CREATING YOUR OWN TEMPLATES

INTRODUCTION
The following shows you how to customize templates

The following components can be customized;

1. Investment, Revenue, Expenses & Salvage Folder grids by;
   - Adding, moving, inserting & deleting rows
   - Changing Descriptions
   - Changing the Entry Choices

2. Creating new Entry Choices

3. Adding Categories which allows you to group Revenues and Expenses

Example
A manufacture of pumps wants to evaluate an opportunity to produce a new line of pumps and wants to customize Investit Decision's "Invest Revenue & Expenses Yearly" by:

1. Creating new entry choices;
   $ per Sq. Ft per Yr entering the rent
   $ per Pump & Quantity

2. Break the Revenues and Expenses into two categories
   Manf. Cost
   Assembly

3. Customize the Revenue & Expenses Folders by adding new revenue and expense items

The Process:

1. Open the appropriate Investit template. We will use "Invest Revenue & Expenses Yearly" template
2. Create the new Entry Choices in the Revenue and Expense folders
3. Create the new Categories in the Revenue and Expense folders
4. Revise the Revenue & Expenses folders
5. Save as My Template

Once you have created and saved the template you can enter the data and save as a project

Open the Investit Decision Template "Invest Revenue & Expenses Yearly"
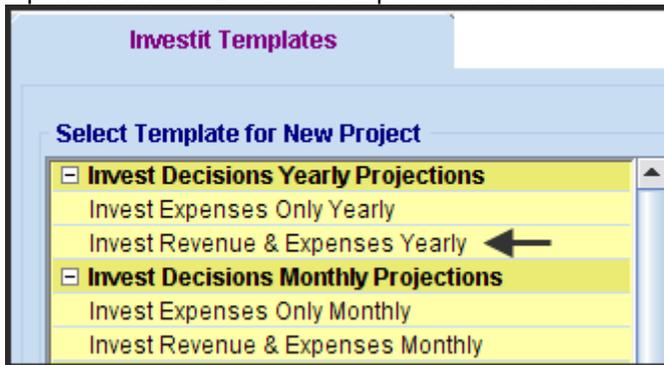
Leave the Analysis Period at 1 year

Enter or change the Analysis Time Period

For how many years do you wish to analyze the project?

Analysis Time Period [1] years ⬅

[QK]   [Cancel]   [Help]

INVESTOR Folder

Enter
1. Discount Rate or Desired Return before Tax: 15.00%
2. Short Term Financing Rate: 8.000%
3. Short Term investment Rate: 2.500%

Investor	Investment	Working Capital	Expenses	Revenue	Financing

☐ Turn off Tax Calculations

Tax Rate

Investor's Marginal Tax Rate	35.00%
Capital Gain Tax Rate	35.00%
Recaptured Depreciation Tax Rate	35.00%

Discount Rate or Desired Return on Investment

Before Tax	15.00% ⬅
After Tax	9.75%

Short Term Rates

Before Tax

Financing Rate	8.000% ⬅
Reinvestment Rate	2.500% ⬅

After Tax

Financing Rate	5.200%
Reinvestment Rate	1.625%

INVESTMENT Folder
Customize the Investment Folder as follows;

Investor	Investment	Working Capital	Expenses	Revenue	Financing

Investments

[Inflate]

Description	Amount	Year	Month	Depreciation Method	Recovery Period [yrs]
Land	$ 0	Year 1	Jan	Land (No Deprec.)	
Building	$ 0	Year 1	Jan	Commercial Prop. St Line	39.0
Equipment & Machinery	$ 0	Year 1	Jan	Personal Prop. 200% DB	7.0
Leashold Improvements	$ 0	Year 1	Jan	Leasehold Improv. St Line	39.0

