iBiz Quick Start Guide

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

IGG SOFTWARE

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

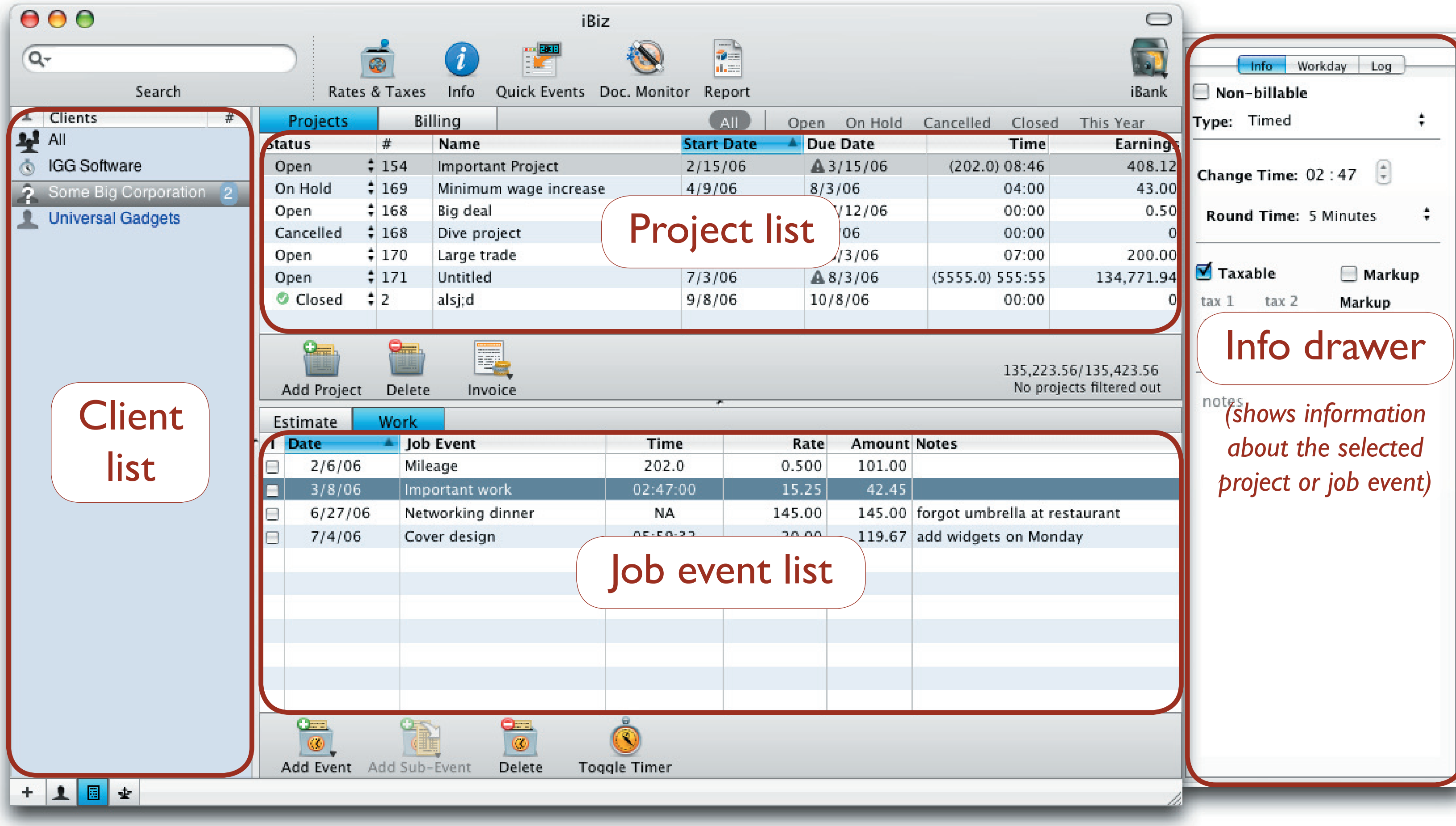
iBiz has a simple hierarchical relationship among clients, projects, and the individual activities you perform:

