iBiz 3.0

User's Guide

IGG SOFTWARE

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Mac

Universal

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Chapter 1: Overview

How to use this manual

Welcome to iBiz! This manual is provided to assist you in finding your way around the iBiz application. Whether you are a first-time user just learning the ropes, or an iBiz expert hunting for power user tips, we trust that the following pages will help you take advantage of everything iBiz has to offer. To get you started, here are a few notes about how to use this manual.

Browsing: To get a quick overview of what is contained in this manual, please visit the Table of Contents page and browse the chapter headings. Page numbers are included for quick reference. If your PDF viewer has a Table of Contents tab, you can also use this to easily jump between chapters.

Searching: If you have a particular question in mind, you can use the search function in your PDF viewer to locate the section of the manual that addresses it. The contents of this manual have been organized in question format to better help you find what you are looking for.

Hyperlinks: Throughout this manual you will find words or phrases that are highlighted in blue. The color indicates that the word or phrase is a hyperlink, which you can click to jump to another section of the manual for more information on that topic. These cross-references should help to ensure that you always find the right answers to your questions, no matter where you start your search.

Notes and Tips: Interspersed with the contents of this manual you will find boxes off to the sides of the page containing extra information about the topic at hand. Notes boxes usually offer caveats about certain features or explain in greater detail how certain functions work. Tips offer extra hints for power users who want to get a little bit more out of iBiz.

Menu commands: In this manual, you are often instructed to choose commands from the various menus provided in iBiz. To simplify the menu hierarchy, we chose to use the '>' character to denote each sub-menu or menu item. To illustrate, when you see "Choose Project>Show>Closed Projects," this can be interpreted as "Go to the Project menu, then go to the Show submenu, then choose Closed Projects."

About iBiz

iBiz is a time-billing application that integrates with Apple's Address Book and iCal that allows you to keep track of time and earnings for different projects, create reports, make customizable invoices to bill your clients, and track payments and balances on your work accounts.

iBiz is used by retailers, consultants, attorneys, small business owners, and many others in various professions. One of the goals in designing iBiz was to make it as versatile as possible so that it could be used in many different ways.

System requirements

iBiz 3 requires Mac OS X 10.4 or higher.

Quick 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.

To illustrate this hierarchy, suppose you are hired to design a brochure for a real estate agency. The agency itself would be your client, designing the brochure would be your project, and some of your job events might be graphic design or concept development. This is just one of the many ways in which iBiz can be used.

Common uses

Some of the common tasks you can perform with iBiz are:

- Time how long you actually spend on those tedious work tasks.
- Quickly and easily generate invoices to bill clients.
- Manage multiple projects by tracking which are complete, which have been invoiced, and which have received payments.
- Manage when projects are due by adding them to iCal.

Networking

iBiz features easy-to-use networking using Bonjour (aka Zero Conf) technology (basically, no configuration is required by the user). Using iBiz in a networking environment allows for seamless collaboration on projects and easy client management. To use networking in iBiz, be sure to download the iBiz Server/Client bundle.

New in iBiz 3

Updated look & feel**:** For easier navigation and more intuitive program usage.

Mileage events**:** Enter distances and rates to easily keep track of mileage expenses.

Non-billable events**:** Designate job events to be excluded from invoices and estimates.

Quick Timer Events**:** Quickly start a timer while you begin working, then assign it to a job event later.

Group rates (iBiz Server only)**:** Set up different billing rates for your employees and easily assign those rates to clients and projects.

HTML invoices**:** Use HTML to design your invoice and estimate templates with greater precision and flexibility.

Billing Center**:** Manage invoices, estimates, and payments all in one convenient location.

Improved reports: Quickly view summary information about your clients, projects, and job events, or design your own custom report.

Document Monitor: Let iBiz track which applications you use, then apply the time logged in each program to your job events.

Remote Access (iBiz Client only): Share your iBiz data beyond the local network over IP. Data transfers are now encrypted for security.

iCal syncing: Automatically post your job events to iCal, and update them in almost-real time.

AppleScript support**:** Write scripts to automate repetitive tasks and get the most out of iBiz.

Spotlight indexing: iBiz now publishes project and job event data to Spotlight for easy searching from anywhere in Mac OS X.