Add new row & Description   **Delete these rows**   **Select**

The customized Investment Folder

Investments

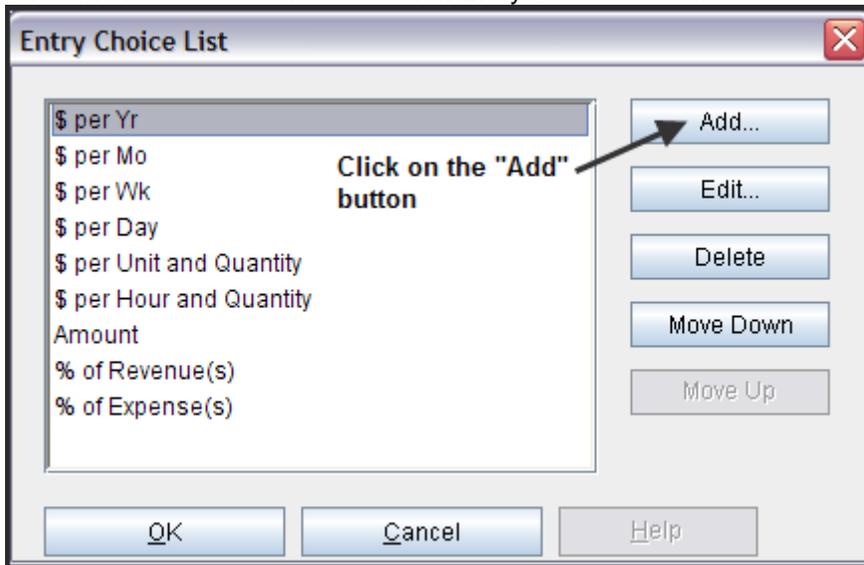|	Inflate					
Description	Amount	Year	Month	Depreciation Method	Recovery Period [yrs]
Equipment & Machinery	$ 0	Year 1 ▾	Jan ▾	Personal Prop. 200% DB ▾	7.0
Leashold Improvements	$ 0	Year 1 ▾	Jan ▾	Leasehold Improv. St Line ▾	39.0

EXPENSES folder

Entry Choices
Add the following two Entry Choices to the Entry Choice list.

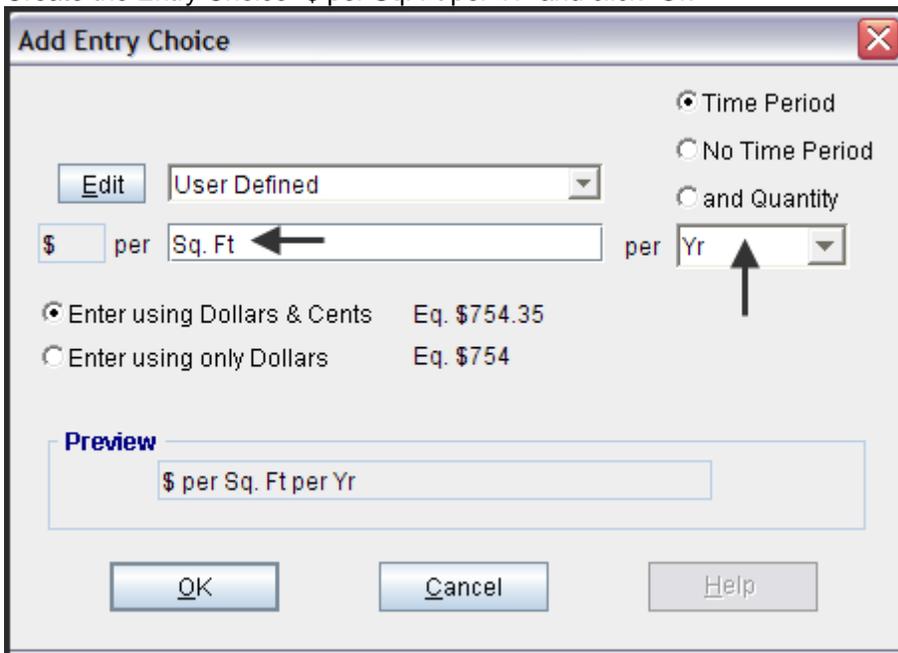1. $ per Sq. Ft per Yr
2. $ per Pump & Quantity as follows;

Go the Expense Folder and display the Entry Choice List and select "Edit List"

Project Info.	Investor	Investment	Working Capital	**Expenses**

Expenses

Description	Entry Choice	Qty	Category	Year 1 Jan...
Labor	$ per Yr ▾	—	Common ▾	$ 0
Materials	$ per Yr ▾	—	Common ▾	$ 0
Repairs & Maintenance	$ per Yr ▾	—	Common ▾	$ 0
Utilities	$ per Yr ▾	—	Common ▾	$ 0
Insurance	$ per Yr ▾	—	Common ▾	$ 0
Incremental Overhead	$ per Yr ▾	—	Common ▾	$ 0

