No. 671,097. Patented Apr. 2, 1901.

A. TEMPLETON.

INDEX AND TRIAL BALANCE.

(Application filed Oct. 23, 1900.)

(No Model.) 2 Sheets—Sheet 1.

Fig. 1.

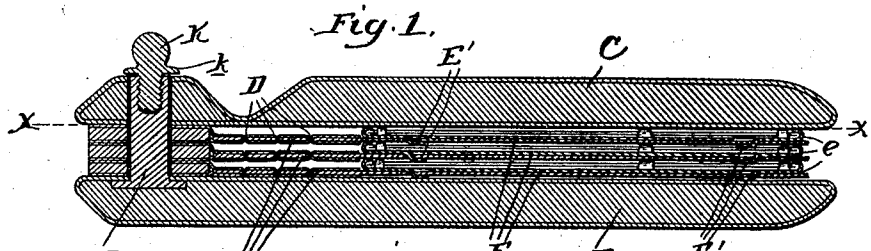


Fig. 3.

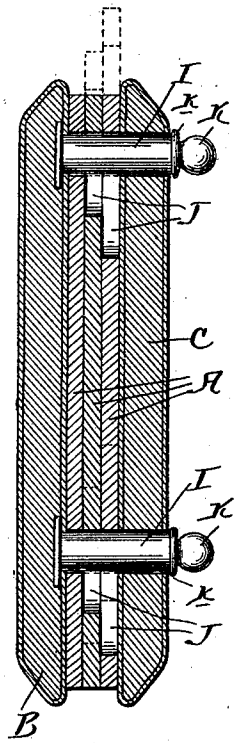


Fig. 2.

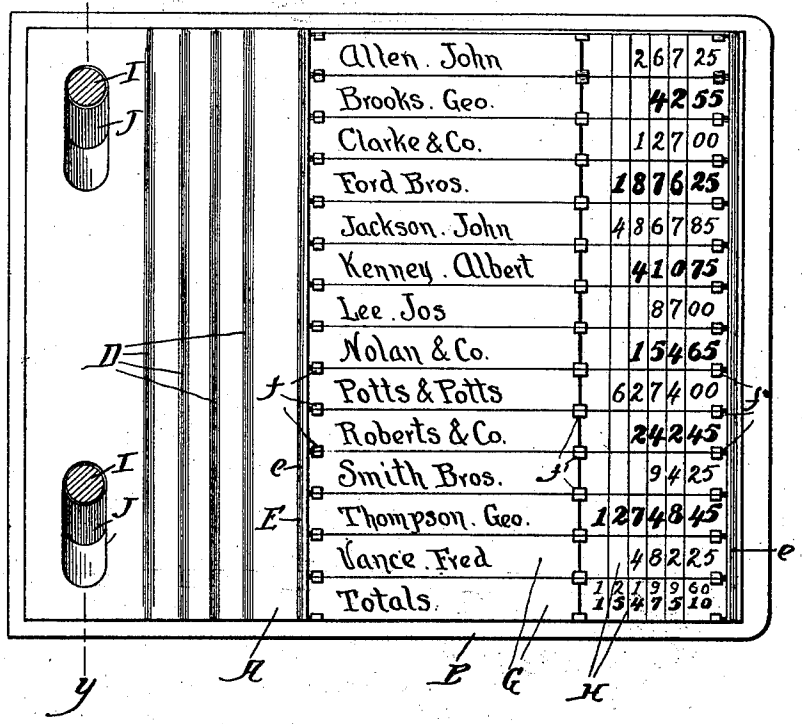
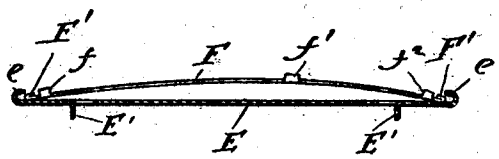


Fig. 4.



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No. 671,097. Patented Apr. 2, 1901.

