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

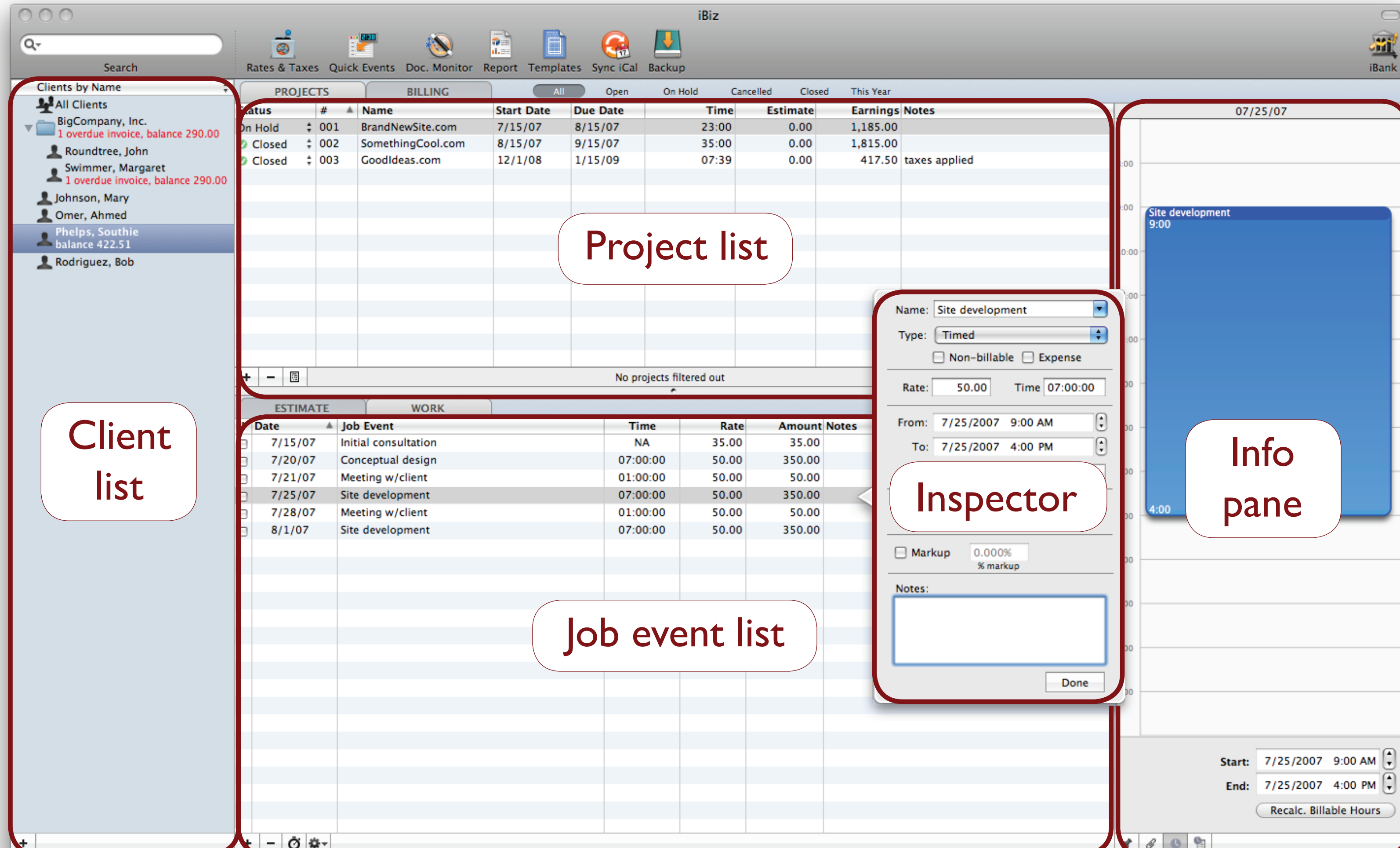
iBiz has a simple hierarchical relationship among clients, projects, and the individual activities you perform:

