

# iBiz Quick Start Guide

An introductory tutorial for iBiz,  
a time-billing and invoice management app.



# Main Uses for iBiz

- Manage client contact information
- Organize projects
- Track time spent on individual tasks
- Create and send invoices and estimates
- Manage to-do lists
- Generate reports
- And much more....



# iBiz Basics

iBiz has a simple hierarchical relationship among clients, projects, and the individual activities you perform:



First, there is a list of *clients* for whom you work.



For each client you have *projects*, which are jobs you are hired to complete.



Within projects there are *job events*, smaller tasks and work sessions that are performed in order to complete the project.



# The Main iBiz Window

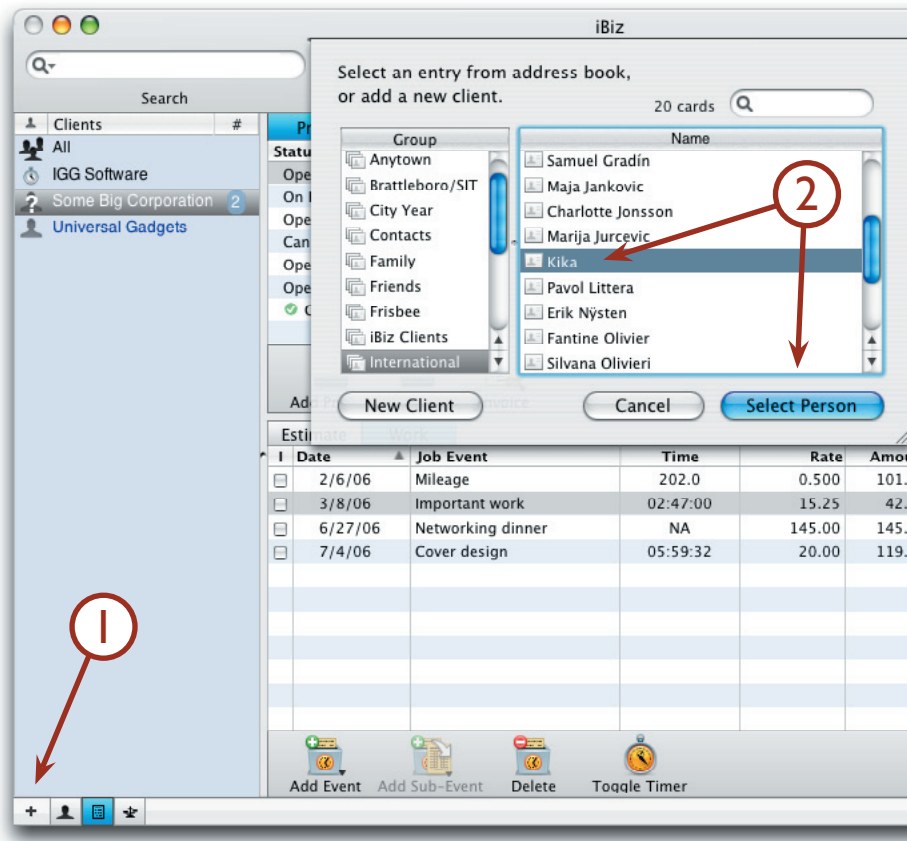
The screenshot shows the iBiz application window. The interface is divided into several sections:

- Client list:** A sidebar on the left containing a list of clients: All, IGG Software, Some Big Corporation (with a notification badge), and Universal Gadgets.
- Project list:** A table with columns: Status, #, Name, Start Date, Due Date, Time, and Earning. It lists various projects such as 'Important Project', 'Minimum wage increase', 'Big deal', 'Dive project', 'Large trade', 'Untitled', and 'alsj:d'.
- Job event list:** A table with columns: Date, Job Event, Time, Rate, Amount, and Notes. It lists events like 'Mileage', 'Important work', 'Networking dinner', and 'Cover design'.
- Info drawer:** A panel on the right showing project details for a selected item, including 'Non-billable' status, 'Type: Timed', 'Change Time: 02:47', 'Round Time: 5 Minutes', and 'Taxable' status.

At the bottom of the window, there are buttons for 'Add Project', 'Delete', 'Invoice', 'Add Event', 'Add Sub-Event', 'Delete', and 'Toggle Timer'. The status bar at the bottom shows '135,223.56/135,423.56' and 'No projects filtered out'.



# Adding a Client



1. Click the ‘+’ button in the lower-left corner of the main window.

2. Select an existing Address Book entry and click “Select Person” to add it to your iBiz client list,

or:

Click “New Client” and type in the client’s contact information to add it to your iBiz client list.



# Adding a Project

1. Select a client.
2. Make sure the “Projects” tab is selected.
3. Click the “Add Project” button – a new Untitled project will appear.
4. Double-click the project’s name, number, start date, and due date to edit them.