$ per Yr
$ per Mo
$ per Wk
$ per Day
$ per Unit and Quantity
$ per Hour and Quantity
Amount
% of Revenue(s)
% of Expense(s)
Edit list... ⬅

Click on the "Add' button to add a new Entry Choice to the list

Entry Choice List

$ per Yr
$ per Mo
$ per Wk
$ per Day
$ per Unit and Quantity
$ per Hour and Quantity
Amount
% of Revenue(s)
% of Expense(s)

Click on the "Add" button

Add...
Edit...
Delete
Move Down
Move Up

OK   Cancel   Help

Create the Entry Choice "$ per Sq. Ft per Yr" and click "Ok"

Add Entry Choice

○ Time Period
○ No Time Period
○ and Quantity

Edit   User Defined

$ per Sq. Ft   per Yr

⊙ Enter using Dollars & Cents   Eq. $754.35
○ Enter using only Dollars   Eq. $754

Preview

$ per Sq. Ft per Yr

OK   Cancel   Help

To create the Entry Choice "$ per Pump & Quantity"

Entry Choice List

$ per Yr
$ per Mo
$ per Wk
$ per Day
$ per Unit and Quantity
$ per Hour and Quantity
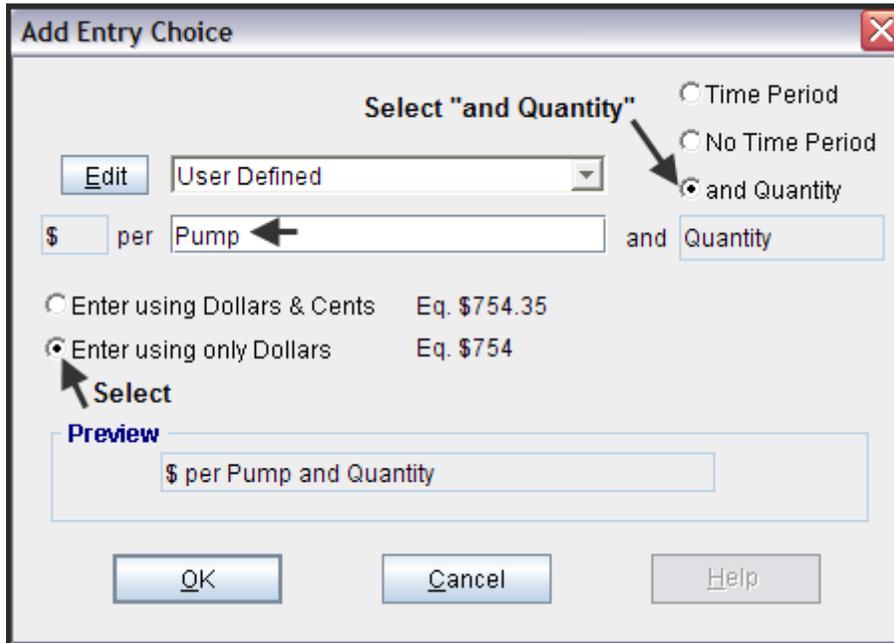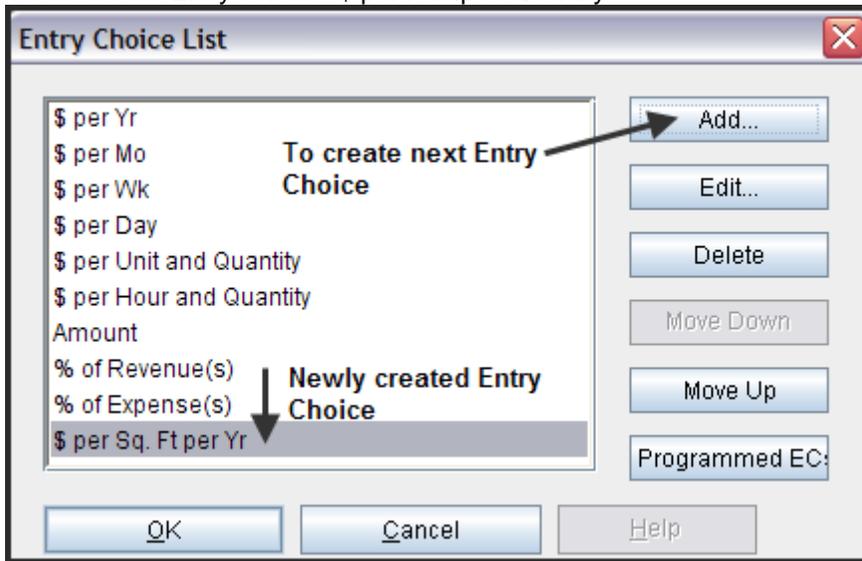Amount
% of Revenue(s)
% of Expense(s)
$ per Sq. Ft per Yr