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

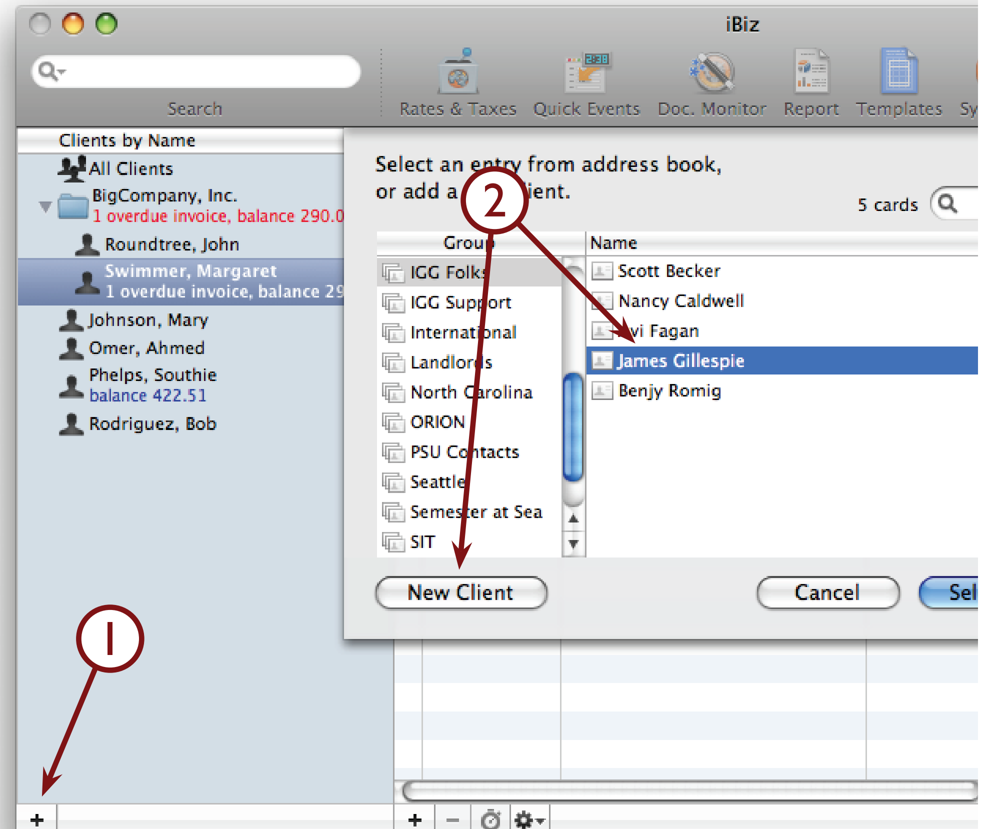
For each client you have *projects*, which are jobs you are hired to complete.

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 and choose "Add Client."

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.

