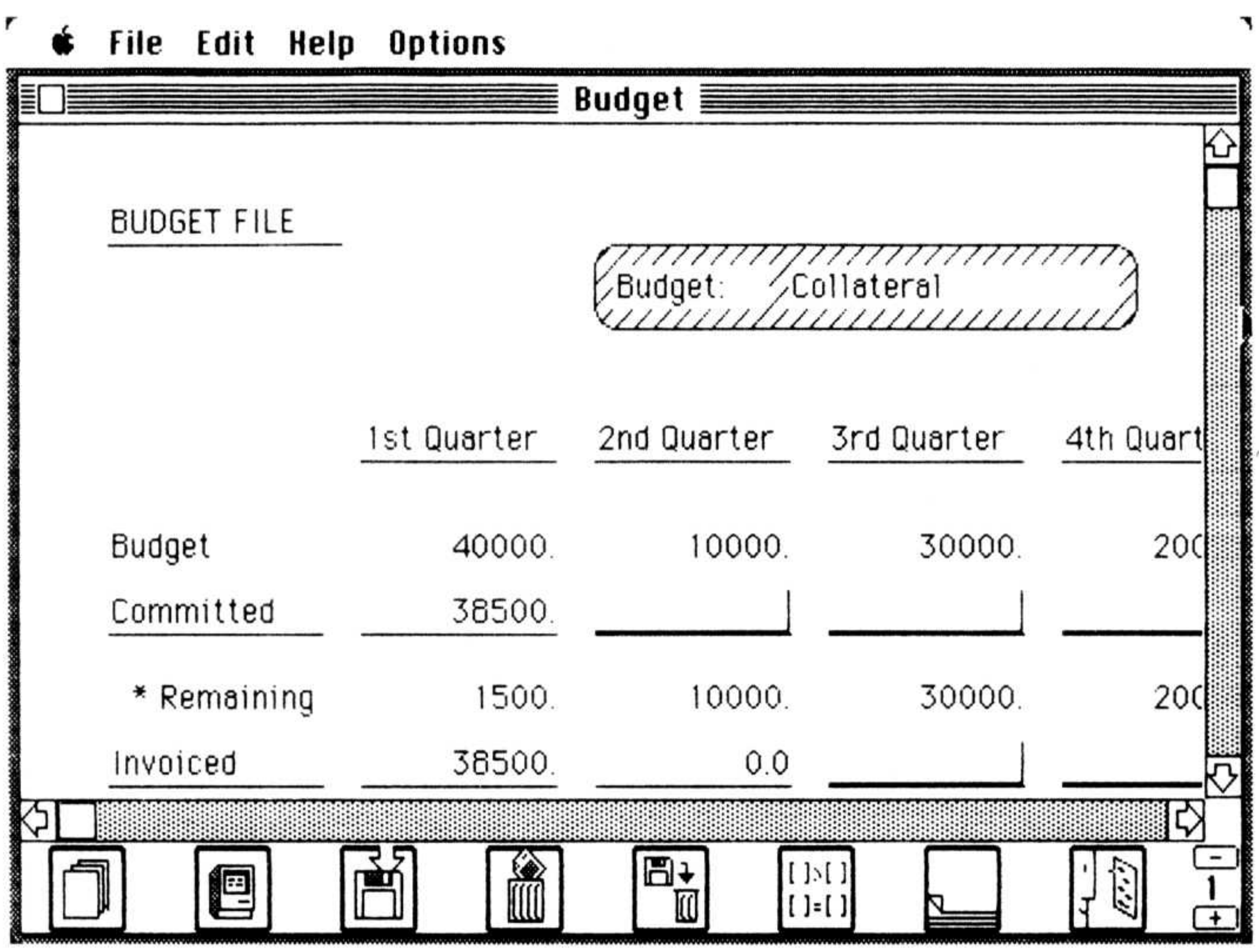
You must first decide which Budget record you want to update. In this example, you will update the Collateral record in the Budget file.

- Click the SEARCH icon from the Entry Window of PO file.

- A dialog box appears asking you to input the search criteria. (Note that *bud-acct* has already been set up as an access key field).
- Input the account name, Collateral.



The screen fills with the retrieved Collateral Budget record...

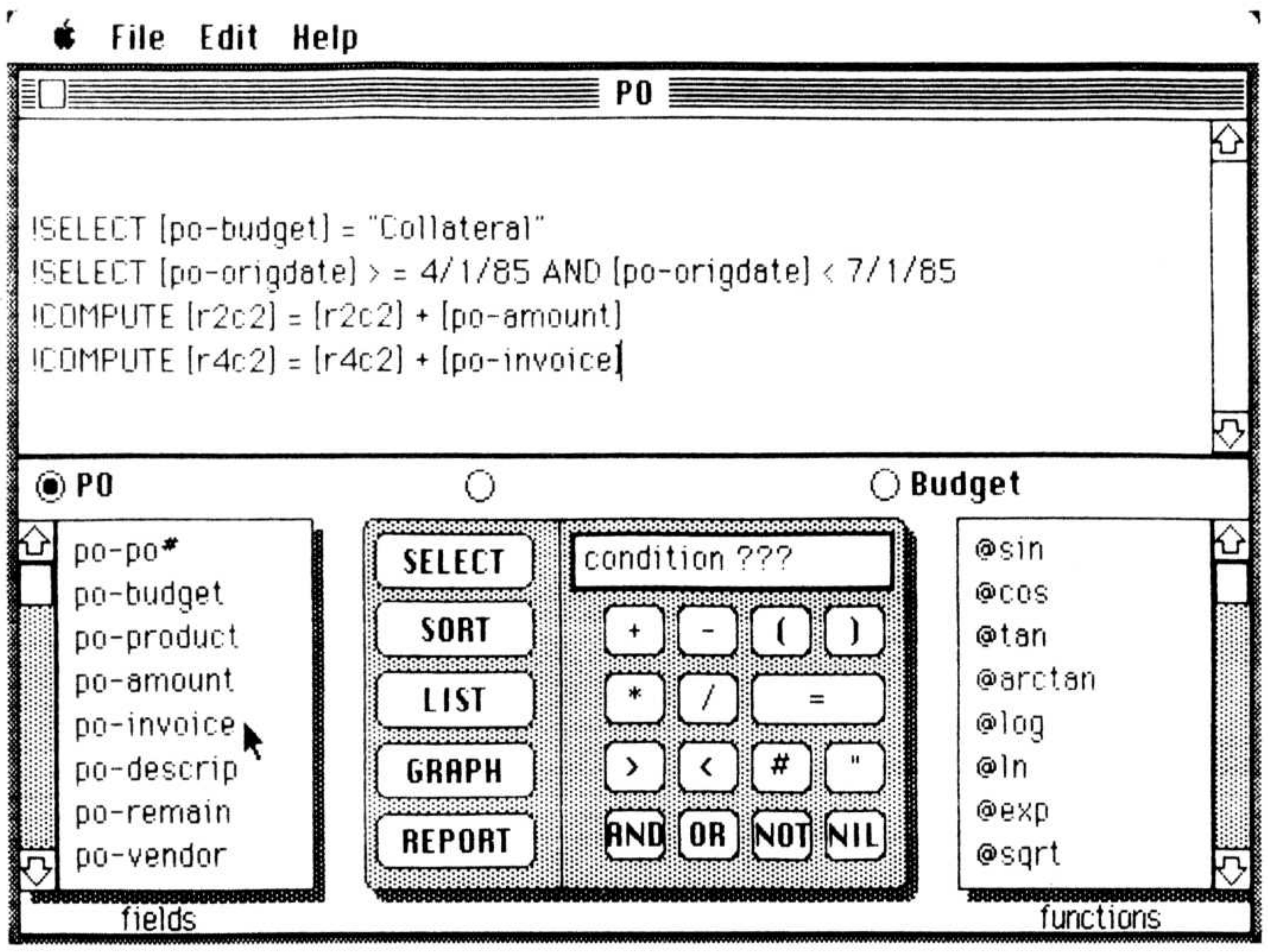


How to Specify and Establish Data Flow

- Click the close box to return to the Ensemble Desktop.
- Now move to the Entry Window of PO file, and click the SPECIFY icon to proceed to the Specifications Window.

In the Specifications Window you will make the Specifications that provide the guidelines for updating the Collateral record, which you have left open on the Desktop. The specifications are:

- Select only those PO records that reference the Collateral budget account and that were originated in the second quarter.
- Accumulate all PO amounts into the *r2c2* field, which is the second quarter commitments field on the Budget record.
- Accumulate all PO invoice amounts into the *r4c2* field, which is the second quarter invoiced-to-date field on the Budget record.