A. TEMPLETON.

INDEX AND TRIAL BALANCE.

(Application filed Oct. 23, 1900.)

(No Model.) 2 Sheets—Sheet 2.

Fig. 5.

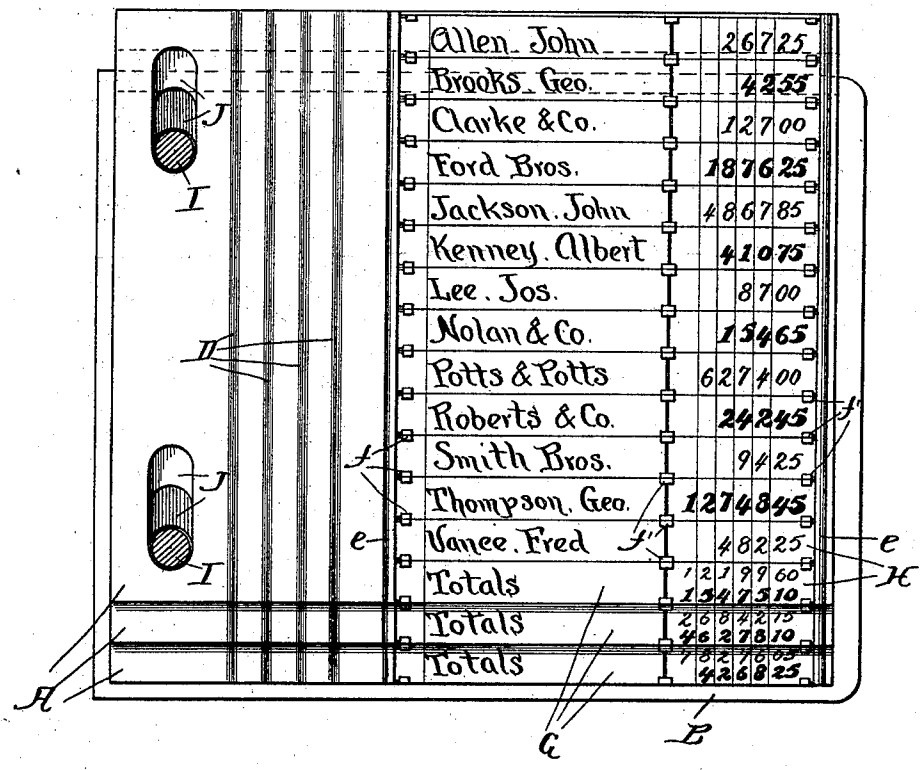


Fig. 6.

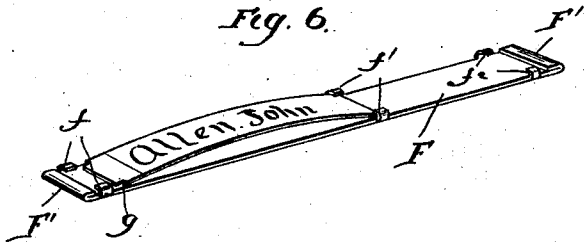


Fig. 7.

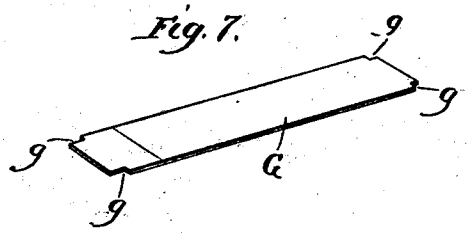
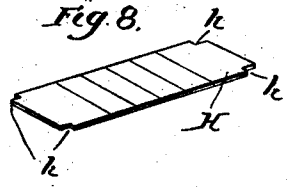


Fig. 8.



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UNITED STATES PATENT OFFICE.

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INDEX AND TRIAL-BALANCE.

SPECIFICATION forming part of Letters Patent No. 671,097, dated April 2, 1901.

Application filed October 23, 1900. Serial No. 34,021. (No model.)