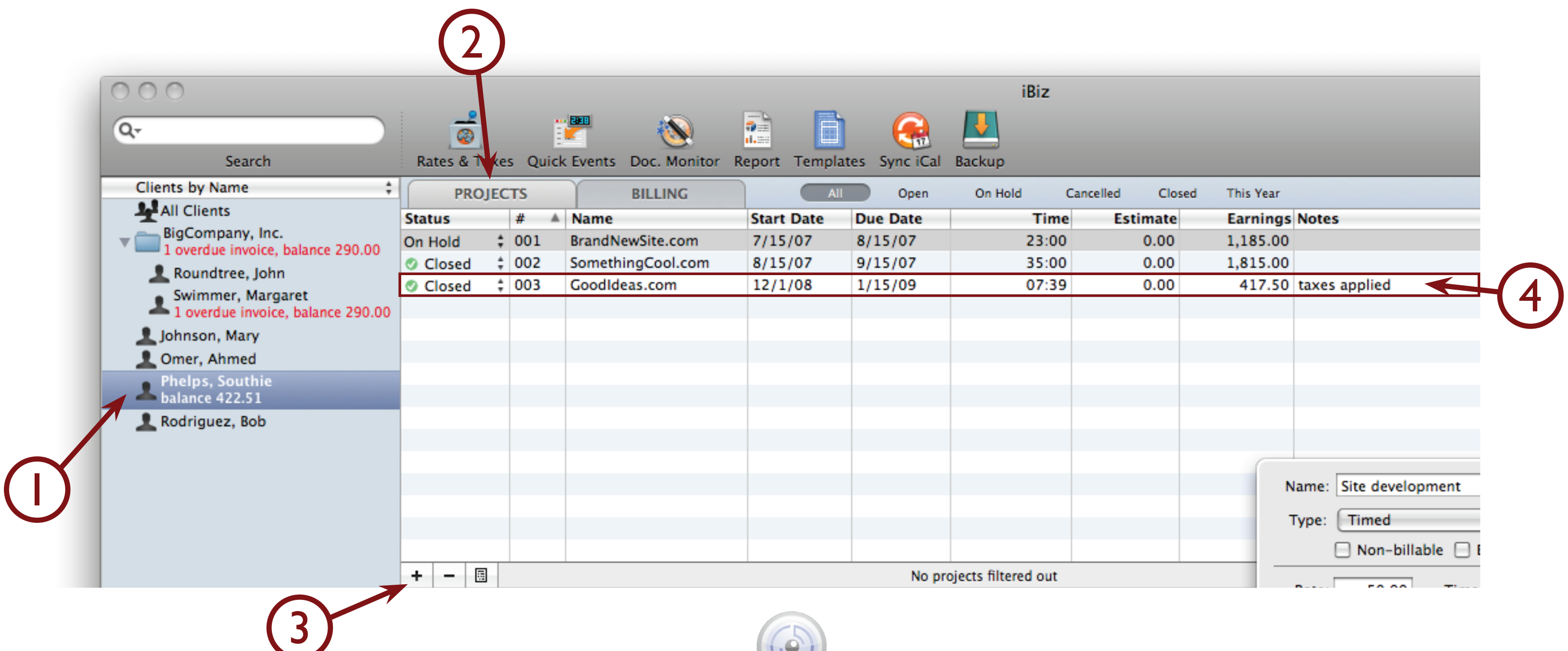
Adding a Project

1. Select a client.

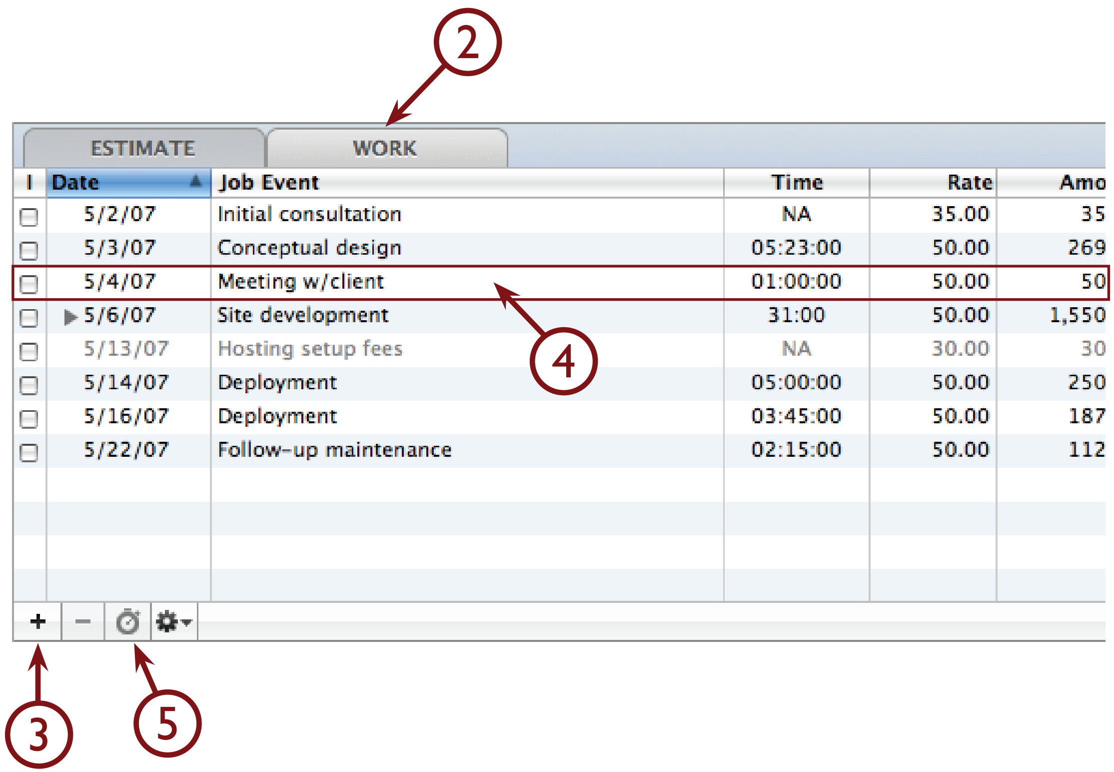
2. Make sure the "Projects" tab is selected.