The screenshot shows the iBiz software interface. The 'Clients' sidebar on the left has 'Some Big Corporation' selected, indicated by a red circle '1' and an arrow. The main window has the 'Projects' tab selected, indicated by a red circle '2' and an arrow. At the bottom, the 'Add Project' button is highlighted with a red circle '3' and an arrow. The 'Untitled' project row is highlighted with a red circle '4' and an arrow. The table below shows the project details.

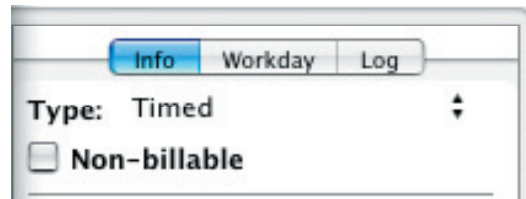
Status	#	Name	Start Date	Due Date	Time
Open	154	Important Project	2/15/06	▲ 3/15/06	(202.0) 08:46
On Hold	169	Minimum wage increase	4/9/06	8/3/06	04:00
Open	168	Big deal	6/12/06	▲ 7/12/06	00:00
Cancelled	168	Dive project	7/3/06	8/3/06	00:00
Open	170	Large trade	7/3/06	▲ 8/3/06	07:00
Open	171	Untitled	7/3/06	▲ 8/3/06	(5555.0) 555:55
✓ Closed	2	alsj;d	9/8/06	10/8/06	00:00





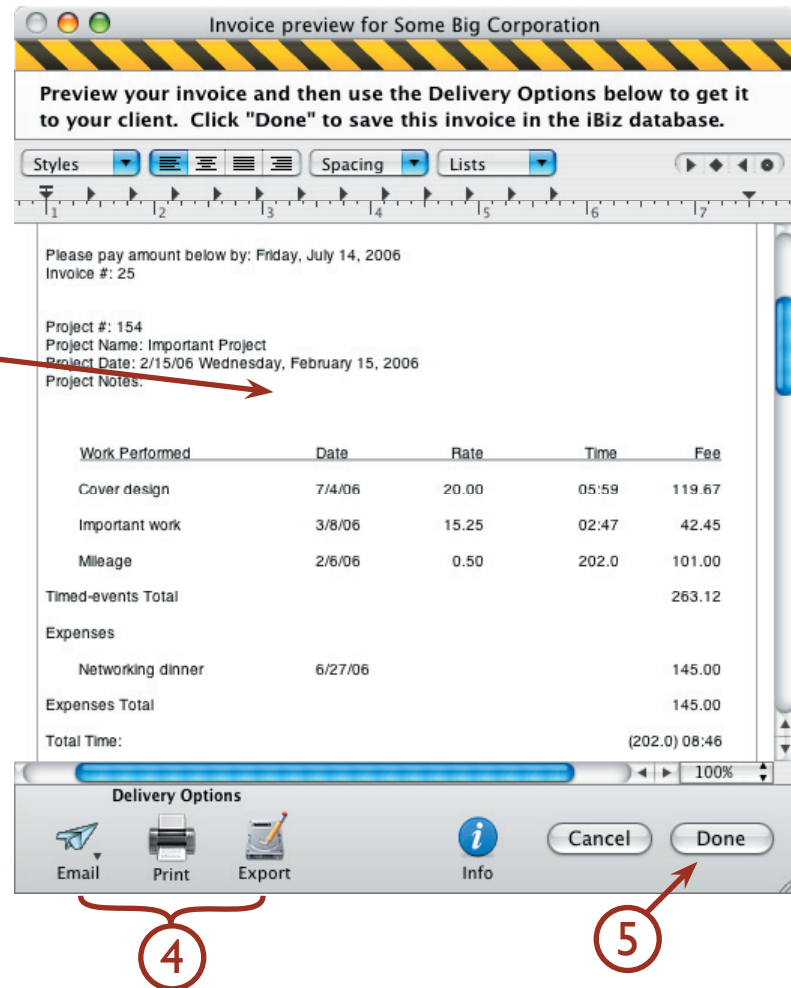
# More About Job Events

- Add a new job event to your project for each unique activity you perform.
- If you leave the project selected, you can start and stop timers by Command-clicking the iBiz dock icon.
- In addition to timing activities, job events can also be used to track project expenses, quantity items, and mileage – select the job event's type using the info drawer.



# Creating an Invoice

1. Select a client and project.
2. Click the “Invoice” button on the toolbar and choose a template – the invoice preview window will appear:
3. Make any changes to the invoice that may be necessary.
4. Choose one or more of the delivery options at the bottom left: Email, Print, and/or Export.
5. Click “Done” to save the invoice for your records.



# Receiving a Payment

1. Select the client from whom you are receiving payment.
2. Click the “Billing” tab to view a history of estimates, invoices, and payments. Any outstanding balance is displayed at the bottom of the “Amount” column.
3. Click the “Payment” button to add a new payment.