To all whom it may concern:

Be it known that I, ALLISON TEMPLETON, a citizen of the United States, residing at Corsicana, county of Navarro, and State of Texas, have invented a certain new and useful Improvement in Indexes and Trial-Balances, of which the following is a specification.

My invention relates to a new and useful improvement in indexes and trial-balances, and is designed more especially for card-index and loose-leaf ledgers.

One object of my invention is to provide a trial-balance and index which will be composed of a number of loose leaves adapted to be bound between suitable covers, each one of the leaves having vertical guideways formed thereon which are adapted to guide and hold spring-strips which can be sprung in the guideways or removed therefrom very easily and when in the guideways can be slid up and down vertically. Each one of these spring-strips has retaining devices formed thereon which are adapted to hold in each strip two slips of paper, the longer slip to contain the name of the individual or firm having accounts and on the shorter slip are put their daily balances, the credit in black ink and the debit balances in red ink. These short slips having the balances on are to be removed and new ones inserted wherever the account changes. The totals are to be placed on the lower slip of each page. When an account is closed, the holder or spring-strip is removed entirely, and when a new account is added the holder is put in its proper alphabetical order.

A further object of my invention is to provide in the binding of the leaves means whereby the leaves can be pushed upward, the bottom leaf being stationary, and each one from there up to the top leaf can be pushed the distance equal to the width of one of the spring-strips farther than the one just below it, so that it will make the totals at the bottom of each page all in sight at the same time, so that they can be readily added up.

With these ends in view this invention consists in the details of construction and combination of elements hereinafter set forth and then specifically designated by the claims.

In order that those skilled in the art to which this invention appertains may understand how to make and use the same, the construction and operation will now be described in detail, referring to the accompanying drawings, forming a part of this specification, in which—

Figure 1 represents a cross-section of my invention, showing three leaves. Fig. 2 is a sectional plan taken on the line $x\ x$ of Fig. 1. Fig. 3 is a section taken on the line $y\ y$ of Fig. 2; Fig. 4, a cross-section of the guideway adapted to hold the spring-metal strips, showing one of the strips sprung into position; Fig. 5, a sectional plan similar to Fig. 2, showing the leaves pushed up so as to bring the totals all in sight. Fig. 6 is a perspective of the spring-metal holder or strip, showing one of the paper slips about to be placed in position. Fig. 7 is a perspective view of the paper slip adapted to contain the names, and Fig. 8 a perspective view of the paper slip adapted to contain the figures.

A represents the loose leaves, which are adapted to be bound between the covers B and C by means hereinafter described. These leaves have the usual weakened portions D therein to facilitate the bending of the leaves while being turned.

E is a metal plate having upon each side the overturned lips *e*, which will thereby form a guideway for the spring-strips F. This metal plate E is secured to the leaf A by any suitable means, here shown as having retaining-pieces E′ punched out of the metal piece and bent down so as to pass through the leaf A and then bent over so as to retain the metal plate E in close contact with the leaf A. The spring-strips F are made of spring material—such as metal, celluloid, silicate, or the like—and in punching these strips out extensions are left upon each side of the spring-strips. These extensions are then bent upward and slightly over, so as to form retaining-lips *f*, *f′*, and f^2.

G represents paper slips, which are notched at *g* upon each corner. These notches are for the purpose of allowing one end of the slip G to be slipped beneath the retaining-lips *f* and the other end to be slipped beneath a portion of the retaining-lips *f′*.