3. Click the '+' button at the bottom of the project list – a new "Untitled" project will be added to the list.

4. Double-click the project to open the inspector and enter the project details.



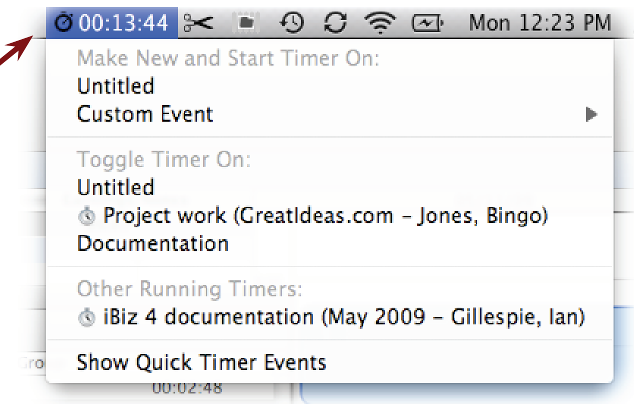
Adding Job Events

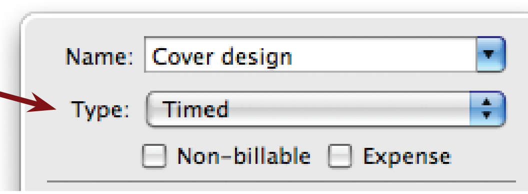


1. Select a client and project.
2. Make sure the "Work" tab is selected.
3. Click the '+' button and choose "Add Job Event" – an untitled job event will be added to the list.
4. Double-click the job event to open the inspector and enter details.
5. Click the stopwatch button to begin logging time for the selected job event.

More About Job Events

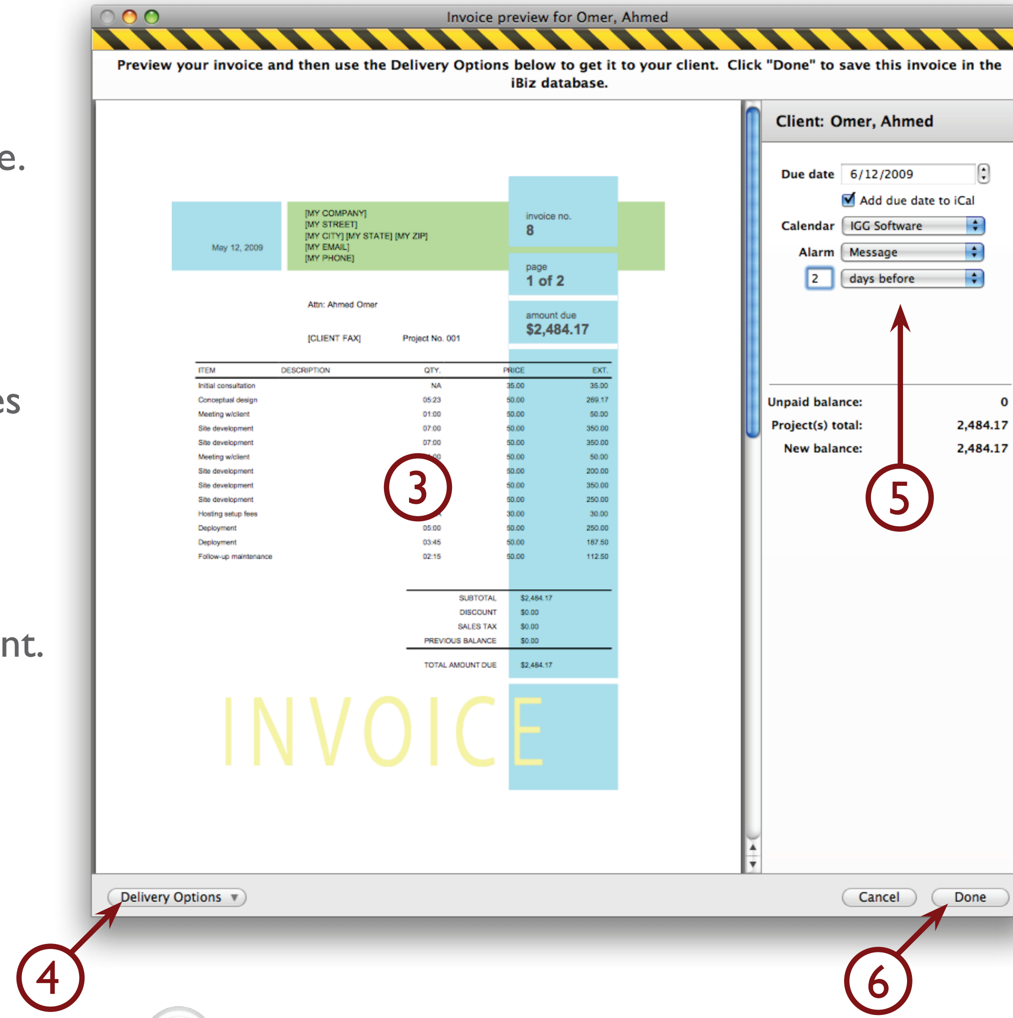
- Add a new job event to your project for each unique task you perform.
- Use the stopwatch menu in the main menu bar to view and stop any timers you currently have running.
- In addition to timing activities, job events can also be used to track project expenses, quantity items, and mileage – select the job event's type using the pop-up inspector.