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

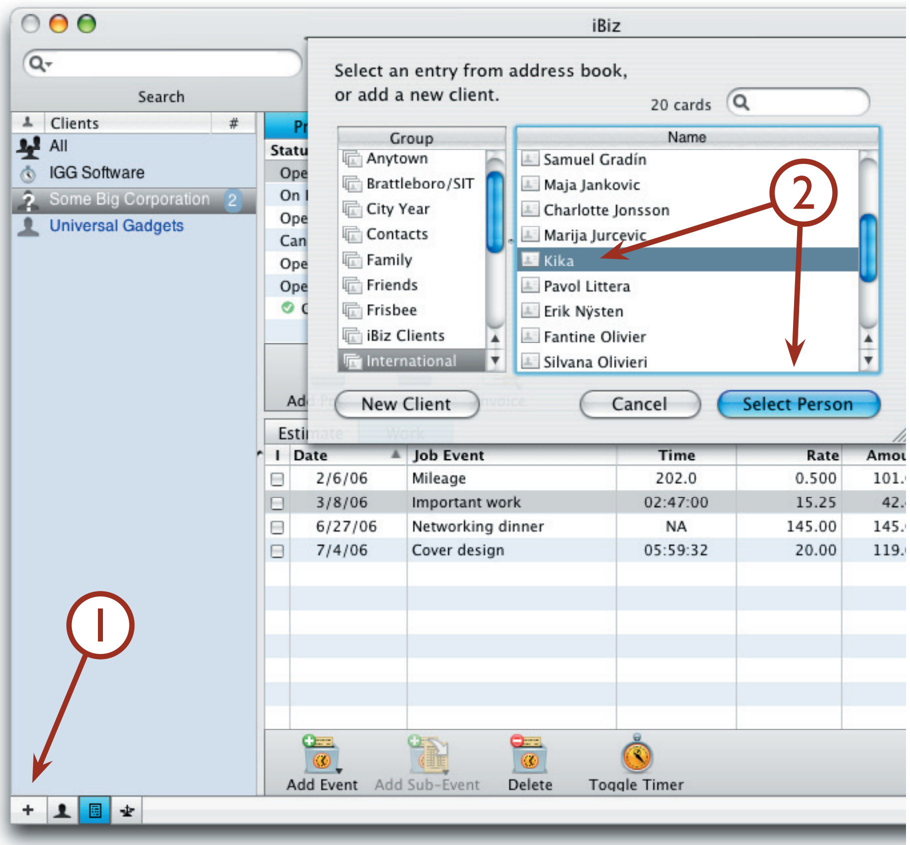
For each client you have *projects*, which are jobs you are hired to complete.