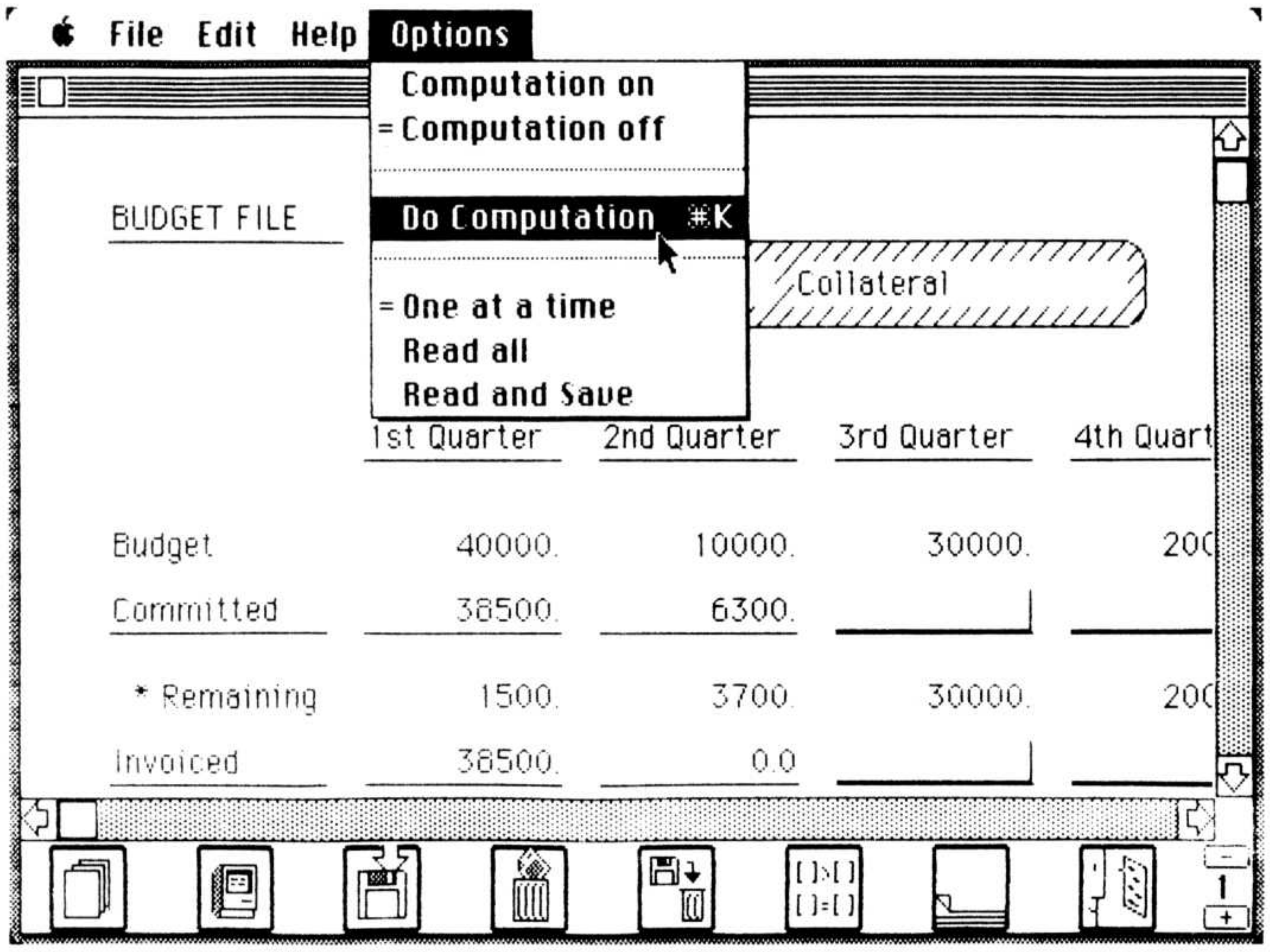
Making the Update

Once the specifications are made:

- Click the close box to return to the Entry Window.
- Select READ ALL from the OPTIONS menu.
- Then click the PERFORM icon.

The Budget file will be updated when the PERFORM icon is no longer highlighted.

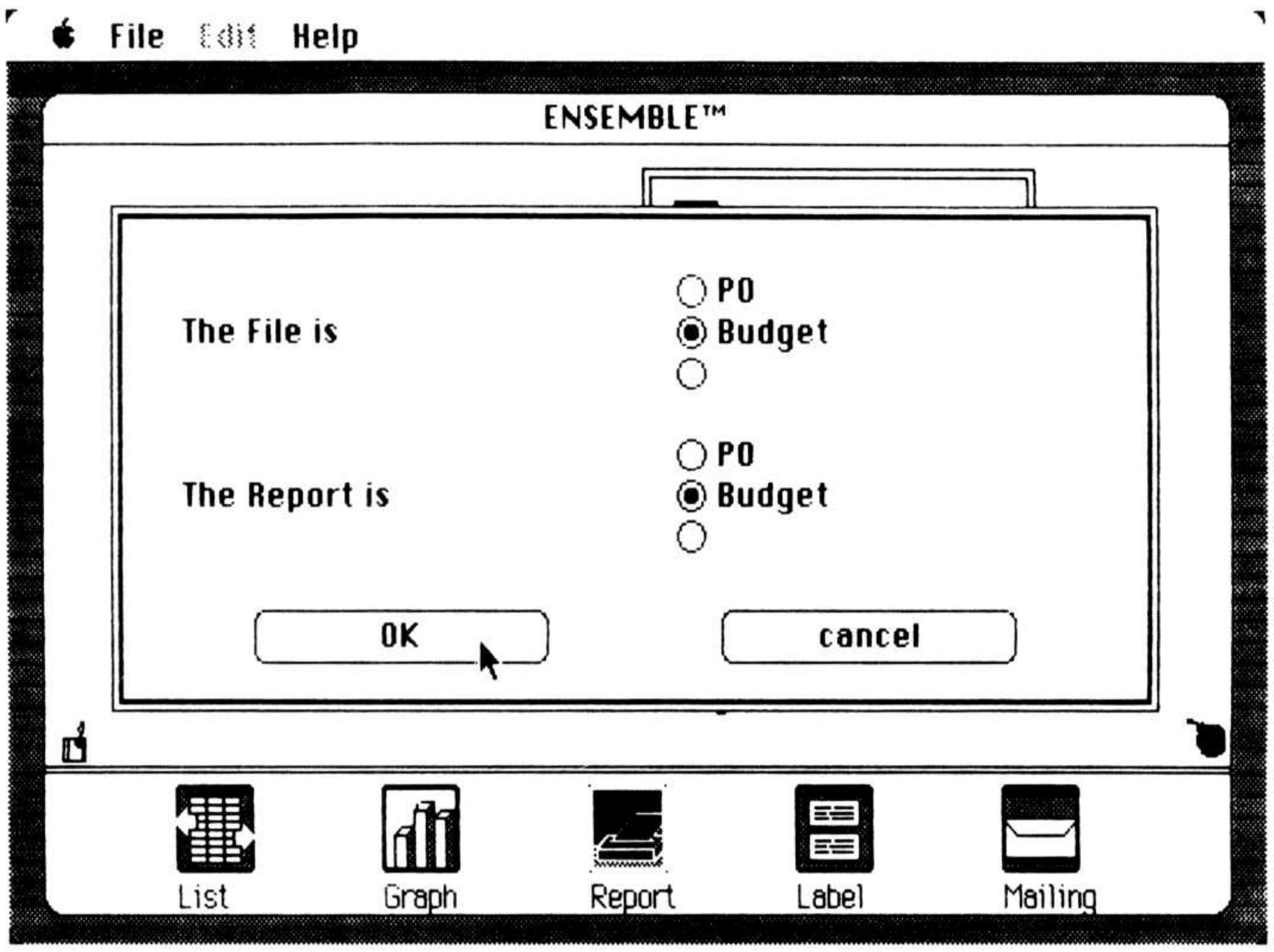
Move to the Entry Window of the Budget file to confirm the update was made. Select DO COMPUTATION to execute the calculation for the fields defined as "Remaining". At your option, you can insert the current date into the record to mark the update activity.



Save the updated Budget record by clicking the SAVE icon.

Using the Desktop Report Icon

Ensemble allows you to print reports from the Desktop. When you double-click the REPORT icon, a dialog box appears that asks you to specify a File (input) and a Report (output).



The input and output files can be one and the same. If they are to be differ ent files, you must first create the output file using the Ensemble Design Window. Details on how to customize a multi-media report — with headers, footers, title page, and summary page — are discussed in the Ensemble User Manual in the section entitled, "Creating and Printing Reports".

Use the Ensemble Desktop REPORT icon when you want to print out file records in a different or decorative format, with calculations that transform data before it is printed (such as printing an invoice from a customer order), or with input from a single record of a third file that is open on the Desktop.

If you want to sort, make selections, or perform calculations that transfer data between the input file and the output file, these instructions must be indicated in the Specifications Window of the Input File.

The Collateral Budget record is shown below as it would be printed using the Ensemble REPORT icon. To do this yourself:

- Simply issue a !SELECT [*bud-acct*] = "Collateral" statement in the Specifications Window of the Budget file.
- Then, using the Desktop REPORT icon, make sure you specify the Budget file as both input and output.

BUDGET FILE

Budget: Collateral

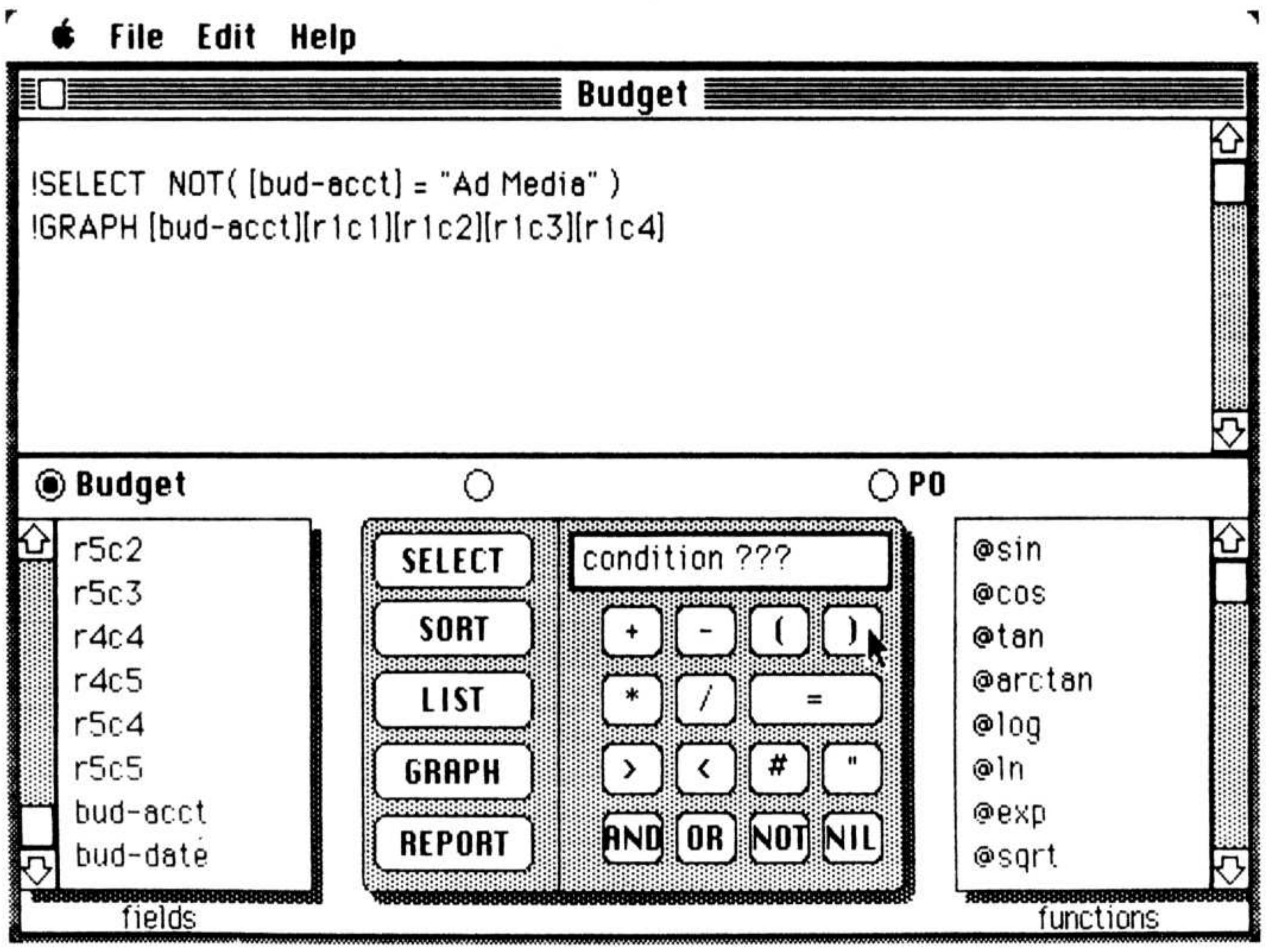
	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Year Total
Budget	40000.	10000.	30000.	20000.	100000.
Committed	38500.	6300.			44800.
* Remaining	1500.	3700.	30000.	20000.	55200.
Invoiced	38500.	0.0			38500.
* Remaining	0.0	6300.	0.0	0.0	6300.