Creating an Invoice

1. Select a client and project.
2. Click the button below the project list and choose a template. The invoice preview window will appear.
3. Review the information for accuracy, cancel and make changes to the project if necessary.
4. Click "Delivery Options" and choose whether to print the invoice and/or email it to the client.
5. Adjust the due date if necessary and create a reminder in iCal.
6. Click "Done" to save the invoice under the client's billing account.

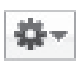


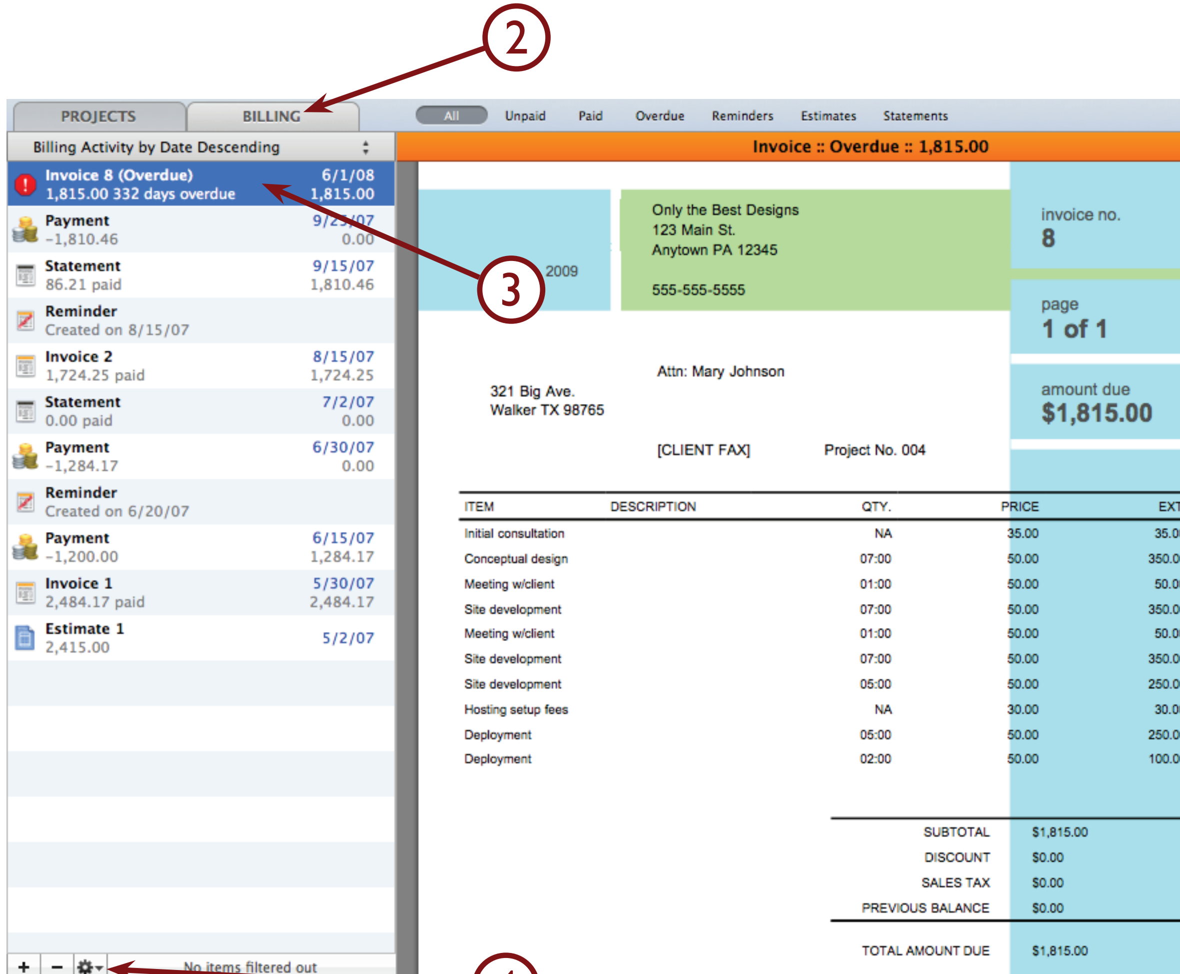
Receiving a Payment

1. Select the client from whom you are receiving payment.

2. Click the “Billing” tab to view a history of invoices, payments, and other account activity. The client’s current balance is displayed next to the most recent billing item.