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

The Main iBiz Window



Adding a Client



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

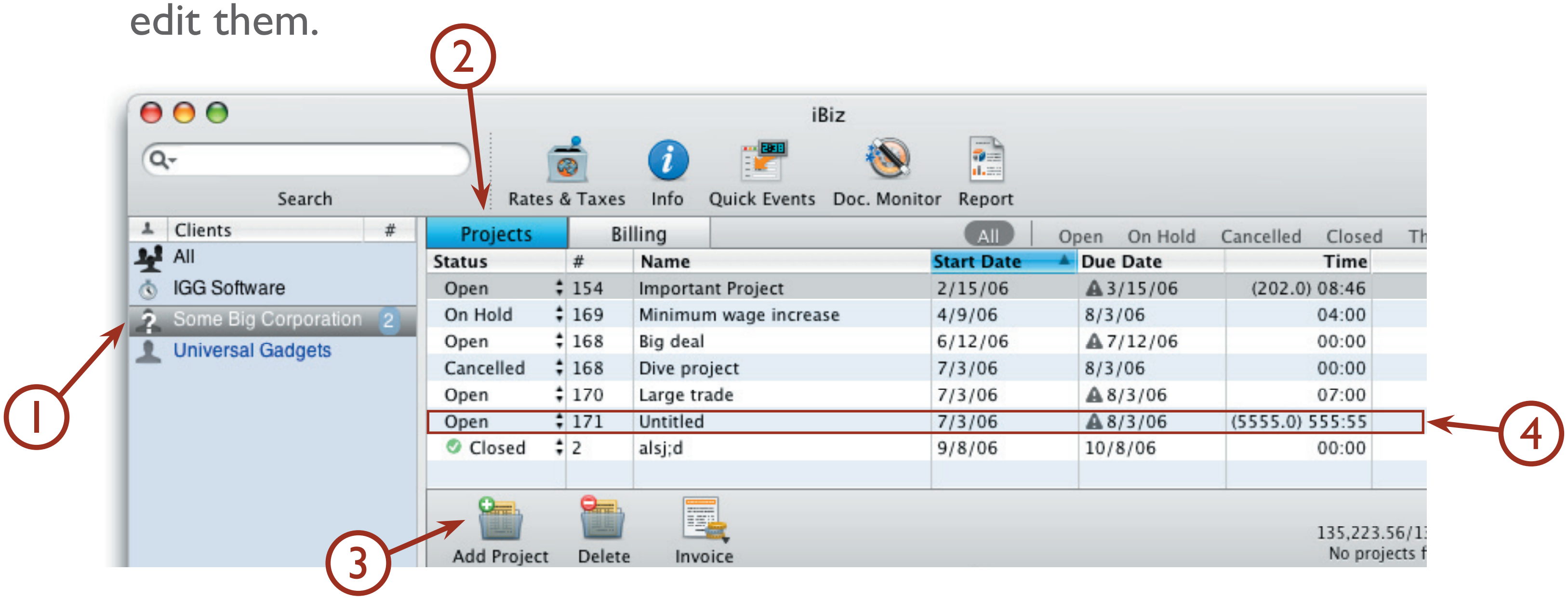
2. Select an existing Address Book entry and click "Select Person" to add it to your iBiz client list,

   or:

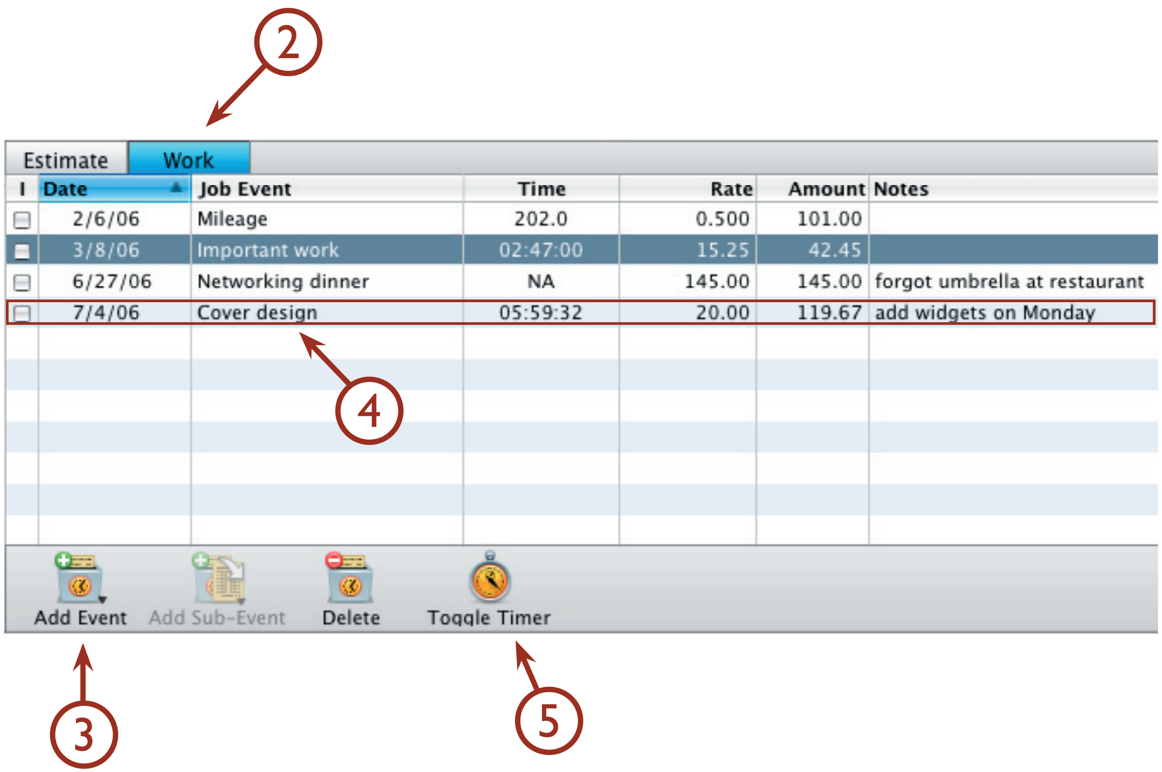
   Click "New Client" and type in the client's contact information to add it to your iBiz client list.