Date of Update: 5/20/85

Graphing Budget Information

It is very easy to cull information from a file and send it to the graph. From the Specifications Window of the Budget file select !GRAPH along with the fields you wish to see graphed.

How to Specify



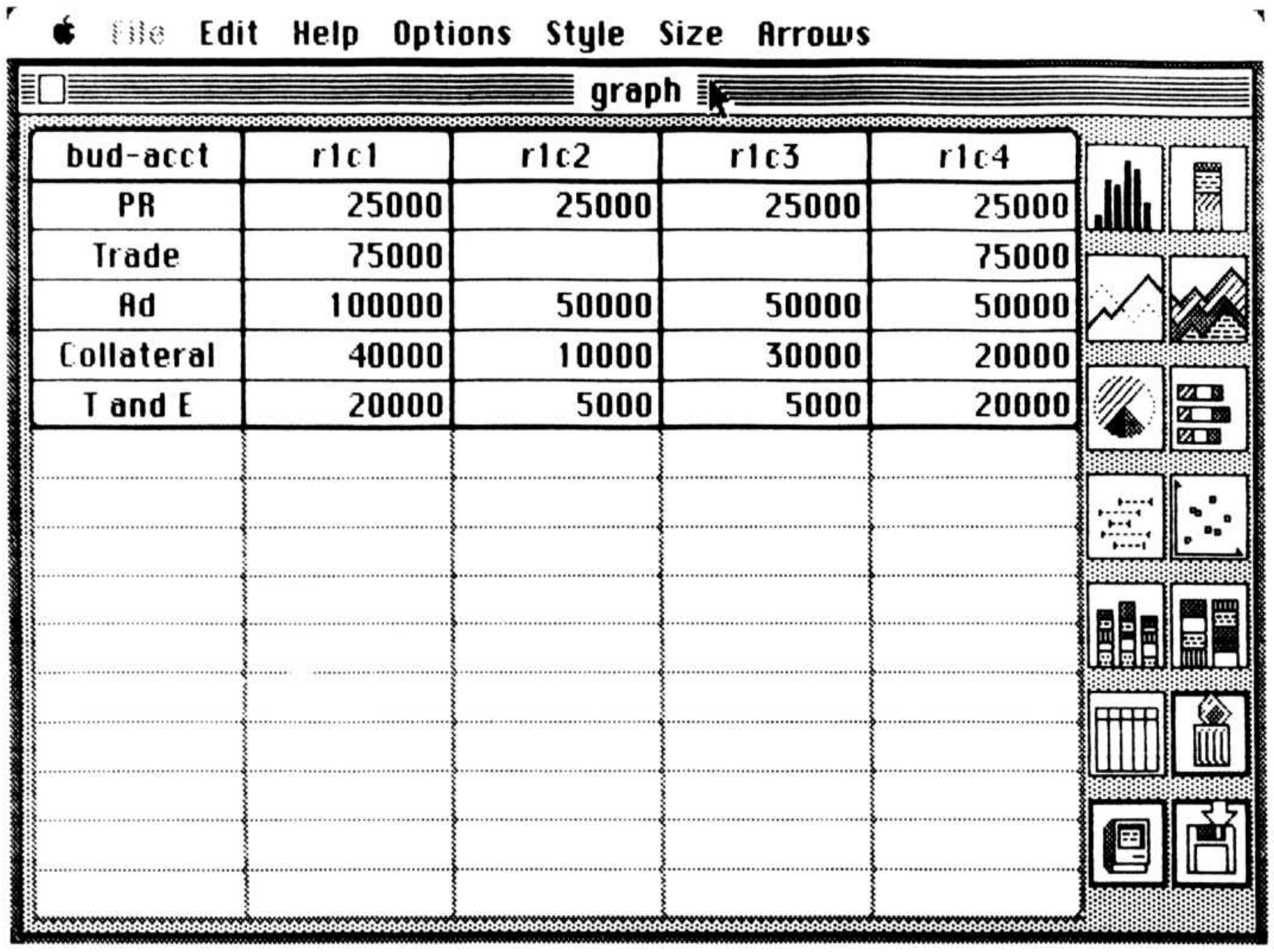
In this example, we suggest that you issue a !SELECT command to pass over the Ad Media budget record, but access the entire remaining file. The Ad Media budget is so much greater that the other expense budgets that it will visually overpower the others in a graph or chart.

The first field specified after the !GRAPH command is an alphanumeric field that will define the row titles of the graph table. The next four fields (and you can specify up to four) should be numeric. These numeric fields represent the data to be graphed. In the example above, you are retrieving the quarterly budget figures (*r1c1, r1c2, r1c3, r1c4*) for each Budget record.

- Click the close box to move to the Entry Window of the Budget file.
- Click the PERFORM icon.

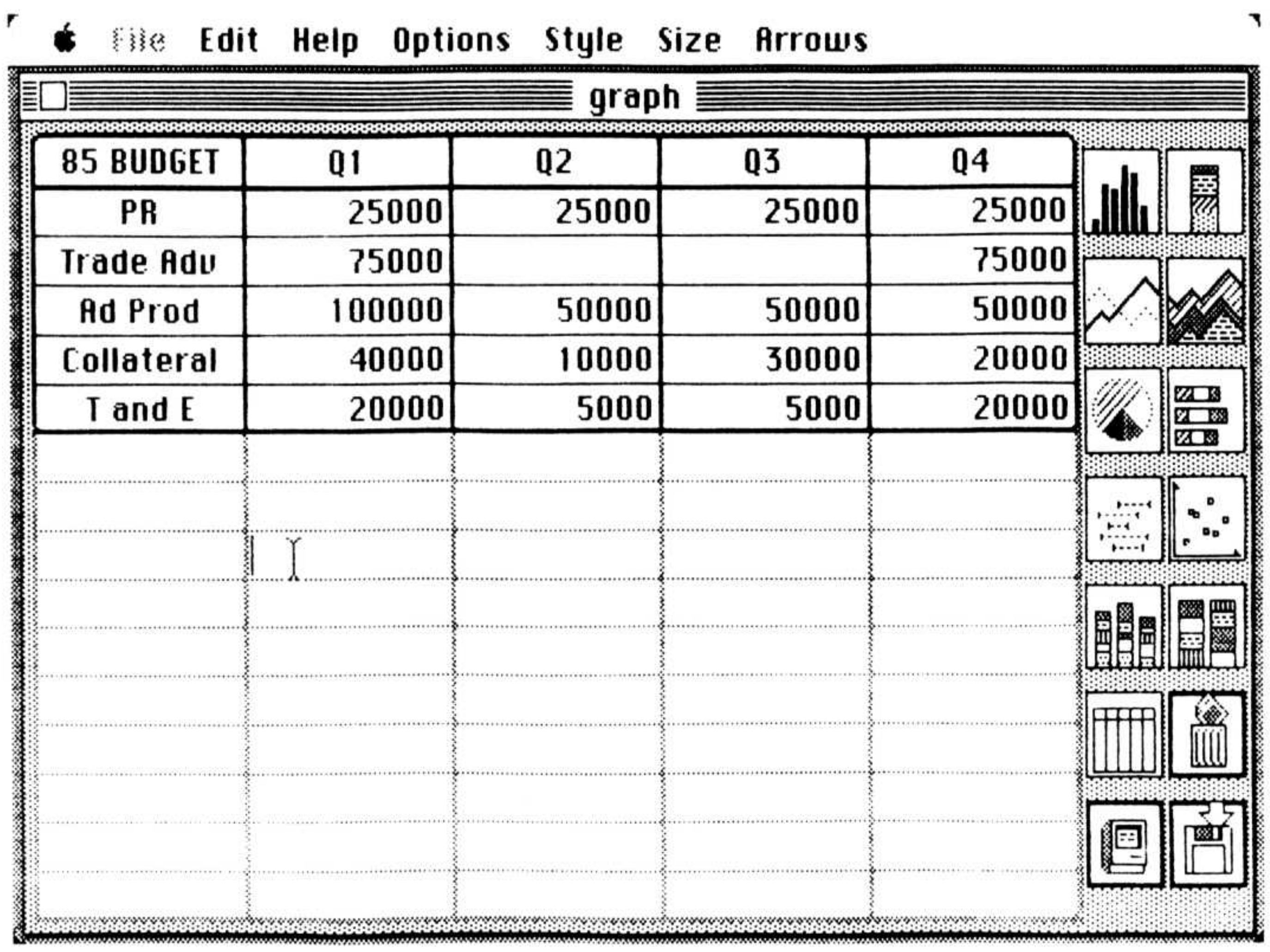
The Graph Table

Ensemble will automatically transfer you to the Graph Window where a table will be constructed based on your previously made specifications.



bud-acct	r1c1	r1c2	r1c3	r1c4
PR	25000	25000	25000	25000
Trade	75000			75000
Ad	100000	50000	50000	50000
Collateral	40000	10000	30000	20000
T and E	20000	5000	5000	20000