3. Select the invoice for which you are receiving payment.

4. Click the  button at the bottom of the list and choose “Add Payment for Selected Invoice.” iBiz will open the popup inspector so that you can edit the payment details.

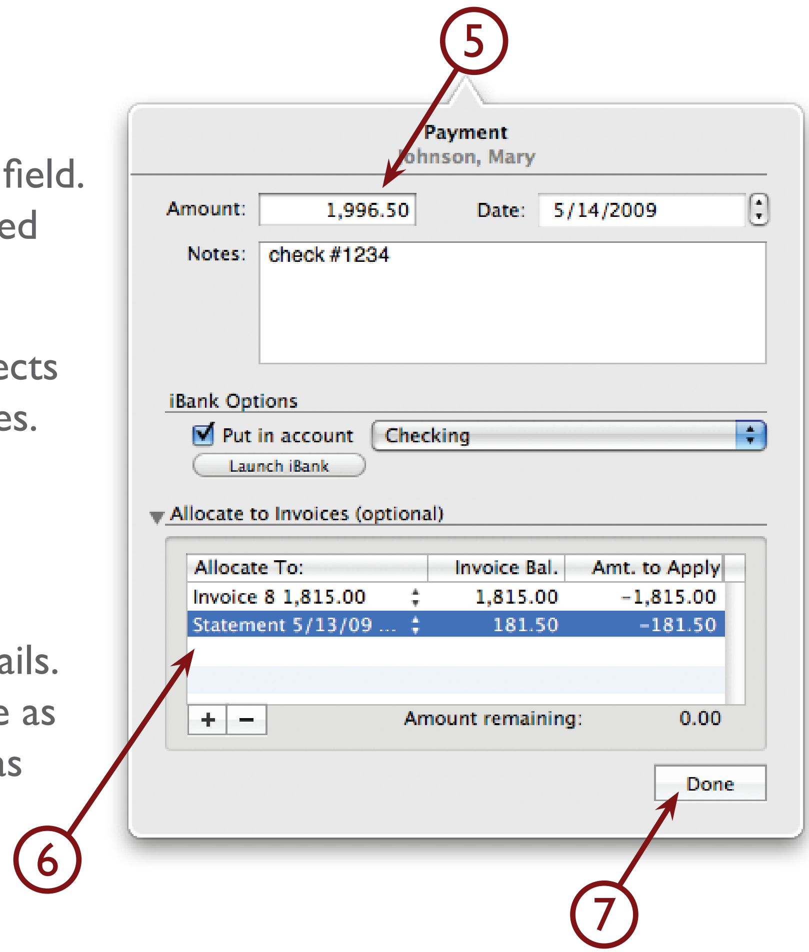


Receiving a Payment (cont.)

5. The amount of the invoice will automatically appear in the "Amount" field. Edit this amount if the payment received did not equal the invoice amount.

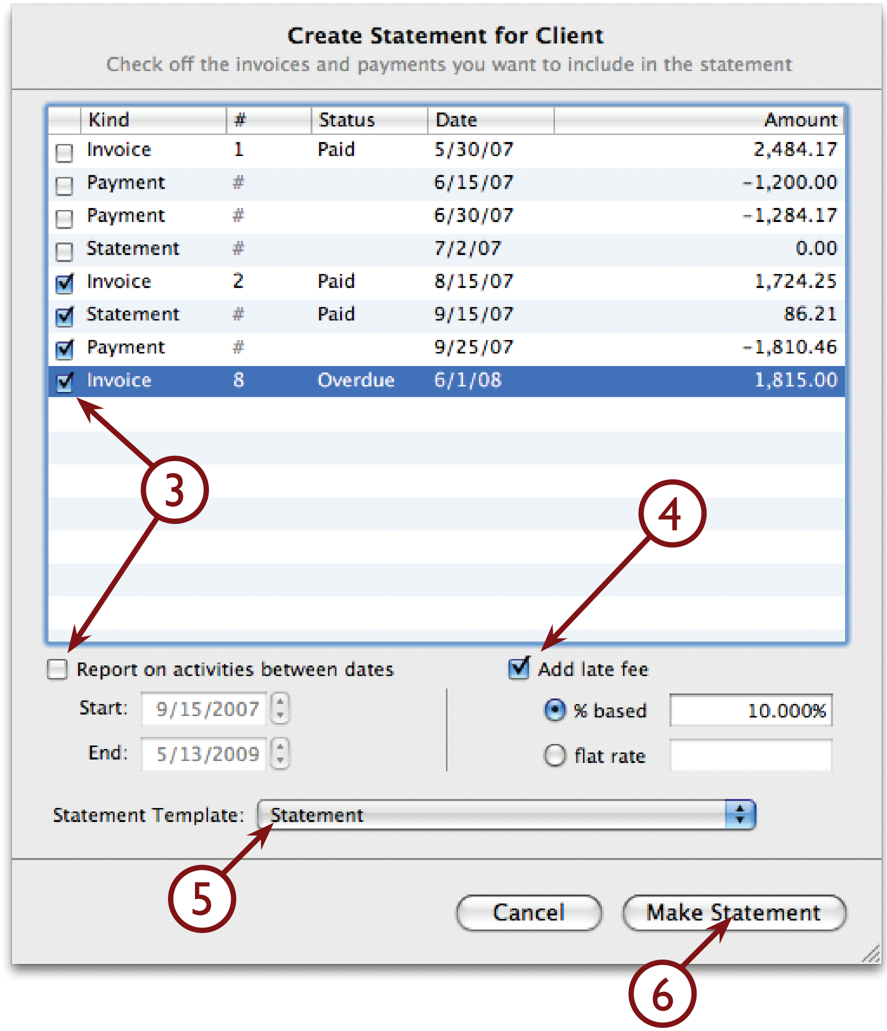
6. The "Allocate to Invoices" section directs payment funds towards specific invoices. Adjust the allocations if you want the payment directed to more than one invoice.