H represents a paper slip having notches *h* formed in its corners, one end of which is adapted to be slipped beneath a portion of the

retaining-lips f', the other end adapted to be slipped beneath the retaining-lips f^2. By reason of the notches in these paper slips this will allow the edges of the slips, both G and H, to come in contact with its neighbor. If desired, the ends of the spring strip or holder F can be bent over, as illustrated at F', and this bent-over portion is adapted to fit beneath the lips e upon the metal plate E. The names of the individuals or firms holding accounts are adapted to be placed upon the paper slip G and their balances adapted to be placed upon the paper slips H. These names are supposed to be arranged alphabetically from the top of the page down. These spring-strips F can slide vertically within the guideways formed by the lips e, and the purpose of the sliding of these strips is that, for instance, in Fig. 2 we will suppose that Roberts & Company's account was closed and there was an account opened with a firm whose name commenced with "G," the spring-holder having "Roberts & Company" thereon would be removed, and all the holders from below the slip having "Ford Brothers thereon would be slipped downward and new slips containing the name of the new firm would be placed on the holder that was removed, and this holder would be placed in the vacant space left by sliding down the aforesaid holders, and thus the "G" would be in its proper place between the "F" and "J." Upon the bottom slip or holder of each page is placed the totals for that page. If there were a number of leaves in the book and the leaves were bound in the usual manner as they are now, the total from each page would have to be set down separately and then all added together. To overcome this disadvantage, I secure in the lower cover B posts I. These posts pass upward through slots J, formed in the leaves A, and pass through the holes formed in the upper cover C. Into the upper end of this post are screwed the buttons K, which have flanges k, which are larger than the posts and overlap the cover, so as to prevent the removal of the same. If desired, means can be employed for locking this cover C upon the post by the usual key and lock. (Not here shown.) The slots J, formed throughthe binding end of the leaves A, are of different lengths—that is, the lower leaf has simply a round hole about the size of the post, and this leaf remains stationary. The next leaf above will have a slot to allow that leaf to slide the distance of one of the spring strips or holders F upward. The next leaf above will have a slot long enough to allow that leaf to slide a distance equal to the width of two of the spring-strips F upward, and so on. Thus it will be seen that when it is desired to add up the totals upon each page the leaves are all pushed up as far as they will go, and this will leave the bottom strip of each page visible, when the different totals can be added very conveniently.

To remove either of the paper slips from any of the holders, it is simply necessary to insert a knife-blade beneath the slip and so raise it. To remove the spring-holders, you can insert a knife-blade or the finger-nail beneath one of the retaining-lips f' and so raise this.

The spring-strips F, if desired, can be made of celluloid, silicate, or the like, and need not have the retaining-lips f' and f^2 thereon; but the names and accounts can be written in pencil upon the spring-strip F itself, and when desired to change the account or to alter the balance can be easily erased and other writing substituted, or, if desired, the spring-strips F can have the retaining-lips f' and f^2 the same as shown, and, instead of paper, celluloid or like material can be used for the slips G and H and the names written thereon in pencil and erased, as desired, or the long slip G, containing the names, can be made of paper and the account-slip H can be made of celluloid or the like and the accounts written in pencil, so as to be erased when desired. When celluloid, silicate, or the like is used for the slips, the writing would have to be done in pencil, and then we could not designate the credit and debit by the use of red ink. In this case we would make the portion containing the figures longer, so as to rule it for two columns, one being used for the debit and the other for the credit balance.

In the drawings I have only represented three leaves and only a few names upon each leaf, so as to prevent too much repetition; but it is obvious that any number of leaves could be used, and the leaves may be long enough to accommodate any number of slips, although the most practical form for a book would be, probably, ten leaves containing fifty strips, thus allowing for five hundred accounts to a book.

My index and trial-balance is adapted as well to the old systems of bookkeeping as to the loose-leaf and card systems; but for the latter systems it furnishes the only practical means of obtaining an index and trial-balance in one.

It is obvious that this invention may be used for other purposes than the one herein mentioned, such as room-records for hotels, pay-rolls, &c.

The principal advantage of my invention is in a construction and method by which all the accounts can be at all times kept in perfect alphabetical order easily, regardless of how often the accounts change, old accounts closed, or new ones are opened, and at the same time always show the exact balance of every account daily and a daily trial-balance of the entire ledger.