The screenshot displays a software interface for managing client payments. The interface is divided into several sections:

- Client List:** A sidebar on the left lists clients: All, IGG Software, Some Big Corporation (with a '2' next to it), and Universal Gadgets. A red arrow labeled '1' points to 'Some Big Corporation'.
- Navigation:** At the top, there are tabs for 'Projects' and 'Billing'. A red arrow labeled '2' points to the 'Billing' tab.
- Table:** A table with columns: Status, #, Date, Kind, Due Date, Tax 1, Tax 2, and Amount. The table contains the following data:

Status	#	Date	Kind	Due Date	Tax 1	Tax 2	Amount
Paid	102	7/6/06	Invoice	7/12/06	0	0	200.00
Open	101	7/5/06	Invoice	7/6/06	0.64	0	399.76
		6/24/06	Payment				-64.97
Open	100	6/10/06	Invoice	6/10/06	0.97	0	67.97
	0	6/9/06	Estimate		0	0	0
- Buttons:** Below the table are three buttons: 'Add Payment' (with a plus sign and coin icon), 'Edit' (with a pencil icon), and 'Delete' (with a red circle and slash icon). A red arrow labeled '3' points to the 'Add Payment' button.
- Summary Bar:** A blue bar at the bottom of the table area displays 'Invoice :: Paid :: 200.00'.
- Summary List:** Below the summary bar is a list of financial items: Expenses, Expenses Total, Total Time, Previous Invoice Amount, Subtotal Amount, Discount Amount (0.00%), After Discount, Tax 1, Tax 2, Subtotal+Taxes, Unpaid Balance, Retainer Balance, Project Total, and Amount Due.



# Receiving a Payment (cont.)

4. In the sheet that appears, enter the payment amount and the date on which it was received.
5. Use the “Allocate to Invoices” section to direct payment funds towards specific invoices; when an invoice has been paid in full, it will display “Paid” in the billing list.
6. Click “OK” to finish creating the new payment and save it to the billing list.

**Payment**

Payment from: Some Big Corporation

Amount: 200.00

Date received: 11/16/2006 3:15 PM

Notes: initial payment

iBank options

Put in iBank account No Value

▼ Allocate to Invoices

Invoice #	Invoice Bal.	Amt. to Apply
101	350.76	-200.00

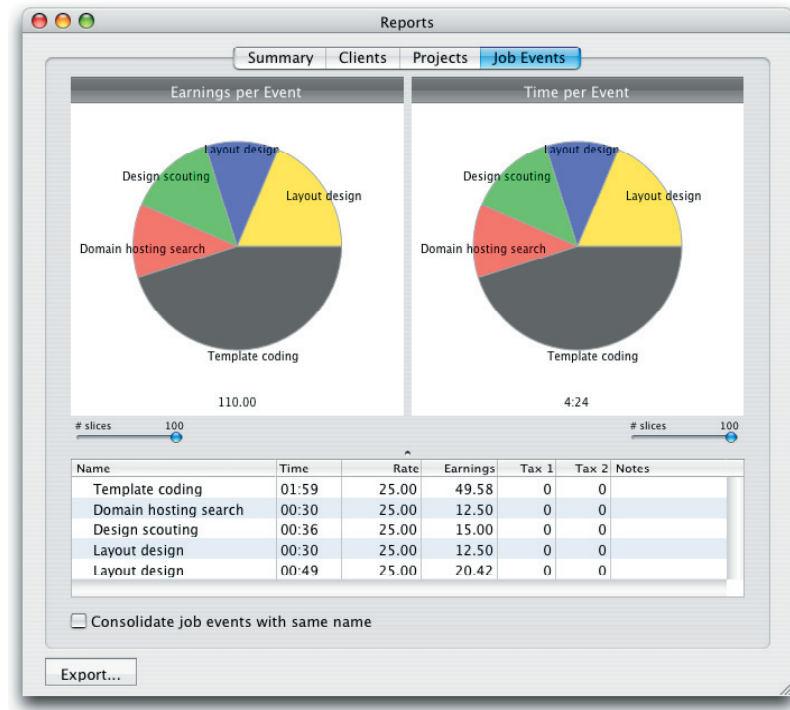
Amount remaining: -150.76

Cancel OK



# Generating a Report

1. Select the client(s) upon which you want to report.
2. Click “Report” on the toolbar.
3. On the sheet that appears, check which projects you want to report on.
4. Specify a range of dates.
5. Click “OK.”
6. In the Reports window, click the appropriate tabs to view client, project, or job event information; click “Summary” to view reports generated using installed templates.



# Wrapping Up

- We hope this quick start guide has helped you understand the basics of iBiz!
- There are *many more features* throughout the program for you to discover.
- For additional information, consult the help files located under the Help menu in iBiz.
- We also maintain online user forums where you can search, read, and contribute to discussions about iBiz (<http://www.iggsoftware.com/forums>).



**Thank you for trying iBiz!**