7. Click "Done" to save the payment details. iBiz will automatically mark the invoice as "Paid" in the billing list (assuming it was paid in full).



Creating a Statement

1. Select a client and click the "Billing" tab.
2. Click the + button below the billing list and choose "Add Statement."
3. Check off the invoices and payments you want to include on the statement, or specify dates to include all items that fall between them.
4. Add a fee if you want to charge the client for an overdue payment.
5. Choose a template to use for the statement.
6. Click "Make Statement." The statement preview window will appear.



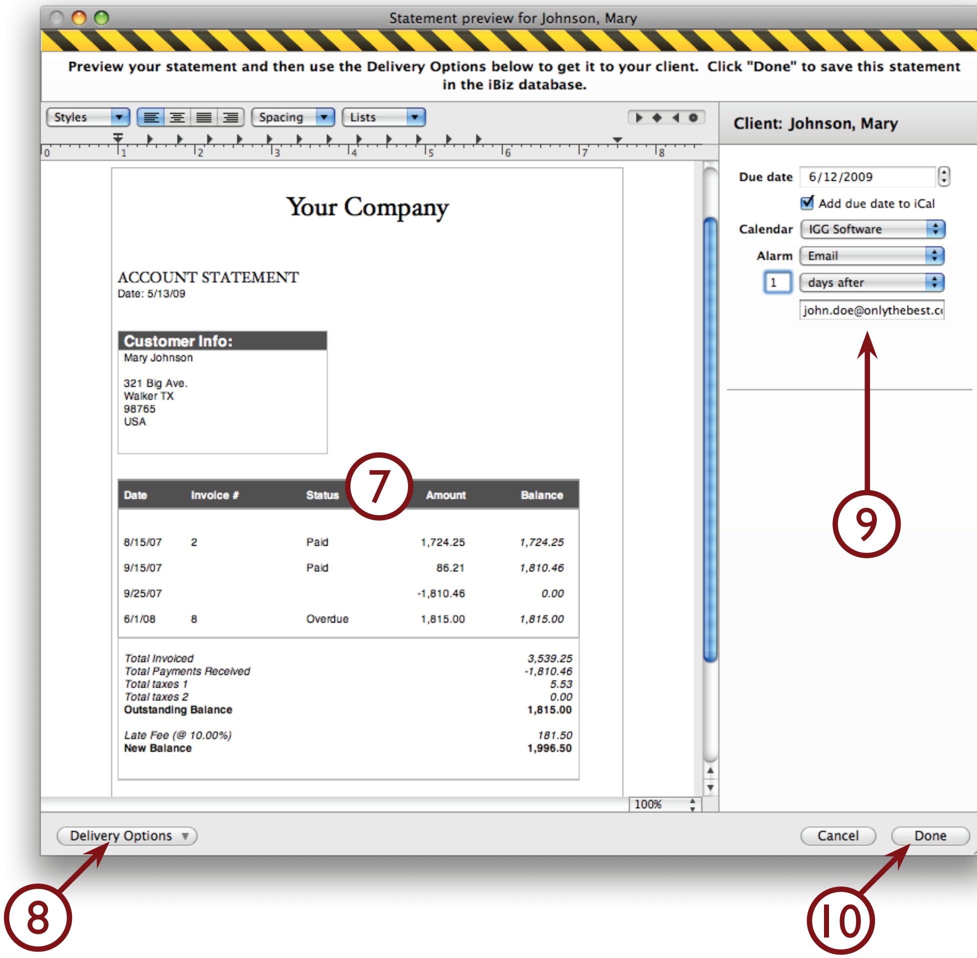
Creating a Statement (cont.)