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.



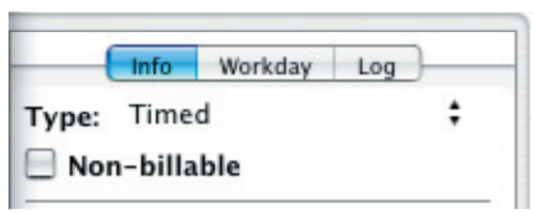
Adding Job Events



1. Select a client and project.
2. Make sure the “Work” tab is selected.
3. Click “Add Event,” and choose “Untitled” – an untitled job event will be added to the list.
4. Double-click to edit the event’s date, name, and rate.
5. Click “Toggle Timer” to begin logging time on the event.

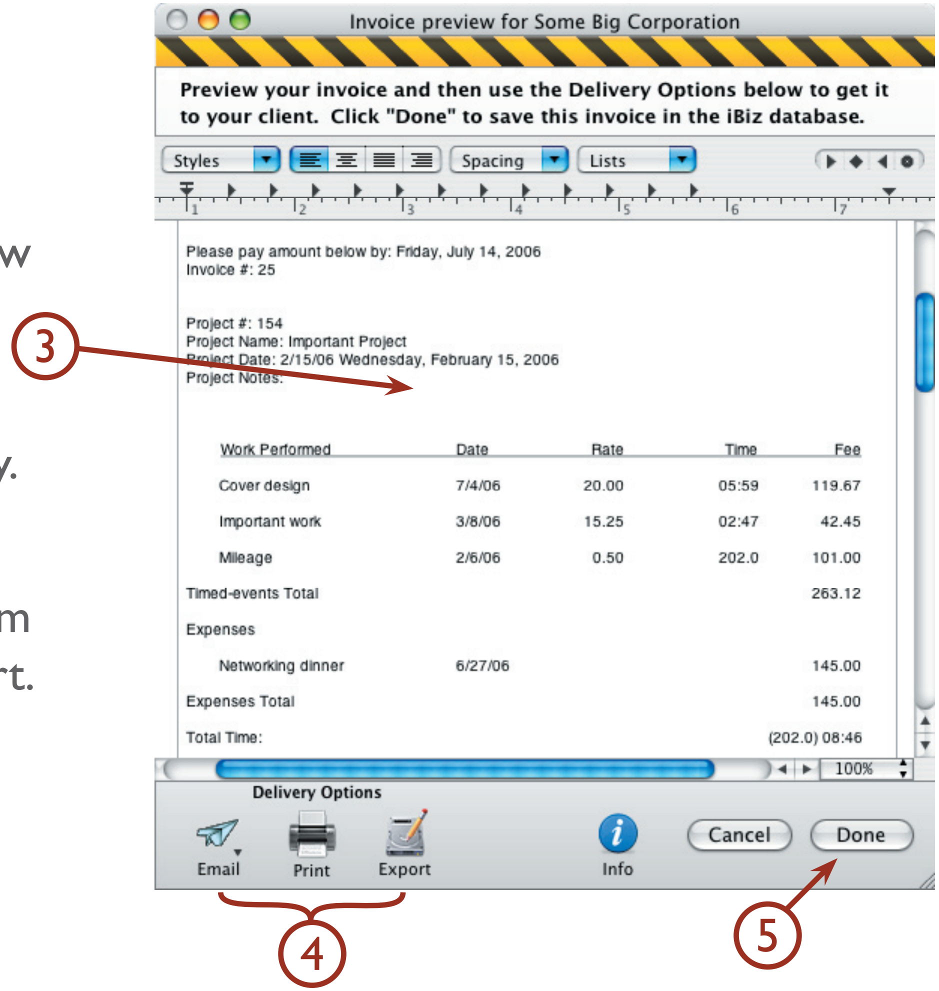
More About Job Events

- 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.