To create next Entry Choice

Newly created Entry Choice

Add...
Edit...
Delete
Move Down
Move Up
Programmed EC:

OK   Cancel   Help

Add Entry Choice

Select "and Quantity"

○ Time Period
○ No Time Period
● and Quantity

Edit   User Defined

$ per   Pump   and   Quantity

○ Enter using Dollars & Cents   Eq. $754.35
● Enter using only Dollars   Eq. $754

Select

Preview

$ per Pump and Quantity

OK   Cancel   Help

The two new Entry Choices have now been added to the Entry Choice List

$ per Yr
$ per Mo
$ per Wk
$ per Day
$ per Unit and Quantity
$ per Hour and Quantity
Amount
% of Revenue(s)
% of Expense(s)
$ per Sq. Ft per Yr
$ per Pump and Quantity
Edit list...
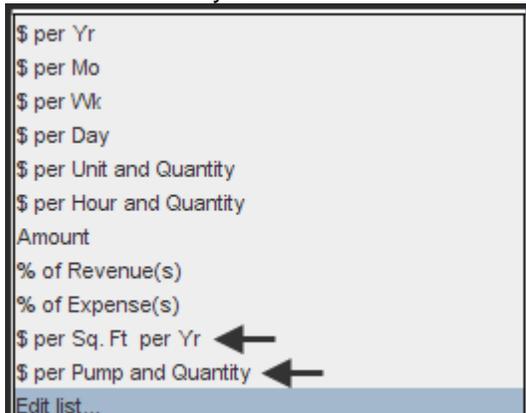
Adding Categories
Categories can be used to group revenues and expenses
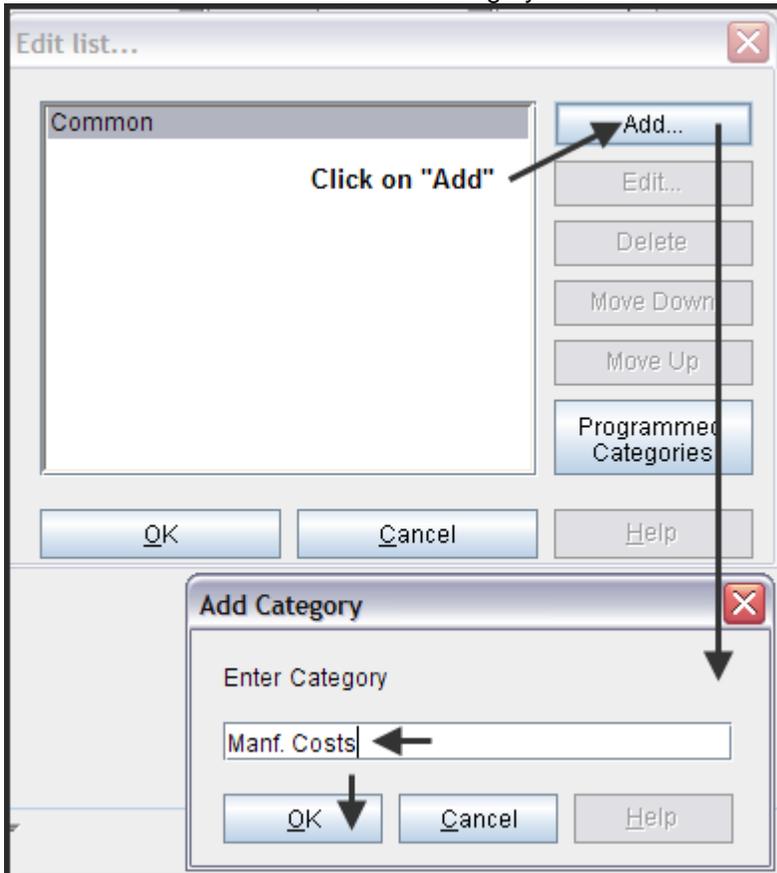
We will add the following three Expense Categories