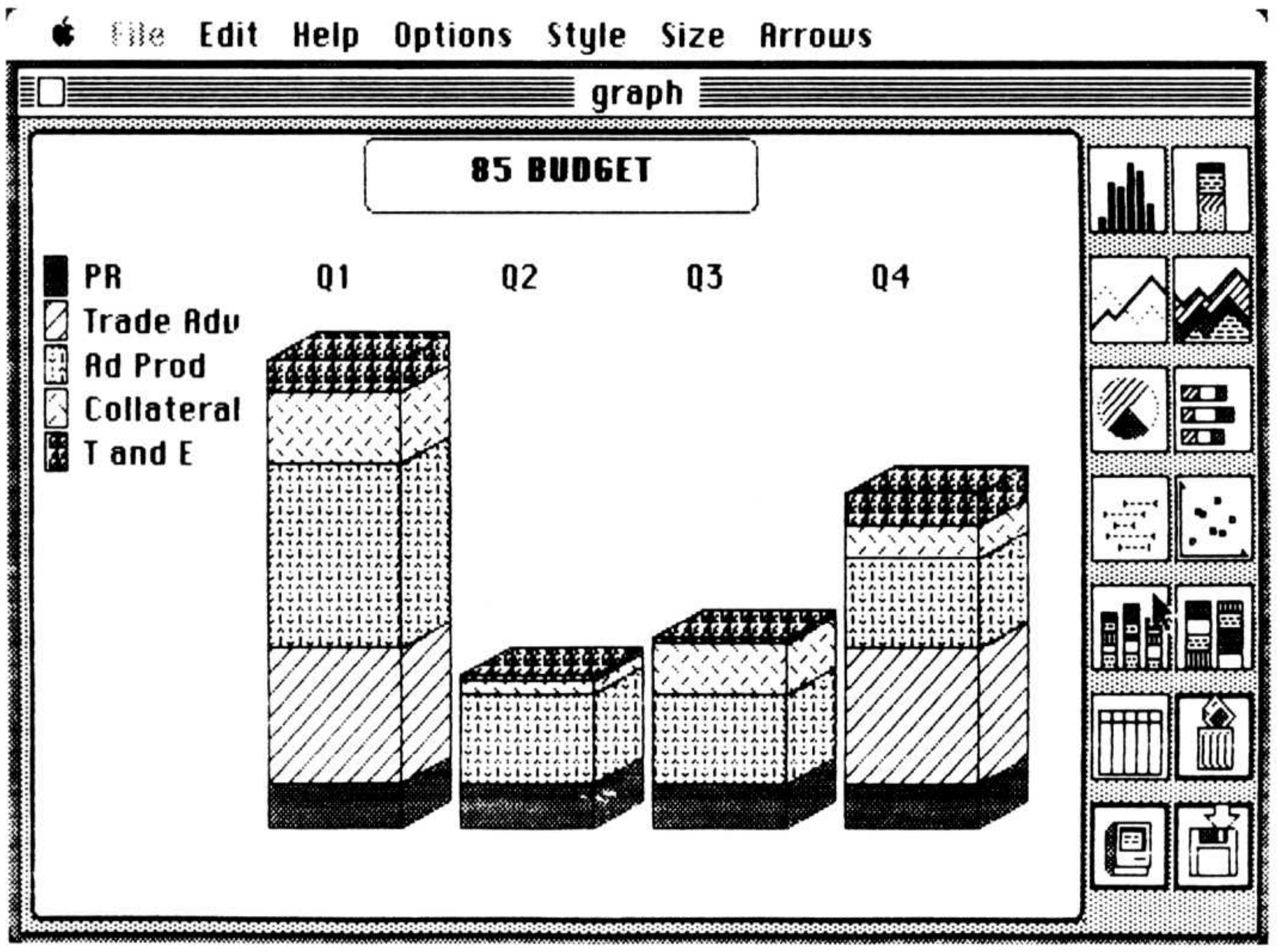
Before you generate graphs, you will want to edit the row titles and column headings of the graph table to take on greater meaning. By clicking the mouse on the left side of a table entry, you can type in new descriptions, as shown below:



85 BUDGET	Q1	Q2	Q3	Q4
PR	25000	25000	25000	25000
Trade Adv	75000			75000
Ad Prod	100000	50000	50000	50000
Collateral	40000	10000	30000	20000
T and E	20000	5000	5000	20000

The Graph

Now you can select from the graph icons to the right of the Graph Window to generate your charts and graphs. In this example, 3D was selected from the OPTIONS menu and a bar chart icon was clicked that shows the relative size of the budget categories by quarter.



Integrating Text and Graphics

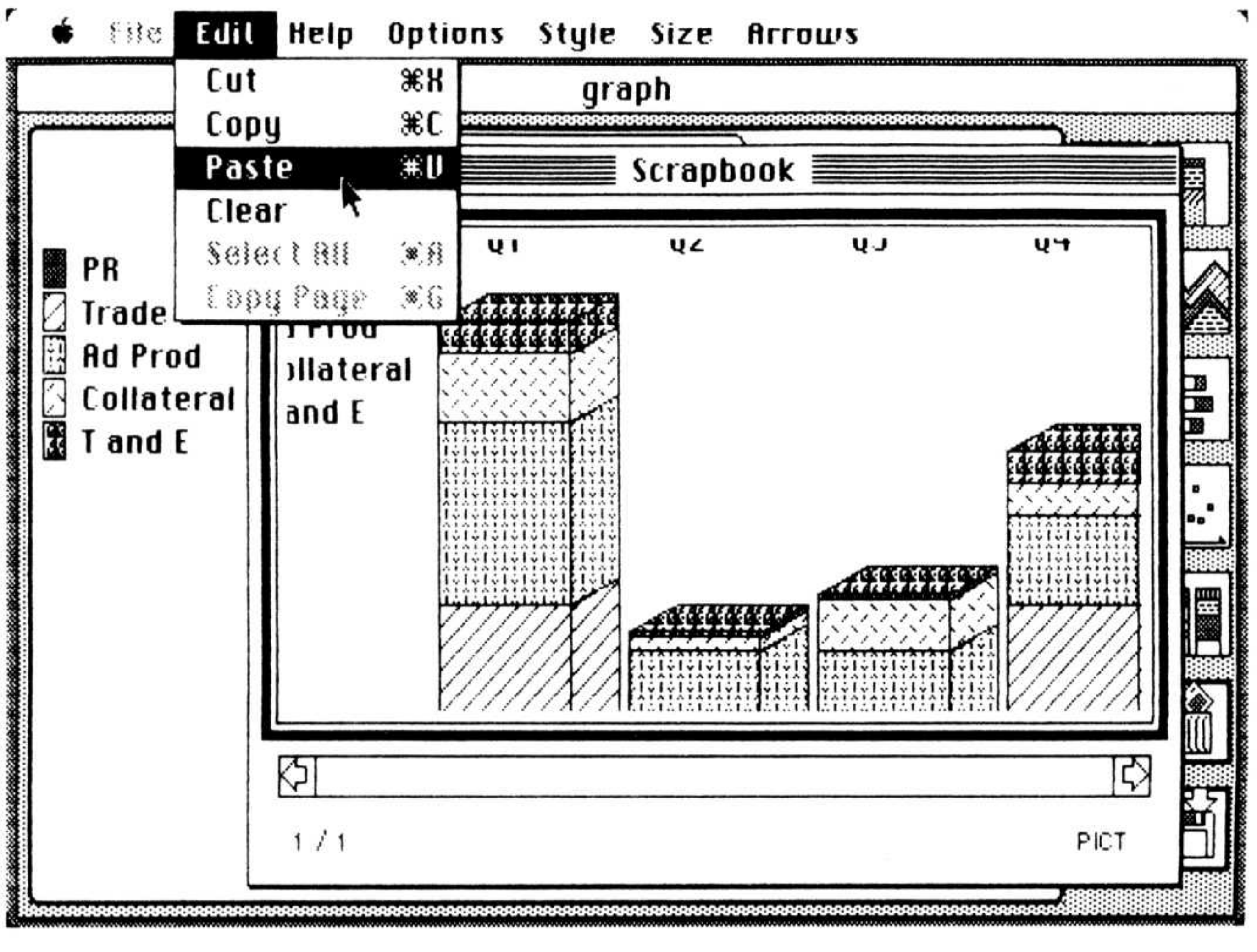
Ensemble allows you to transfer graphs, lists, forms, documents, as well as MacWrite and MacPaint images via the EDIT menu. The graph generated above can be integrated into a memo or letter by using one of two techniques:

- One choice is to pass the graph into the clipboard by selecting COPY from the EDIT menu.
- Since you may want to use the clipboard for some other purpose before you have a chance to PASTE the graph into your text document, you can store the graph in the SCRAPBOOK.

In this example, you will use the SCRAPBOOK.

Copying the Graph

- From the Graph Window with the Graph image formed, select COPY from the EDIT menu.
- Open the SCRAPBOOK in the APPLE menu.
- Using the mouse, click the pointer in the SCRAPBOOK window.
- Select PASTE from the EDIT menu.