…and much more!

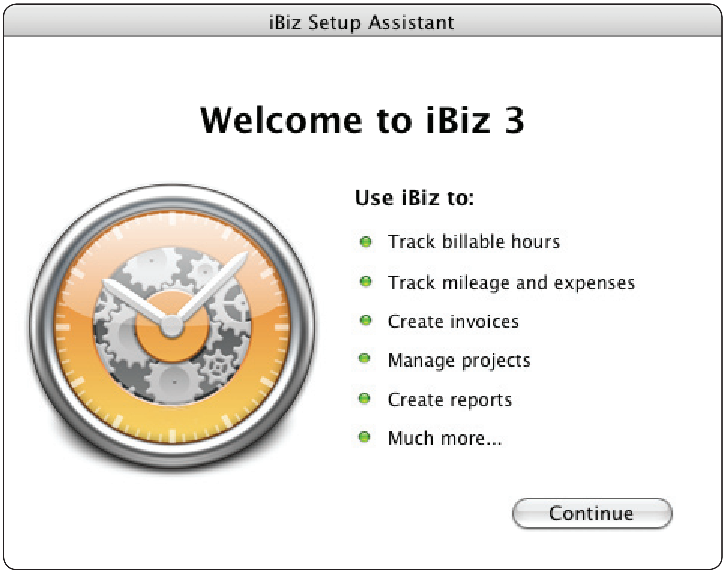
Chapter 2: Getting Started

How do I install iBiz?

First, download the appropriate version of iBiz (stand-alone or Server/Client) from our website: http://www.iggsoftware.com/ibiz/downloads.php

The file that downloads is a disk image – double-click this file to mount the image to your desktop, double-click the disk that appears to open it, and drag the iBiz program from this window to your Applications folder. Once copying is complete, close the window, then drag both the iBiz disk and disk image file to the Trash.

Double-click the iBiz icon in your Applications folder to begin using iBiz! The first time you run iBiz, the Setup Assistant will introduce you to iBiz 3:



Welcome to iBiz 3

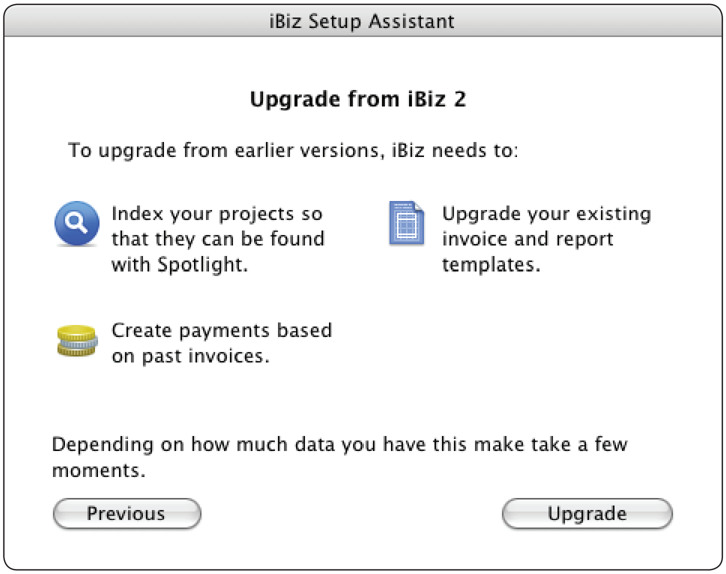
Use iBiz to:

- Track billable hours
- Track mileage and expenses
- Create invoices
- Manage projects
- Create reports
- Much more...

If you do not have Universal Access enabled, the Setup Assistant will prompt you to turn it on. Universal Access must be enabled in order to use the Document Monitor and File Cabinet features in iBiz. You can disable

Universal Access at any time under the “Universal Access” pane in System Preferences.

If you are upgrading from an earlier version, iBiz 3 will automatically import all of your clients, projects, job events, invoices, estimates, and templates from earlier versions of iBiz. Please be aware that iBiz 3 is not “backwards-compatible.” Any projects created in iBiz 3 will not be usable if viewed in earlier versions of iBiz.



iBiz Setup Assistant

Upgrade from iBiz 2

To upgrade from earlier versions, iBiz needs to:

Index your projects so that they can be found with Spotlight.