1. Manf. Costs
2. Assembly
3. Overhead

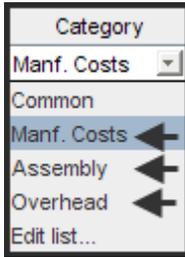Go the Expense Folder and display the Category List and select "Edit List

Project Info.	Investor	Investment	Working Capital	Expenses	

Expenses

Description	Entry Choice		Qty	Category		Year 1 Jan...
Labor	$ per Yr	▼	—	Common	▼	$ 0
Materials	$ per Yr	▼	—	Common	▼	$ 0
Repairs & Maintenance	$ per Yr	▼	—	Common	▼	$ 0
Utilities	$ per Yr	▼	—	Common	▼	$ 0
Insurance	$ per Yr	▼	—	Common	▼	$ 0
Incremental Overhead	$ per Yr	▼	—	Common	▼	$ 0
				Common		
				Edit list... ◄──		

Click on the "Add" button to add the Category "Manf. Costs"

Edit list...   ✕

Common   ▼ Add...

Click on "Add" ───►   Edit...

                                      Delete

                                      Move Down

                                      Move Up

                                      Programmed
                                      Categories

   OK   Cancel   Help

Add Category   ✕

   Enter Category

   Manf. Costs ◄──

      OK ▼   Cancel   Help

Repeat the process to add the "Assembly" and "Overhead" categories

The three new Categories have now been added to the Category List

Category
Manf. Costs
Common
Manf. Costs ←
Assembly ←
Overhead ←
Edit list…

Customizing the Revenue & Expenses Folders

The Expenses Folder had been customized as follows by adding or inserting rows and description and by selecting the appropriate Entry Choice and Category

Expenses Folder before customization

Project Info.	Investor	Investment	Working Capital	Expenses

Expenses

Description	Entry Choice	Qty	Category	Year 1 Jan…
Labor	$ per Yr	—	Common	$ 0
Materials	$ per Yr	—	Common	$ 0
Repairs & Maintenance	$ per Yr	—	Common	$ 0
Utilities	$ per Yr	—	Common	$ 0
Insurance	$ per Yr	—	Common	$ 0
Incremental Overhead	$ per Yr	—	Common	$ 0

Expenses Folder after customization

Project Info.	Investor	Investment	Working Capital	Expenses

Expenses

Description	Entry Choice	Qty	Category	Year 1 Jan…
Labor. Manf	$ per Yr	—	Manf. Costs	$ 0
Labor Assembly	$ per Yr	—	Assembly	$ 0
Materials	$ per Pump and Quantity	—	Manf. Costs	$ 0
	Quantity	—		0
Maintenance Manf.	$ per Yr	—	Manf. Costs	$ 0
Maintenance Assemby	$ per Yr	—	Assembly	$ 0
Utilities	$ per Yr	—	Overhead	$ 0
Insurance	$ per Yr	—	Overhead	$ 0
Incremental Overhead	% of Expense(s)	—	Overhead	0.00%
Rent	$ per Sq. Ft per Yr	0	Overhead	$ 0.00
Sales Commissions	% of Revenue(s)	—	Overhead	0.00%

Revenue Folder

First the Entry Choice "$ per Pump & Quantity" was added to the Entry Choice list

Revenue Folder before customization

Revenue Folder after customization

Saving the customized template

Go to the "file Menu" and select "Save as Template"