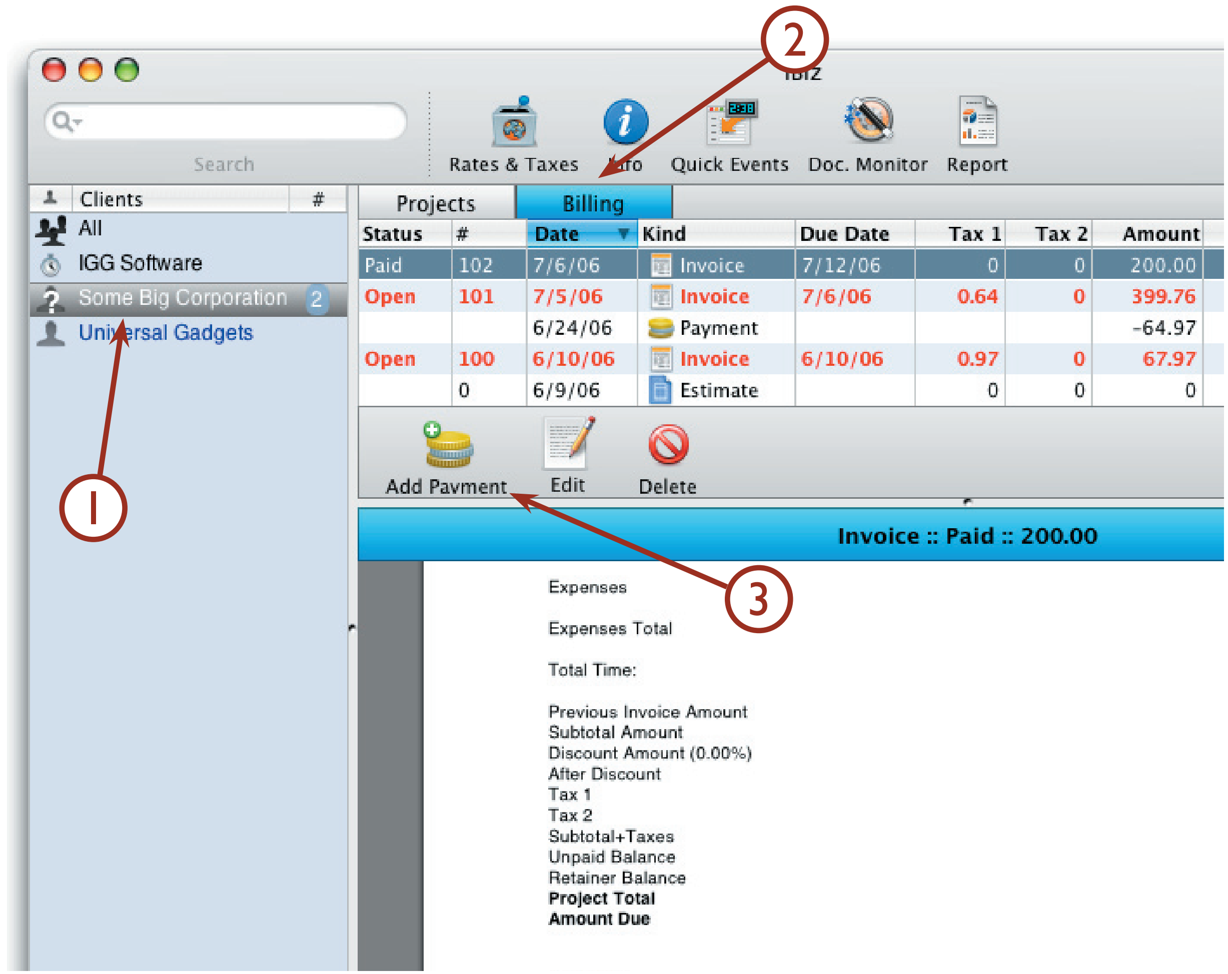
Creating an Invoice

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.