Upgrade your existing invoice and report templates.

Create payments based on past invoices.

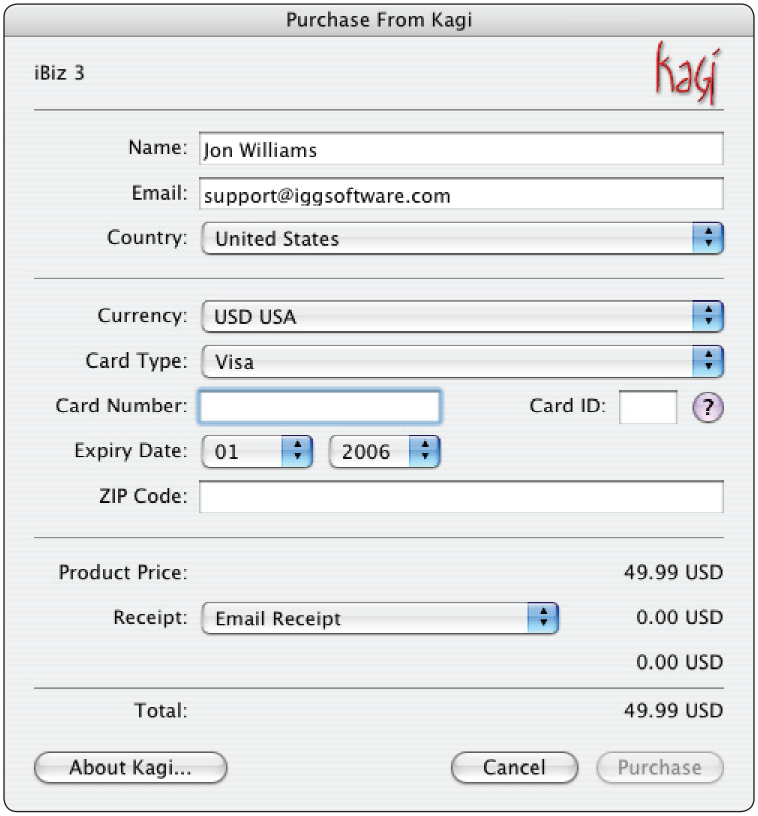
Depending on how much data you have this make take a few moments.

Next you will be prompted to purchase iBiz 3. If you are not ready to purchase yet, click “More Options,” then “Use Demo” to run iBiz in trial mode. You will be limited to 10 days of unrestricted use of iBiz, after which the software will only run for 10 minutes at a time. The purchase box will appear each time you start iBiz until you purchase a registration code.

How do I purchase and/or register iBiz?

To purchase iBiz:

If you have not already registered iBiz, you will be prompted to purchase the program each time you start it. If you are upgrading from iBiz 2, enter your old registration code and click “Continue Purchase;” otherwise simply click “Continue Purchase.” You will be connected to Kagi’s online purchase service directly through the iBiz program (you must be connected to the internet to use this service).



Purchase From Kagi

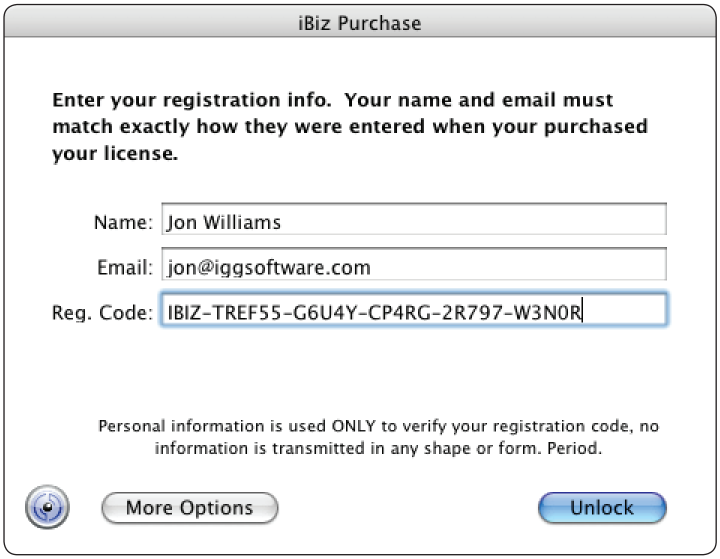
iBiz 3

Name:	Jon Williams
Email:	support@iggsoftware.com
Country:	United States
Currency:	USD USA
Card Type:	Visa
Card Number:	
Card ID:	
Expiry Date:	01 2006
ZIP Code:	
Product Price:	49.99 USD
Receipt: Email Receipt	0.00 USD
	0.00 USD
Total:	49.99 USD

