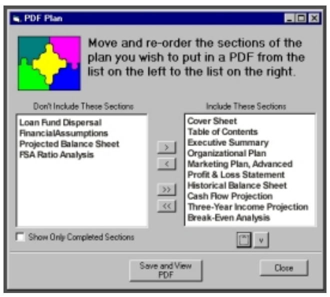
WHAT'S NEW?

AUTOMATE YOUR BUSINESS PLAN

VERSION 2011

1. Version 2011 Can Now Save Your Plan to a PDF File



In this version of Automate Your Business Plan, we have provided the user with the capability to save a business plan (text and spreadsheets) to a PDF file for Adobe Acrobat® or Adobe Acrobat Reader®

With our Save Plan to PDF feature, you have the option to choose any or all parts of your business plan that you wish to include in the PDF file. This will enable you to tailor information that you wish to share with business associates or potential lenders or investors.

The Save Plan to PDF feature can be accessed via the main toolbar PDF icon or by choosing "Save Plan to PDF" from the main menu File dropdown.

2. Develop a PowerPoint Presentation

The main icon tool bar now has an icon that will guide you through the process of developing a business plan PowerPoint presentation to use when you are seeking investors for your company (or for other purposes). The feature detects whether or not you have Microsoft PowerPoint® installed on your computer. If you do, an icon will be visible in the main tool bar. By clicking on the icon, you will be offered instruction, example, and template menus. You can view two finished examples of presentations. Then you can open one of our two presentation template sets and use it to develop your own presentation.

3. Windows® 7 Compatibility

Automate Your Business Plan 2011 is compatible with the new Windows® 7 operating system. You can rest assured that you will not have any conflicts if you are using a new computer with Windows® 7 or if you have upgraded your computer to the new operating system.

New In Our Previous Version

1. Menu Tree for Easy Access to Plan Files

In previous versions of Automate Your Business Plan, the only access to plan files (instructions, examples, and working plan templates) was via dropdown menus, which could prove to be cumbersome. To get to lower level menus, the user was required to mouse down through the menu maze to get to the menu for each individual task.

The dropdown menus are still available, but there is now a menu tree that is always visible on the left-hand side of the screen. This means that you can always see the entire list of business planning tasks. A click on the selected menu tree item will open the file. If you choose to, you can have multiple files open at the same time and can go to the Window on the menu bar to tile them vertically or horizontally.

The menu tree will appear mostly expanded. However, you can expand or contract higher levels of the tree by clicking a plus (+) or minus (-).

2. Main Menu Icon Bar with Descriptions for Faster Access

Our Icon Bar gives you one click access to opening new or existing plans, printing, saving text to PDF, using our word processor or spreadsheet applications as stand alone tools, accessing your plan checklist, going to our Internet research site, and using out amortizing tool. The icons now also have visible descriptions so you will know what they are without hovering over them with your mouse cursor in order to see balloon descriptions.

3. Guide for Business Planning for Nonprofit Organizations

Prior to the 2009 version, there was nothing in the software (or the *Anatomy of a Business Plan* book) that was designed to give specific help to writers of business plans for nonprofit organizations.

We have included a chapter in the book and the same information in the software that provides a basic understanding about nonprofits and then guides the business plan writer through the development of a plan specific to nonprofits by highlighting the differences that need to be addressed in each of the major areas of a business plan.

Note. To access the nonprofit guide in the software, go to the **Before You Begin menu à Business Planning for Your Nonprofit** under **Create/Edit Plan** on the Menu Tree or on the Main Menu bar.

4. New and Improved Features in our Word Processor

We upgraded the word processor to the latest Text Control version 14 in our 2008 version. It has some nice new features that will help you to write your plan more efficiently.

- **Page Numbering Has More Format Options**
  The page numbering feature allows the user to insert and format page numbers in the headers or footers of the document pages.

- **Images Can Now be Sized, Moved, and Formatted**
  In prior versions, the user could insert a fixed-size image into at the point of the cursor in text documents. The user will now be able to resize and move the image, as well as format it for layout and positioning.

- **Insert Section Break and Insert Page Break Added**
  The user will be able to insert section breaks into their text documents and page breaks into the document, as well as have different headers or footers in each section.

Other Notable Software Features

1. Chart of Accounts Wizard: Our New "Save & Exit" Feature

We added a new feature to our Chart of Accounts Wizard that allows users to input information in increments. If you do not have time to finish with the Wizard and generate your spreadsheet workbook, you can select "Save & Exit". When you return to the Wizard, your previous input will be there and you can continue without starting over again.