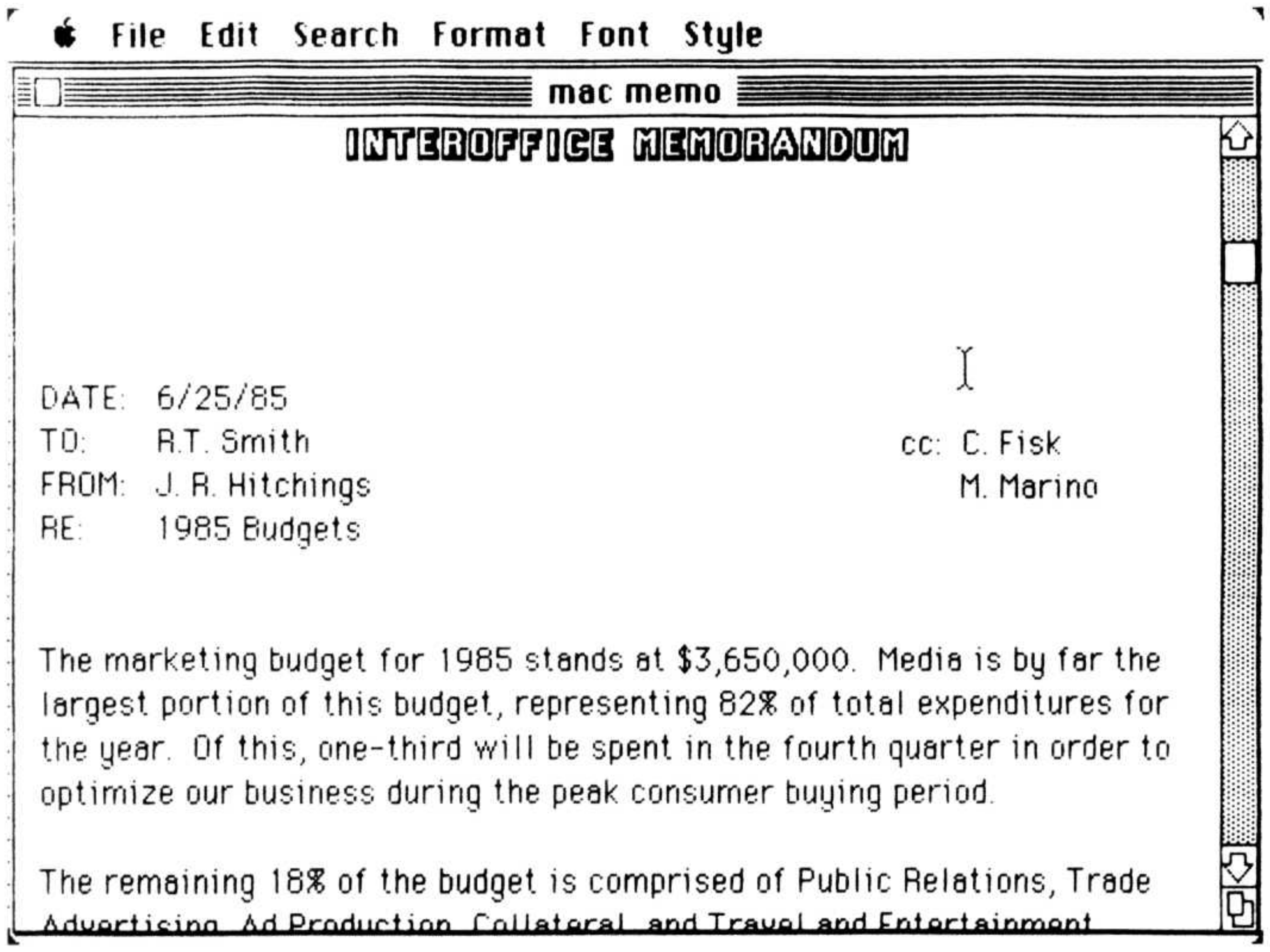
The SCRAPBOOK will fill with the image of the graph. Click the close box on the SCRAPBOOK to complete the process.

Creating the Memo

You have several choices in creating memos and letters with Ensemble. You can use Ensemble's on-board word processor, you can pass in a document from MacWrite, or use both.

In this example you will use both...

Using MacWrite, create a letter that looks something like this:



The text represents roughly a half-page of information.

With MacWrite

- Using the COPY command from the MacWrite EDIT menu, save the text to the clipboard.
- Then QUIT MacWrite and eject the disk (while leaving the MacWrite disk icon on the Macintosh Desktop).

With Ensemble:

- Boot up Ensemble and create a NEW file defined as US Letter size.
- In the Design Window create a static text area covering the top-half of the page.
- In sequence, click the PASTE-UP icon, the static text area you created, and select PASTE from the EDIT menu.

Your MacWrite text is automatically inserted into your new Ensemble form. The MacWrite fonts will be changed to the Ensemble font. You can now re-edit the text as needed using the Ensemble word processor.

Underneath the text, define a static picture field to receive the graph image that you will next pass in.

Pasting the Graph

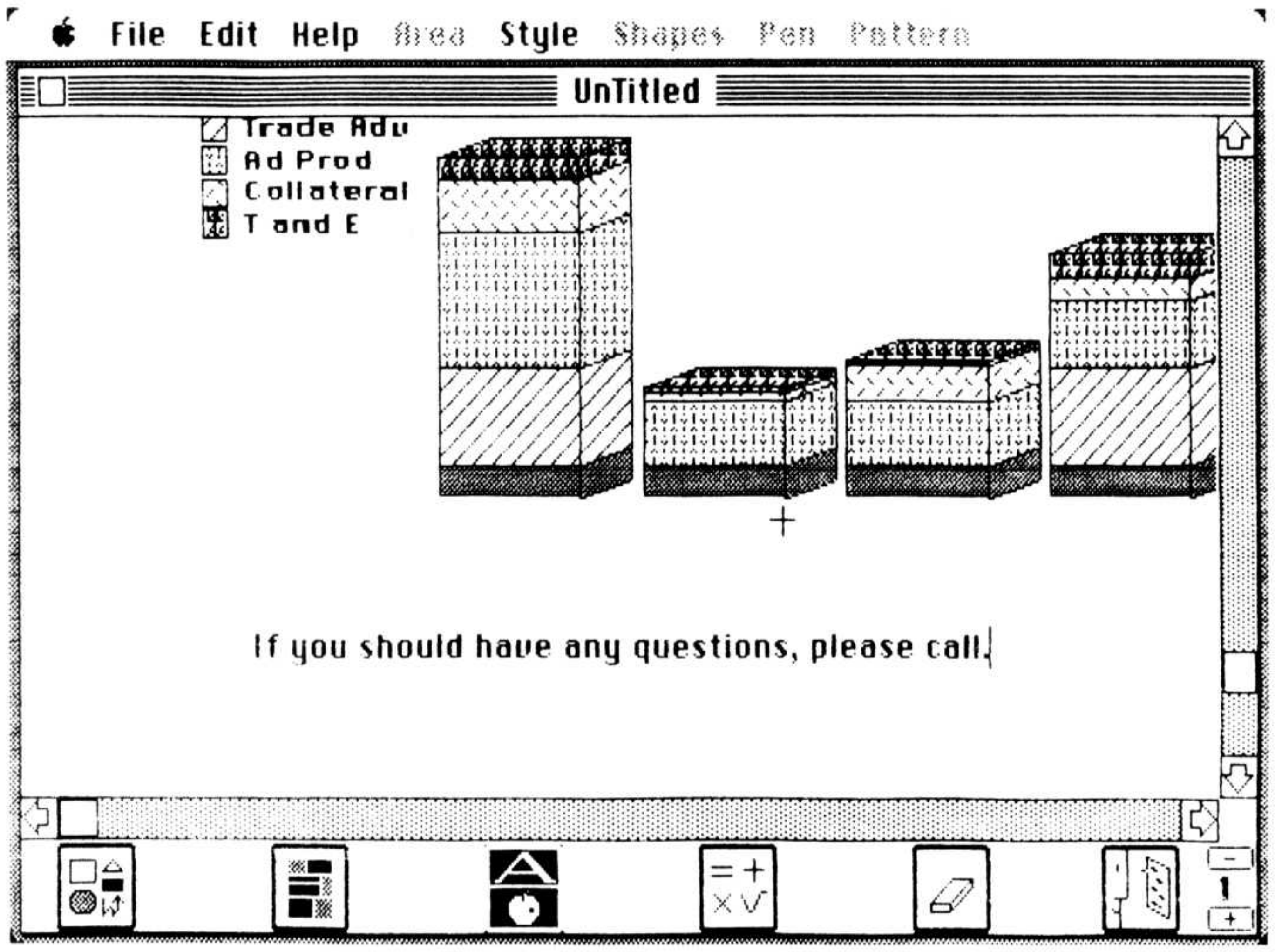
With the static picture field defined, take the following steps:

- Open the SCRAPBOOK in the APPLE menu.
- Select COPY from the EDIT menu.
- Click the SCRAPBOOK close box.
- Click the PASTE-UP icon and then select PASTE from the EDIT menu.

The Budget graph will appear in the static picture area.

A Finishing Touch

Underneath the graph image, add a static text field wherein you will type a closing message.



Return to the Ensemble Desktop where you can print out the memo using the PRINT command in the FILE menu.

INTEROFFICE MEMORANDUM

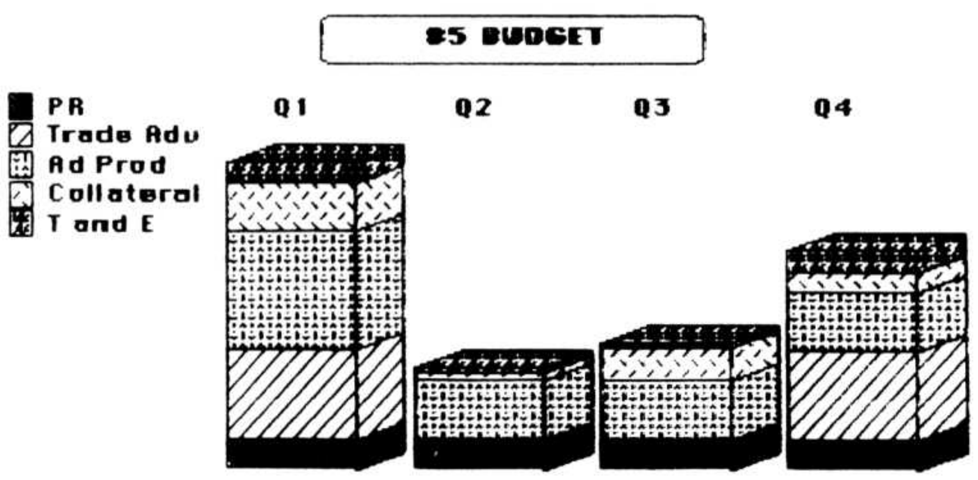
DATE: 6/25/85
TO: R.T. Smith
FROM: J. R. Hitchings
RE: 1985 Budgets

cc: C. Fisk
M. Marino

The marketing budget for 1985 stands at $3,650,000. Media is by far the largest portion of this budget, representing 82% of total expenditures for the year. Of this, one-third will be spent in the fourth quarter in order to optimize our business during the peak consumer buying period.

The remaining 18% of the budget is comprised of Public Relations, Trade Advertising, Ad Production, Collateral, and Travel and Entertainment expenses. The spending for these categories skews to the first quarter, which is when most of the preparation of ad and collateral materials will occur.