NOTE *If you prefer not to purchase iBiz directly through the software, or if you wish to purchase iBiz as part of a package deal, please visit our online order page: https://secure.iggsoftware.com/store/*

Enter your name, email address, and credit card information in the window that appears. Choose whether you prefer your purchase receipt to be delivered via email or postal mail (there is an additional charge for postal delivery), and click "Purchase" to complete the order. iBiz will be registered automatically and will cease to operate in trial mode. Be sure to keep a copy of your purchase receipt for future reference; it will contain your registration information.

To register iBiz with an existing code:



Enter your registration info. Your name and email must match exactly how they were entered when your purchased your license.

Name: Jon Williams
Email: jon@iggsoftware.com
Reg. Code: IBIZ-TREF55-G6U4Y-CP4RG-2R797-W3N0R

Personal information is used ONLY to verify your registration code, no information is transmitted in any shape or form. Period.

If you are reinstalling iBiz, or obtained a registration code from our online order page, click "More Options," then "Enter License" in the purchase window. Enter your name, email address, and registration code exactly as they appear in the confirmation email. Upon successful entry of your registration info, the program's trial limitations will be disabled and you will no longer be pestered at startup.

If you need to change the registration code used for a particular installation of iBiz, see How do I change the code used to register iBiz?

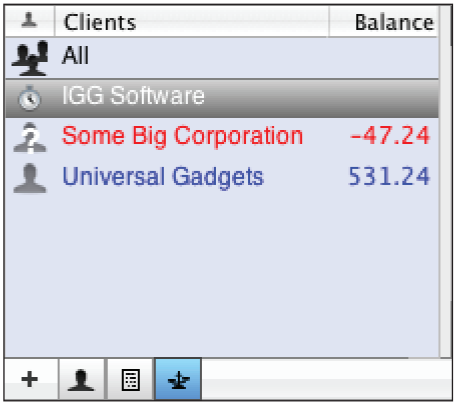
How do I quickly set up a project and start timing my work?

This section is available as a separate Quick Start Guide, which you can download from our website at: http://www.iggsoftware.com/ibiz/downloads.php#manuals

Chapter 3: Clients

What are clients all about?

The client list, displayed along the left-hand side of the main iBiz window, makes up the most basic component of iBiz. All of your projects, job events, invoices, estimates, and payments are tracked on a per-client basis – after all, somebody needs to pay you for the work you do!



Clients	Balance
All	
IGG Software	
Some Big Corporation	-47.24
Universal Gadgets	531.24

How do I add or delete clients?

The first step in using iBiz is adding clients for whom you work. There are two ways to add clients to your client list in iBiz.

iBiz integrates with Apple's Address Book application. After installing iBiz, you will find a new group in Address Book called iBiz Clients. If you already have several of your clients stored in Address Book, you can drag and drop their cards onto the iBiz Client group. Any additional clients can be entered directly into that group. Once a client has been added to the iBiz Clients group in Address Book, it will automatically show up in iBiz.

Clients can also be created directly in iBiz by clicking the + button at the bottom left corner of the main iBiz window, or by choosing Client>Add New Client. A sheet will appear asking you to select an existing Address Book person or create a new entry. After you select a client or create a new one, the client will be added to the iBiz Clients group in Address Book.

NOTE *Be careful – deleting a client will also delete all iBiz projects associated with that client. You cannot use "Undo" to restore a deleted client.*

Clients can be deleted from iBiz by choosing Client>Delete Selected Clients. Deleting a client from iBiz will also remove the client from the iBiz Clients group in Address Book, but will not delete it from Address Book altogether. Removing a client from the iBiz Clients group in Address Book will not delete the client from iBiz – in most cases, iBiz will simply replace the Address Book card.

How do I edit client information?