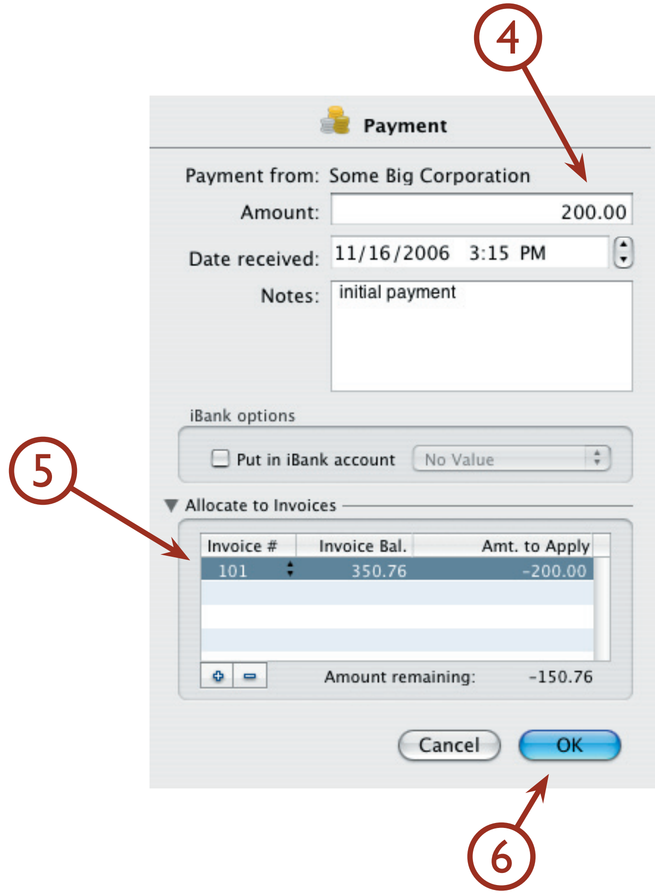


Receiving a Payment (cont.)

4. In the sheet that appears, enter the payment amount and the date on which it was received.

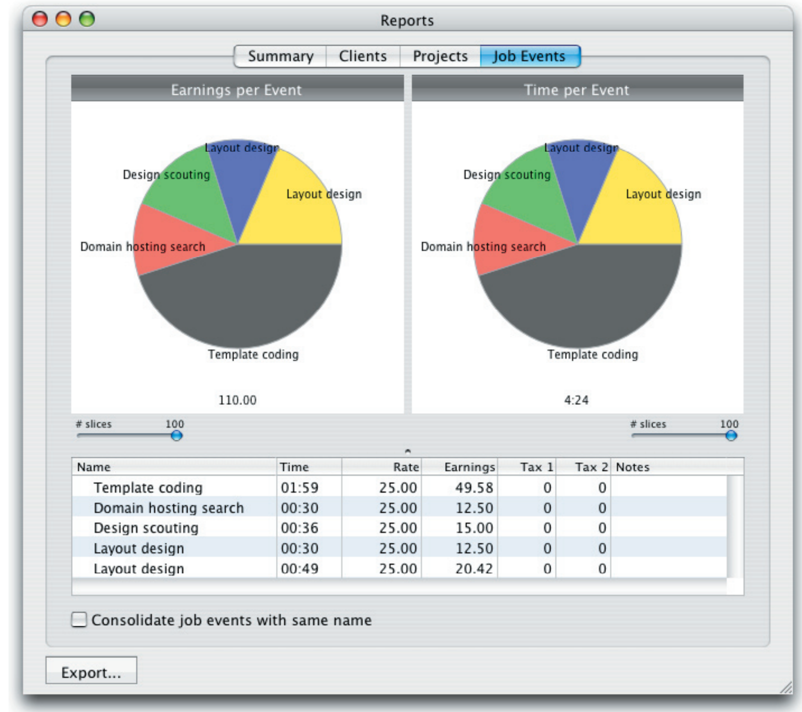
5. Use the "Allocate to Invoices" section to direct payment funds towards specific invoices; when an invoice has been paid in full, it will display "Paid" in the billing list.

6. Click "OK" to finish creating the new payment and save it to the billing list.



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!