The chart below shows the quarterly spending pattern for all expenses except Media:



If you should have any questions, please call.

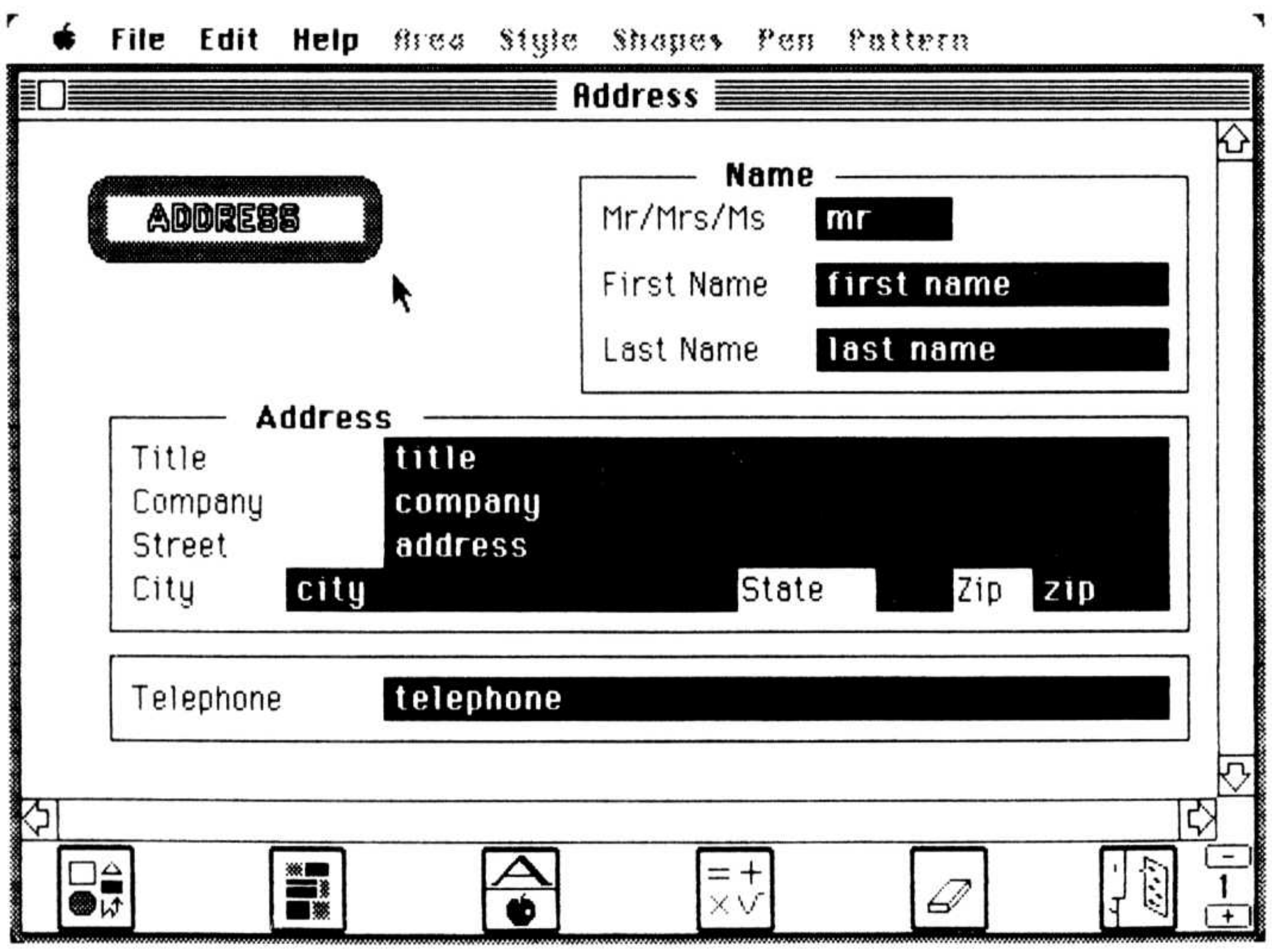
The Mail Merge

Ensemble makes it easy to conduct a mail merge.

From the Ensemble Desktop open the file called Address and the file called Letter that are provided on your Examples disk.

The Address File

Move to the Design Window of the Address file. Note the names of the various fields.



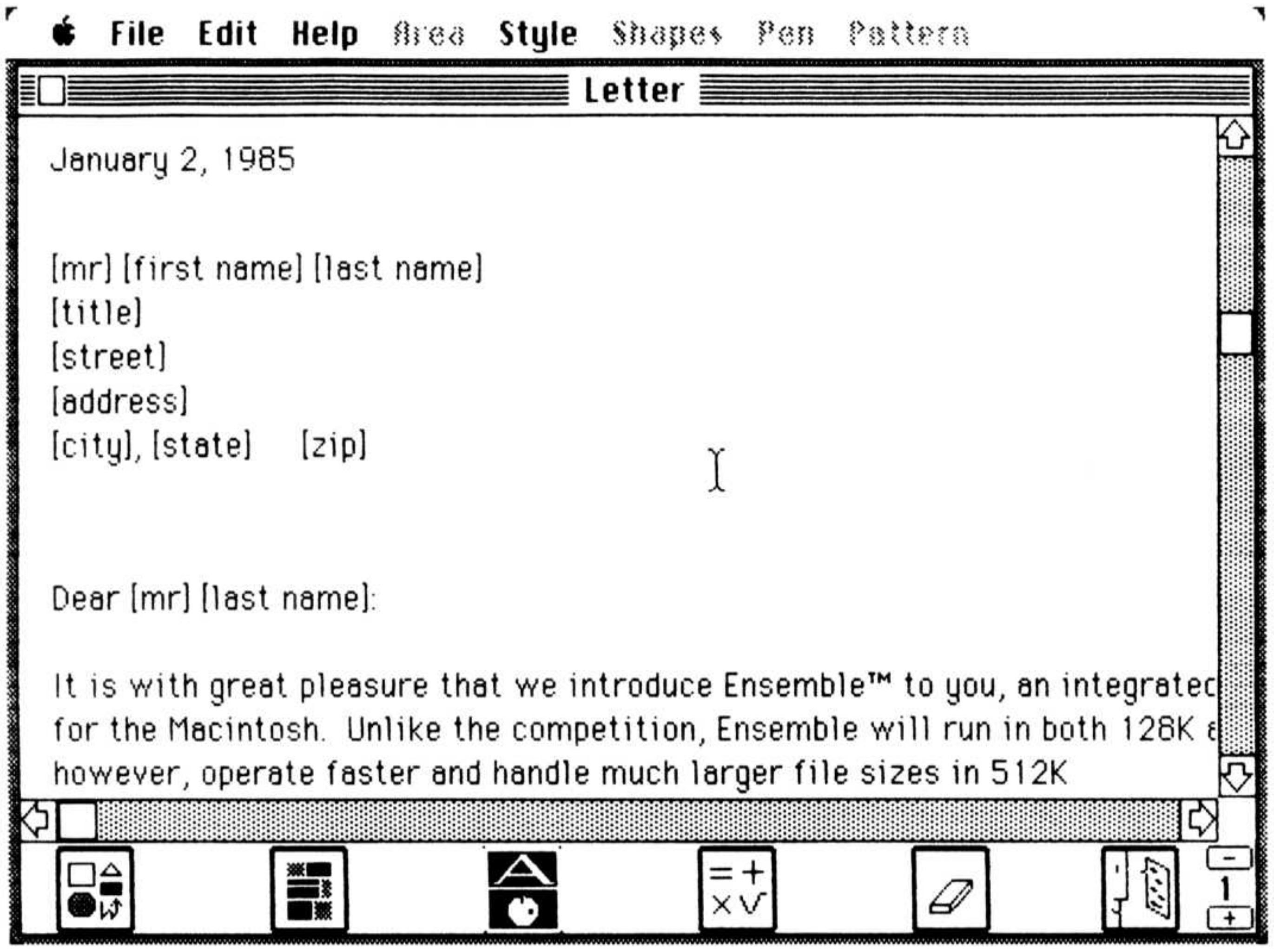
These field names will be used to send information to the letter.

The Letter File

Now move to the Design Window of the Letter file. Click the FIELD icon to see that different static text and picture areas have been set up.