7. Review the information for accuracy, cancel and make changes to the billing items if necessary.

8. Click "Delivery Options" and choose whether to print the statement and/or email it to the client.

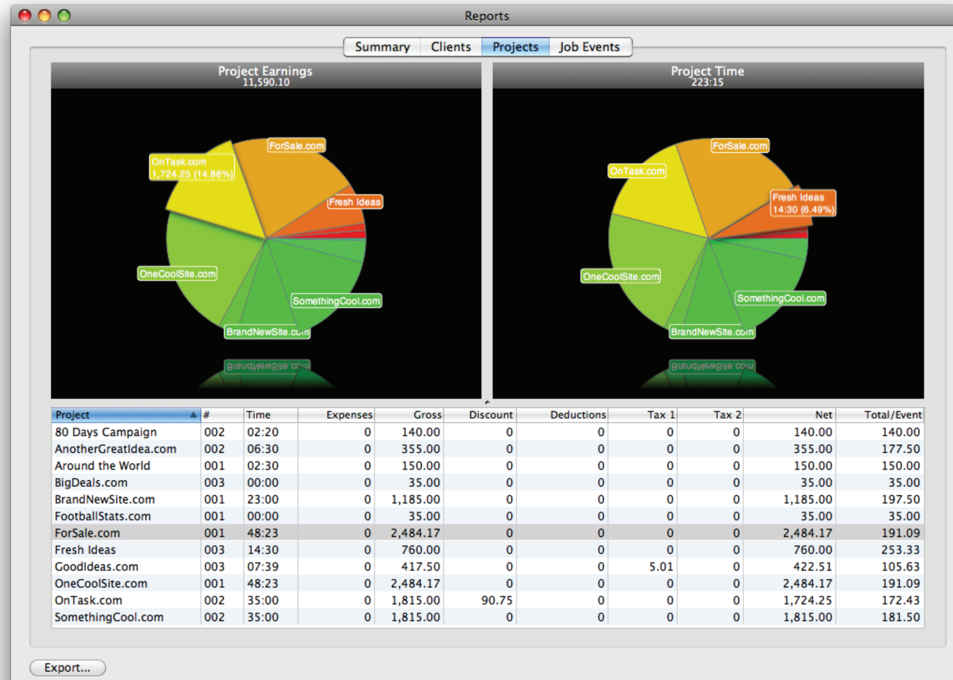
9. Adjust the due date if necessary and create a reminder in iCal.

10. Click "Done" to save the statement under the client's billing account.



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, if desired.
5. Click "Generate Report."



Project	#	Time	Expenses	Gross	Discount	Deductions	Tax 1	Tax 2	Net	Total/Event
80 Days Campaign	002	02:20	0	140.00	0	0	0	0	140.00	140.00
AnotherGreatIdea.com	002	06:30	0	355.00	0	0	0	0	355.00	177.50
Around the World	001	02:30	0	150.00	0	0	0	0	150.00	150.00
BigDeals.com	003	00:00	0	35.00	0	0	0	0	35.00	35.00
BrandNewSite.com	001	23:00	0	1,185.00	0	0	0	0	1,185.00	197.50
FootballStats.com	001	00:00	0	35.00	0	0	0	0	35.00	35.00
ForSale.com	001	48:23	0	2,484.17	0	0	0	0	2,484.17	191.09
Fresh Ideas	003	14:30	0	760.00	0	0	0	0	760.00	253.33
GoodIdeas.com	003	07:39	0	417.50	0	0	5.01	0	422.51	105.63
OneCoolSite.com	001	48:23	0	2,484.17	0	0	0	0	2,484.17	191.09
OnTask.com	002	35:00	0	1,815.00	90.75	0	0	0	1,724.25	172.43
SomethingCool.com	002	35:00	0	1,815.00	0	0	0	0	1,815.00	181.50

6. The Reports window will appear. Click the appropriate tabs to view information about your clients, projects, and job events, or click "Summary" to view reports generated from your 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://forums.iggsoft.com).

Thank you for trying iBiz!