A further advantage of my invention is the convenience and saving of time which is made possible by reason of my device for bringing the totals of each page all in view at once. This also reduces the chances of mistakes, as

it is well known in bookkeeping that every time you have to rewrite a number you increase the chances of a mistake.

Another advantage of my invention is that in constructing the spring-strips as I do, either when they contain paper slips or the accounts are written directly upon the spring-strips themselves, they will present an unbroken line of figures to view, as the strips will come close together without anything intervening between said strips to confuse the sight. It would, in fact, be nearly the same as if the figures were set down upon an undivided sheet of paper and can be added up just as readily.

The main feature of my invention is the fact that the names and accounts are adjusted as to location on the page and are easily moved in order to at all times maintain alphabetical arrangement.

Of course I do not wish to be limited to the exact construction here shown, as slight modifications could be made without departing from the spirit of my invention.

Having thus fully described my invention, what I claim as new and useful is—

1. In an index and trial-balance, loose leaves adapted to be held in a suitable binder, guideways formed upon the surfaces of said leaves, removable spring-strips adapted to be held and guided in said guideways, two slips, upon one of which the names are adapted to be written, and upon the other the accounts, said slips adapted to be removably secured and carried by said spring-strips, and means which will allow the leaves to be pushed upward and stop the leaves at the proper point so as to bring the bottom strips of each page all in view at once, substantially as and for the purpose specified.

2. In an index and trial-balance, loose leaves adapted to be held in a suitable binder, guideways formed upon the surface of said leaves, removable spring-strips adapted to be held and guided in said guideways, means which will allow the leaves to be pushed upward and stop the said leaves at the proper point so as to bring the bottom strips of each page all in view at once, substantially as and for the purpose specified.

3. In an index and trial-balance, loose leaves guideways running lengthwise of said leaves and secured thereto, spring-strips adapted to be guided in said guideways and to be sprung into and removed from said guideways, retaining-lips formed on each of the spring-strips, slips adapted to be inserted beneath these retaining-lips and held thereby, two covers adapted to protect these leaves, posts secured in one cover and adapted to pass through the leaves and be secured in the opposite cover, slots formed in the leaves through which the posts are adapted to pass, the slots through each leaf from the bottom upward to be longer than the one below it so as to allow the leaves to be pushed upward to bring the bottom strip of each leaf all in view at once, substantially as and for the purpose specified.

4. In an index and trial-balance, a loose leaf adapted to be held in a suitable binding, guideways running lengthwise of the leaf and secured thereto, removable spring-strips adapted to be held and to be slid in said guideways, overturned retaining-lips formed in pairs upon each end of the spring-strip, overturned retaining-lips formed upon each strip in pairs at a point intermediate between the two ends, slips adapted to contain the name of firms or individuals, notches formed in each corner of said slips, said slips adapted to be inserted beneath the retaining-lips upon one end of the spring-strip, and beneath the retaining-lips formed upon the spring-strip between the two ends, paper slips adapted to contain the accounts having notches formed in each corner thereof, one end of which is adapted to be inserted beneath the retaining-lips upon the other end of the metal strips, and the other end of this paper slip adapted to be inserted beneath the retaining-lips between the two ends of the spring-strip, the edges of these paper slips adapted to come flush with the edges of the spring-strips so that each paper slip will come in contact with its neighbor, substantially as and for the purpose specified.

5. In an index and trial-balance, a series of loose leaves adapted to contain the names and accounts, two covers adapted to protect these leaves, posts secured in one of these covers adapted to pass through the said leaves and have the opposite cover removably secured thereto, slots formed in the said leaves through which the posts are adapted to pass, the slots to be formed in such a manner and of such a length that when the leaves are pushed upward as far as they will go the totals on the bottom of each page will be all visible at once, substantially as described and for the purpose specified.

In testimony whereof I have hereunto affixed my signature in the presence of two subscribing witnesses.

ALLISON TEMPLETON.

Witnesses:
HAROLD TALLEY,
FRED FLEMING.