| File | Edit | Reports | Tools | Utilites | Inv |

New Project...	Ctrl+N
Open Project...	Ctrl+O
Close Project	
Save Project	Ctrl+S
Save Project As...	
Rename Project...	
Delete Projects...	
Save As Template...	◄── Ctrl+Shift+S
Rename Template...	
Delete Templates...	
Import/Export	
Company Logo	
Project Images	
Printer setup...	
Print Reports...	Ctrl+P
Exit	Ctrl+Q
New Template...	
Click Here to test Error	Ctrl+Shift+K
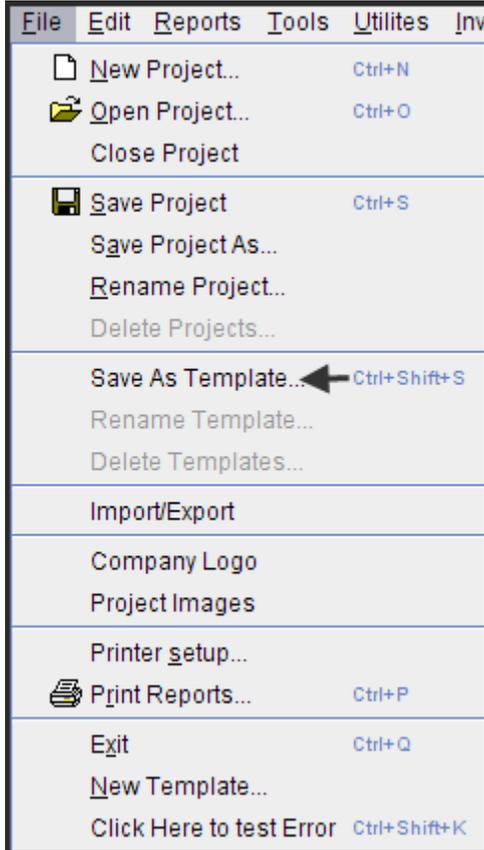
Give the template a name. You an also enter a description of the template

Save Template As

Enter a name for the template

Customized Template ◄──

Enter Template Description

This Template was created using
'Invest Revenue & Expenses Yearly' template.

Use this section to describe the template ◄──

OK   Cancel   Help
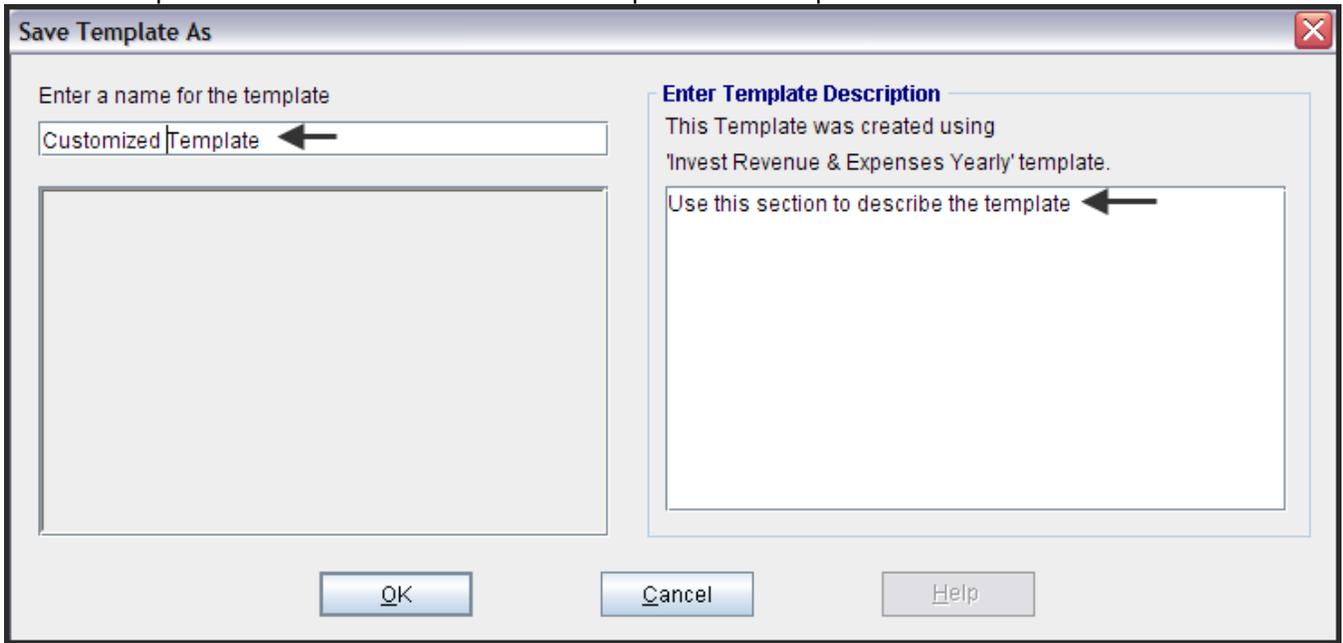
The customized template is now available in the "My Templates" folder