2. Our New Loan Calculator (Amortizing) Tool

We have always had an amortizing program, but it was an old DOS application. We have now added an up-to-date loan calculator that will enable you to input anticipated loan information and even extra payments that you wish to make. It will then calculate the required monthly payments, and provide you with a printable amortizing schedule for the entire term of the loan, complete with a detailed list of monthly and annual principal and interest payments.

3. "Window" Menu on the Main Screen Menu Bar

We added a Window Menu on the Main Screen Toolbar. When more than one file is open, the menus will give you the following choices: Tile Horizontally, Tile Vertically, Cascade, Arrange Icons, or Choose the file to bring to the screen front.

A notable example of the benefit to the user can be found in the spreadsheet workbook. When you are working in a spreadsheet, you can choose ***"Help for the Current Worksheet"*** from the spreadsheet Help menus. The screen is automatically split with the scrollable spreadsheet occupying the top half of the window and scrollable instructions occupying the bottom half – neatly guiding you through financial input throughout the spreadsheet.

4. Worksheets with Timeline (Milestone) Tables for Managing Projects

We added a Timeline-Milestones Worksheet for managing milestones in various types of projects. There are four tables that you can choose from to plan and track milestones for different purposes – marketing campaigns, web site development, launch of new products or services, and opening of a retail or service operation. The various tables can also be altered to work for other projects, such as completion of contracts, planning expansion, launching of industry publications, etc. As always, there is a menu that leads to examples that will give the writer ideas as to how these tables might have been filled-in and utilized by other companies.

5. Add/Delete/Edit Chart of Accounts

Our Chart of Accounts Wizard enables you to input revenue, expense, and balance sheet categories, as well as other information. The software generates an integrated *(linked)* spreadsheet workbook that is completely customized to your business. Starting in Version 12.0, we added the capability for you to return to our Wizard to make changes.

Revise Your Accounts Without Starting Over Again!
If you discover, after your spreadsheet workbook has been generated and you have spent hours inputting numbers, that you want to make changes to the workbook accounts (delete categories, add new categories, or edit the names of categories), we now have a financial spreadsheet menu (Edit/Add/Delete Chart of Accounts) that will take you back to our Chart of Accounts Wizard to make your changes. The neat thing is that none of your previous work will be lost or disrupted. After you have made your changes, a revised spreadsheet workbook will be generated for you and you can continue with your input.

6. Cash and Invoice Sales Calculations

Depending on your business, you may have to deal with invoiced sales. This means that for each type of product sold or each type of service rendered, a portion (percentage) of the cash is received at the time of the sales and the remainder at times determined by established invoice terms (30, 60, or 90 days). Accounting for the terms related to each product/service category can be a daunting task. We have automated that process by enabling you to enter the portion (percentage) of cash sale, percentage of invoiced sales, and the invoice terms for each product or service in our Chart of Accounts Wizard. The software then utilizes the information to calculate and apportion the inflow of cash into the appropriate months. This will ensure a realistic cash flow projection for your company.

7. Importing and Exporting of Your Plan Project

We realize that our users may wish to work on their business plans on more than one computer. In our new version, we have added Import and Export menus to the main File menu in Automate Your Business Plan 12.0. You "Export" your plan project and save it to a CD or other transportable media device.

When you are working in Automate Your Business Plan on one of your other computers, you can then "Import" the plan project to that computer and continue your work. When you want to transport it back to the original computer, you can reverse the process.

8. Revert to an Archived Version of a Plan File

On occasion, a user will make changes to plan files and then decide that a previously-saved version of that file is more desirable. In Automate Your Business Plan 12.0, we have added a "Revert" menu to the File menus of the word processor and spreadsheet tools. If you wish to revert to an earlier version of your plan file, selecting this menu will allow you to choose from previously-saved files and replace your current plan file.

9. Integrated (Linked) Spreadsheet Workbook

Users can create a linked set of financial spreadsheets that is completely customized to their own charts of accounts. In the past, the spreadsheets have been separate files that had to be customized by the user. Now our Chart of Accounts Wizard will take you through the setup process and your workbook of linked spreadsheets will instantly be completely customized to your business. Numbers input in one spreadsheet will automatically be input in all related spreadsheets. When you update information, it will be updated throughout the workbook.