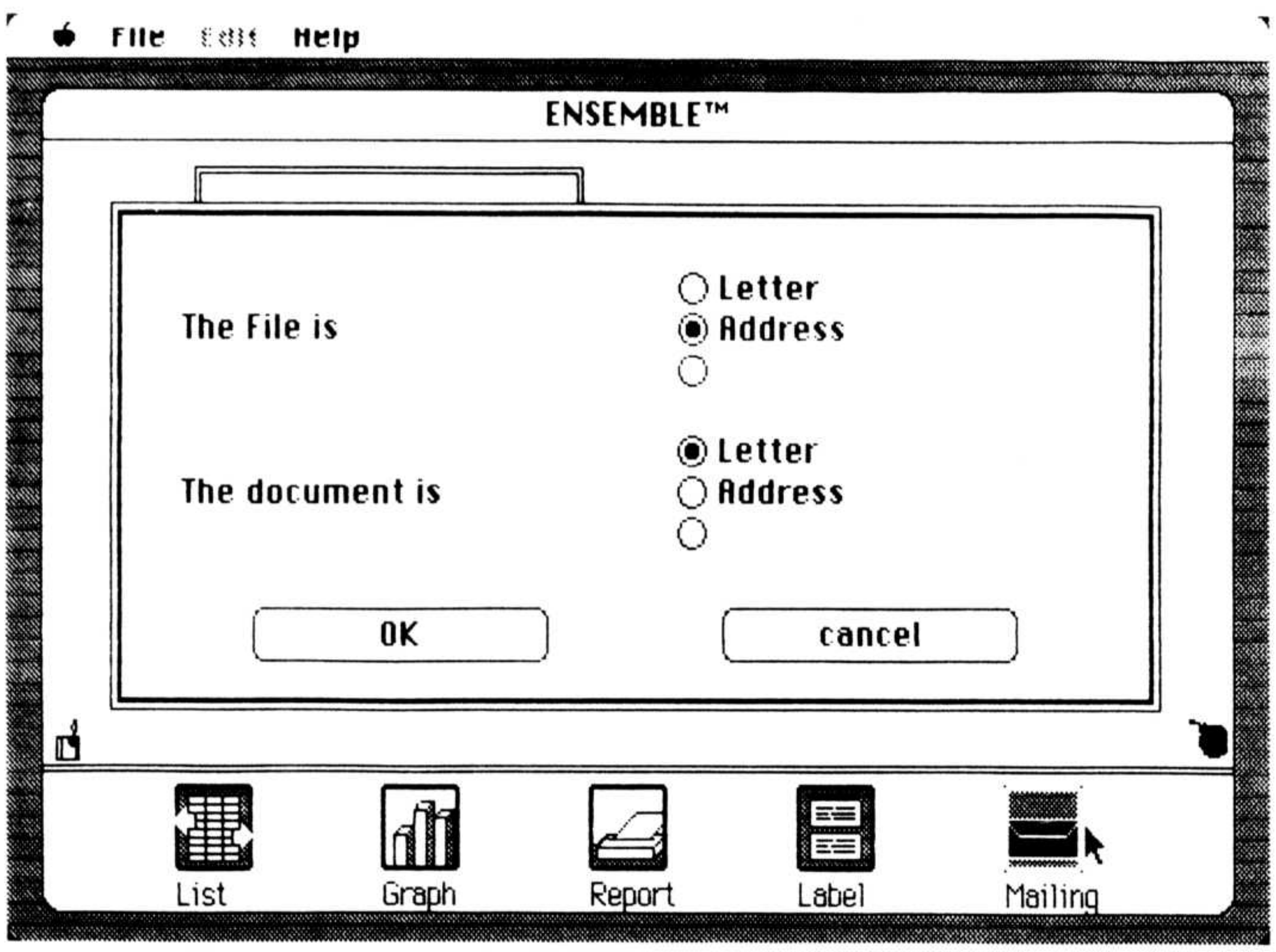
Some of these fields have been set up to receive MacPaint images (this is the case with the Hayden Software logo) while others are set up as word processing areas. In fact, the body of the letter was prepared using Ensemble's word processor — which features word wrap, cut, copy and paste, insert and delete, and style changes.

Note that the address and name static text areas include information contained in brackets ([ ]). The brackets contain the field names from the Address file that will be merged into the Letter during printing. You simply type field names inside brackets to establish the data flow between files.



Performing the Mail Merge

Return to the Ensemble Desktop and click the MAILING icon. A dialog box will appear. The File (input) is Address and the document (output) is Letter.



The Address file will feed data to the Letter file. And your form letter will be automatically generated.

HAYDEN
SOFTWARE

January 2, 1985

Mr. John McIntyre
Chief Financial Officer
Lipton Tea Company
32 Sylvan Avenue
Englewood, NJ 02356

Dear Mr. McIntyre:

It is with great pleasure that we introduce Ensemble™ to you, an integrated productivity package for the Macintosh. Unlike the competition, Ensemble will run in both 128K and 512K. It will, however, operate faster and handle much larger file sizes in 512K.

Please let us know how you think it compares to other integrated packages you have used.

Sincerely yours,

600 Suffolk Street Lowell, Massachusetts 01854

As with the REPORT feature in Ensemble, you can specify what records are sent to the MAIL MERGE by using the !SORT AND !SELECT commands in the Specifications Window of the Input File.

Templates for Calculations

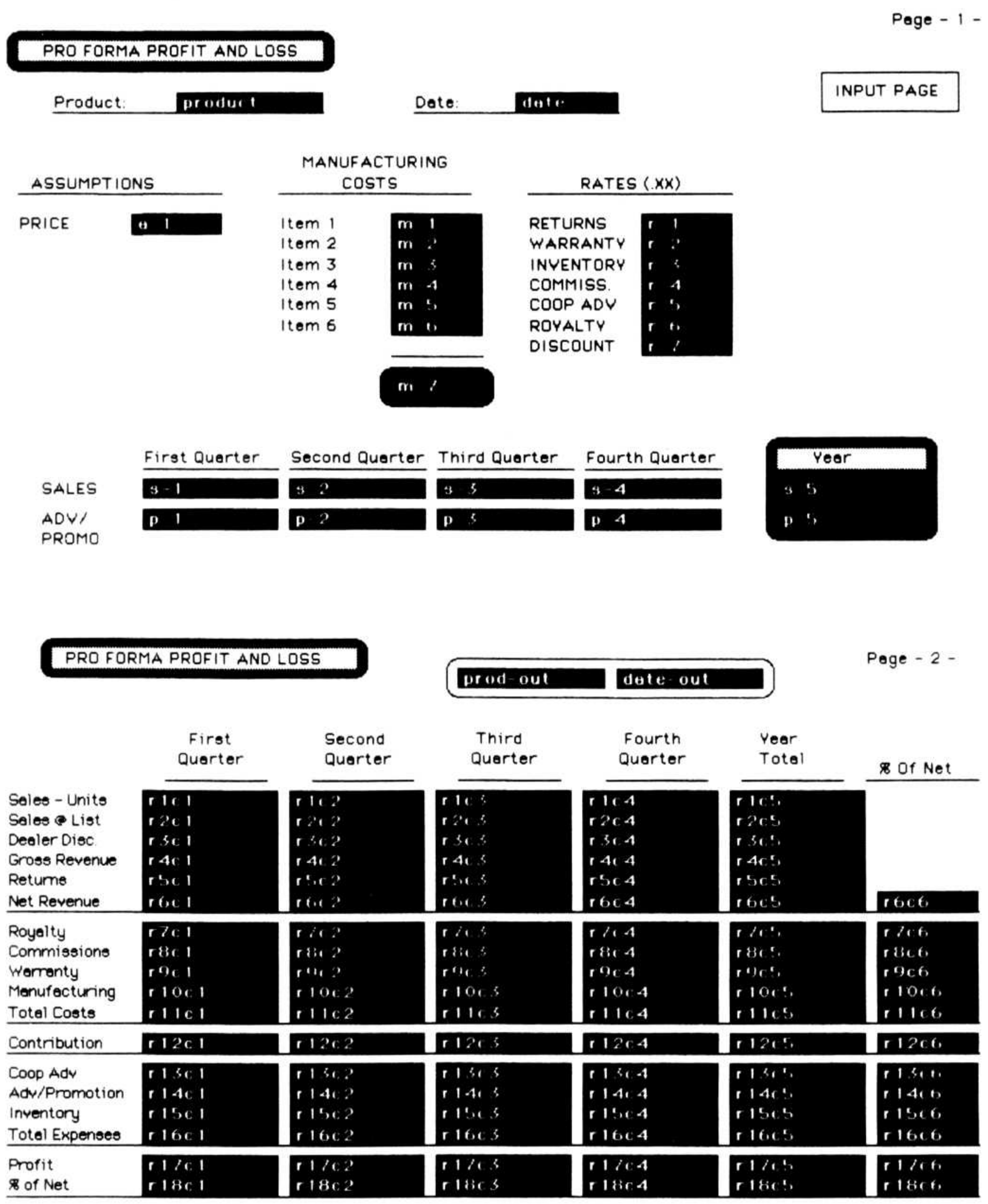
To facilitate numerical analyses and provide additional examples of Ensemble's capabilities, four templates have been provided on your Examples disk. They are:

Title	File Name
1. Pro Forma Profit and Loss	P and L
2. Sales Analysis	Sales Analysis
3. Personal Net Worth	Net Worth
4. Budget Spreadsheet	Budget Sheet

Pro Forma Profit and Loss

The P and L template is set up on two pages. Page 1 is the input page and page 2 provides the calculations by line item and by quarter.

> NOTE: For your reference in making or changing calculations, the field names are shown in reverse type.



	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	Year Total	% Of Net
Sales - Units	r1c1	r1c2	r1c3	r1c4	r1c5	
Sales @ List	r2c1	r2c2	r2c3	r2c4	r2c5	
Dealer Disc	r3c1	r3c2	r3c3	r3c4	r3c5	
Gross Revenue	r4c1	r4c2	r4c3	r4c4	r4c5	
Returns	r5c1	r5c2	r5c3	r5c4	r5c5	
Net Revenue	r6c1	r6c2	r6c3	r6c4	r6c5	r6c6
Royalty	r7c1	r7c2	r7c3	r7c4	r7c5	r7c6
Commissions	r8c1	r8c2	r8c3	r8c4	r8c5	r8c6
Warranty	r9c1	r9c2	r9c3	r9c4	r9c5	r9c6
Manufacturing	r10c1	r10c2	r10c3	r10c4	r10c5	r10c6
Total Costs	r11c1	r11c2	r11c3	r11c4	r11c5	r11c6
Contribution	r12c1	r12c2	r12c3	r12c4	r12c5	r12c6
Coop Adv	r13c1	r13c2	r13c3	r13c4	r13c5	r13c6
Adv/Promotion	r14c1	r14c2	r14c3	r14c4	r14c5	r14c6
Inventory	r15c1	r15c2	r15c3	r15c4	r15c5	r15c6
Total Expenses	r16c1	r16c2	r16c3	r16c4	r16c5	r16c6
Profit	r17c1	r17c2	r17c3	r17c4	r17c5	r17c6
% of Net	r18c1	r18c2	r18c3	r18c4	r18c5	r18c6

To use the P and L template as constructed you will open the P and L file and input into page 1:

- List Price
- Cost of Goods (by material item)
- Discount and Expense Rates (expressed as decimals)
- Quarterly Sales in Units
- Quarterly Advertising and Promotion Expenses

Then select DO COMPUTATION from the OPTIONS menu. On page 1, Total Cost of Goods, Total Sales, and Total Advertising/Promotion will be calculated.

On page 2 the following operations will happen automatically:

- *Sales Units* will be inserted.
- *Sales @ List* will equal *Price* times *Sales Units.*
- *Dealer Discount* will equal *Sales @ List* times *Discount rate.*
- *Gross Revenue* will equal *Sales @ List* minus *Dealer Discount.*
- *Returns* will equal *Gross Revenue* times *Returns rate.*
- *Net Revenue* will equal *Gross Revenue* minus *Returns.*
- *Royalty* will equal *Net Revenue* times *Royalty rate.*
- *Commissions* will equal *Net Revenue* times Commission *rate.*
- *Warranty* will equal *Net Revenue* times *Warranty rate.*
- *Cost of Goods* will equal *Total Cost of Goods* times *Sales Units.*
- *Total Costs* will equal the sum of *Royalty, Commissions, Warranty,* and *Cost of Goods.*
- *Contribution* will equal *Net Revenue* minus *Total Costs.*
- *Coop Advertising* will equal *Net Revenue* times *Coop Adv rate.*
- *Adv/Promotion* will be inserted.
- *Inventory* will equal *Net Revenue* times *Inventory rate.*
- *Total Expenses* will equal the sum of *Coop Advertising, Adv/ Promotion,* and *Inventory.*
- *Profit* will equal *Contribution* minus *Total Expenses.*
- *% of Net* will equal *Profit's* per-cent of *Net Revenue*

How to Customize

You may change any title names or even field names as you desire within the Design Window of the P and L file. The computations that are made can be altered via the Computation Window, which is accessed from the Design Window via the COMPUTE icon.

Sales Analysis

The Sales Analysis template is set up to allow you to examine sales performance by product within region. Planned, Actual, and % of Planned sales figures are provided on a current month and Year-To-Date basis.

SALES ANALYSIS | DATE:

PRODUCT	CURRENT MONTH PLANNED	CURRENT MONTH ACTUAL	CURRENT MONTH % ACH.	YEAR-TO-DATE PLANNED	YEAR-TO-DATE ACTUAL	YEAR-TO-DATE % ACH.
	CP-1	CA-1	C%-1	YP-1	YA-1	Y%-1
	CP-2	CA-2	C%-2	YP-2	YA-2	Y%-2
	CP-3	CA-3	C%-3	YP-3	YA-3	Y%-3
	CP-4	CA-4	C%-4	YP-4	YA-4	Y%-4
	CP-5	CA-5	C%-5	YP-5	YA-5	Y%-5
	CP-6	CA-6	C%-6	YP-6	YA-6	Y%-6
TOTAL - REGION I	CP-7	CA-7	C%-7	YP-7	YA-7	Y%-7
	CP-8	CA-8	C%-8	YP-8	YA-8	Y%-8
	CP-9	CA-9	C%-9	YP-9	YA-9	Y%-9
	CP-10	CA-10	C%-10	YP-10	YA-10	Y%-10
	CP-11	CA-11	C%-11	YP-11	YA-11	Y%-11
	CP-12	CA-12	C%-12	YP-12	YA-12	Y%-12
	CP-13	CA-13	C%-13	YP-13	YA-13	Y%-13
TOTAL - REGION II	CP-14	CA-14	C%-14	YP-14	YA-14	Y%-14
	CP-15	CA-15	C%-15	YP-15	YA-15	Y%=15
	CP-16	CA-16	C%-16	YP-16	YA-16	Y%-16
	CP-17	CA-17	C%-17	YP-17	YA-17	Y%-17
	CP-18	CA-18	C%-18	YP-18	YA-18	Y%-18
	CP-19	CA-19	C%-19	YP-19	YA-19	Y%-19
	CP-20	CA-20	C%-20	YP-20	YA-20	Y%-20
TOTAL - REGION III	CP-21	CA-21	C%-21	YP-21	YA-21	Y%-21
	CP-22	CA-22	C%-22	YP-22	YA-22	Y%-22
	CP-23	CA-23	C%-23	YP-23	YA-23	Y%-23
	CP-24	CA-24	C%-24	YP-24	YA-24	Y%-24
	CP-25	CA-25	C%-25	YP-25	YA-25	Y%-25
	CP-26	CA-26	C%-26	YP-26	YA-26	Y%-26
	CP-27	CA-27	C%-27	YP-27	YA-27	Y%-27
TOTAL - REGION IV	CP-28	CA-28	C%-28	YP-28	YA-28	Y%-28
	CP-29	CA-29	C%-29	YP-29	YA-29	Y%-29
	CP-30	CA-30	C%-30	YP-30	YA-30	Y%-30
	CP-31	CA-31	C%-31	YP-31	YA-31	Y%-31
	CP-32	CA-32	C%-32	YP-32	YA-32	Y%-32
	CP-33	CA-33	C%-33	YP-33	YA-33	Y%-33
	CP-34	CA-34	C%-34	YP-34	YA-34	Y%-34
TOTAL - REGION V	CP-35	CA-35	C%-35	YP-35	YA-35	Y%-35
COMPANY TOTAL	CP-36	CA-36	C%-36	YP-36	YA-36	Y%-36

To use this template simply move to the Design Window, input your product names within title fields along the left-hand margin, and redefine your sales region names. Then move to the Entry Window and input the Planned and Actual sales data. The per-cent achieved (% ACH), sub-totals, and totals, will be automatically generated when you select DO COMPUTATION from the OPTIONS menu.

Personal Net Worth

The Personal Net Worth template is designed to weigh your assets against your liabilities to generate your Personal Net Worth.

From the Entry Window, simply input data into the individual asset and liability accounts and the template will take care of the calculations when you select DO COMPUTATION.

PERSONAL NET WORTH

DATE:

	CURRENT	%	LAST YEAR	%	CHANGE
ASSETS					
Cash on Hand	COH-C	CH-P1	COH-L	CH-P2	$ CHG-1
Checking Account Balance(s)	CAB-C	CB-P1	CAB-L	CB-P2	$ CHG-2
Savings Account Balance(s)	SAB-C	AB-P1	SAB-L	AB-P2	$ CHG-3
Stocks and Bonds	SB-C	SB-P1	SB-L	SB-P2	$ CHG-4
Certificate(s) of Deposit	COD-C	CD-P1	COD-L	CD-P2	$ CHG-5
Cash-Value of Life Insurance	CLI-C	LI-P1	CLI-L	LI-P2	$ CHG-6
Cash-Value of Pension	CP-C	CP-P1	CP-L	CP-P2	$ CHG-7
Home (Market Value)	H-C	H-P1	H-L	H-P2	$ CHG-8
Rental Property (Mkt. Value)	RP-C	RP-P1	RP-L	RP-P2	$ CHG-9
Vacation Prop. (Mkt. Value)	VP-C	VP-P1	VP-L	VP-P2	$ CHG-10
Automobile(s)	AU-C	AU-P1	AU-L	AU-P2	$ CHG-11
Personal Property	PP-C	PP-P1	PP-L	PP-P2	$ CHG-12
Other	U-C	U-P1	U-L	U-P2	$ CHG-13
TOTAL ASSETS	$ TA-C	TA-P1	$ TA-L	TA-P2	$ CHG-14

	CURRENT	%	LAST YEAR	%	CHANGE
LIABILITIES					
Home Mortgage(s)	HM-C	HM-P1	HM-L	HM-P2	$ CHG-15
Other Real Est. Mortgage(s)	ORM-C	OM-P1	ORM-L	OM-P2	$ CHG-16
Automobile Loan Balance(s)	ALB-C	AL-P1	ALB-L	AL-P2	$ CHG-17
Personal Loan Balance(s)	PLB-C	PB-P1	PLB-L	PB-P2	$ CHG-18
Credit Card Balance(s)	CCB-C	CC-P1	CCB-L	CC-P2	$ CHG-19
Promissory Note Balance(s)	PNB-C	PN-P1	PNB-L	PN-P2	$ CHG-20
Other Debts	OD-C	OD-P1	OD-L	OD-P2	$ CHG-21
TOTAL LIABILITIES	$ TL-C	TL-P1	$ TL-L	TL-P2	$ CHG-22
NET WORTH	$ NET-C		$ NET-L		$ CHG-23
ASSETS	A-C		A-L		CHG-24
LIABILITIES	L-C		L-L		CHG-25
	THIS YEAR		LAST YEAR		

NETWORTH

Budget Spreadsheet

The quarterly budget spreadsheet template allows you to track actual expenditures versus budget across four fiscal or calendar quarters.

BUDGET SPREADSHEET

DATE:

	1ST QUARTER			2ND QUARTER			3RD QUARTER			4TH QUARTER			YEAR TOTAL		
	BUDGET	ACTUAL	%	BUDGET	ACTUAL	%	BUDGET	ACTUAL	%	BUDGET	ACTUAL	%	BUDGET	ACTUAL	%
	1B 1	1A 1	1 1	2B 1	2A 1	2 1	3B 1	3A 1	3 1	4B 1	4A 1	4 1	YB 1	YA 1	Y 1
	1B 2	1A 2	1 2	2B 2	2A 2	2 2	3B 2	3A 2	3 2	4B 2	4A 2	4 2	YB 2	YA 2	Y 2
	1B 3	1A 3	1 3	2B 3	2A 3	2 3	3B 3	3A 3	3 3	4B 3	4A 3	4 3	YB 3	YA 3	Y 3
	1B 4	1A 4	1 4	2B 4	2A 4	2 4	3B 4	3A 4	3 4	4B 4	4A 4	4 4	YB 4	YA 4	Y 4
	1B 5	1A 5	1 5	2B 5	2A 5	2 5	3B 5	3A 5	3 5	4B 5	4A 5	4 5	YB 5	YA 5	Y 5
	1B 6	1A 6	1 6	2B 6	2A 6	2 6	3B 6	3A 6	3 6	4B 6	4A 6	4 6	YB 6	YA 6	Y 6
	1B 7	1A 7	1 7	2B 7	2A 7	2 7	3B 7	3A 7	3 7	4B 7	4A 7	4 7	YB 7	YA 7	Y 7
	1B 8	1A 8	1 8	2B 8	2A 8	2 8	3B 8	3A 8	3 8	4B 8	4A 8	4 8	YB 8	YA 8	Y 8
	1B 9	1A 9	1 9	2B 9	2A 9	2 9	3B 9	3A 9	3 9	4B 9	4A 9	4 9	YB 9	YA 9	Y 9
	1B10	1A10	110	2B10	2A10	210	3B10	3A10	310	4B10	4A10	410	YB10	YA10	Y10
TOTAL	1B11	1A11	111	2B11	2A11	211	3B11	3A11	311	4B11	4A11	411	YB11	YA11	Y11

Budget and Actual expenditure figures are input. The total and per-cent of budget (%) are automatically calculated when you select DO COMPUTATION from the OPTIONS menu.

Insert your own expense item titles, via the Design Window, as required.

HAYDEN
SOFTWARE
600 Suffolk Street
Lowell, MA 01854
(800) 343-1218
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