Double click on the client in iBiz, or choose Client>Edit Client in Address Book. This will bring up Address Book in editing mode with the appropriate client selected.

Make whatever changes are necessary to the client information in Address Book. When you are done, click the "Edit" button at the bottom of the Address Book window to end your editing session, and quit Address Book. iBiz will automatically reflect the changes made in Address Book.

If you want to completely re-associate a client in iBiz with a different person in Address Book, select the client you want to change and then choose Client>Associate Client to Address Book Person. In the sheet that appears, choose the new person/company with which you want the selected client to be associated.

What does client status mean?

In the client list on the left of the main window you may see a different icon next to each client. These icons represent the status of the client as follows:

👤 = Normal client.

⏱ = Client is currently logging time on a job event.

❔ = Client has lost its association to Address Book. See Why does my client show a question mark? below for more information.

Clients with unpaid balances appear in blue when the invoice or balance view is selected; clients appearing in red have one or more overdue invoices. See the chapter on Billing for more information about outstanding balances.

What is the "All" client for?

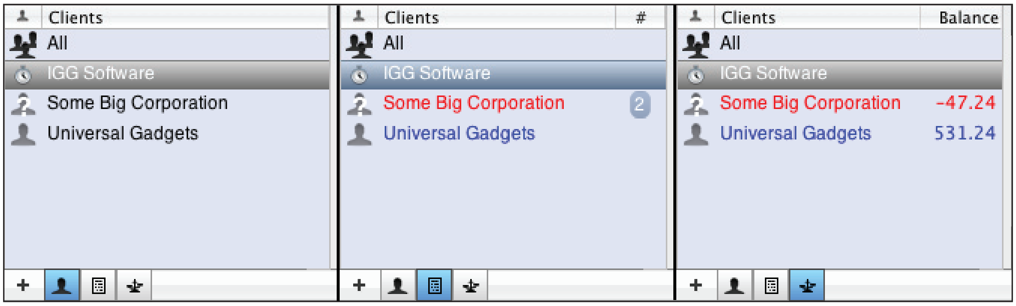
The "All" client 👥 allows you to view all projects regardless of which clients they are associated with. It also provides an easy way to check if any "orphaned" projects exist in iBiz – projects that are not associated with any client. To re-associate an orphaned project, click and drag it onto the client to which it belongs.

Can I change the way I view my clients?

To select how you want your clients to be listed – by name, company, or both – go to the 👤 Clients tab in iBiz>Preferences.

NOTE *When the invoice or balance view is selected, any client with an outstanding balance but no overdue invoices appears in blue. Any client with outstanding invoices and a non-zero balance appears in red. All other clients appear in black.*

Below the client list, there is a set of three buttons that allow you to view additional information about your clients. Click the first button to view client name and status only, click the second to view the number of oustanding invoices for each client, or click the third to view the amount of each client's balance:



Clients
All
IGG Software
Some Big Corporation
Universal Gadgets

Clients	#
All	
IGG Software	
Some Big Corporation	2
Universal Gadgets	

Clients	Balance
All	
IGG Software	
Some Big Corporation	-47.24
Universal Gadgets	531.24

You can also show or hide individual columns by checking and un-checking them under View>Client Columns. Columns can be resized by clicking and dragging the divider between two column headings. The order in which columns are displayed can be changed by clicking and dragging the column headings themselves.

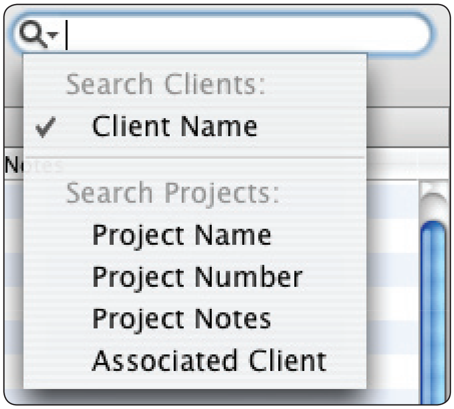
To sort your clients by status, name, number of outstanding invoices, or balance, click the appropriate column heading. Clicking the column heading a second time will reverse the direction of the sort. The "All" client will always remain at the top of the list.

iBiz also provides several options for filtering your clients. To show only clients with open projects and/or outstanding balances, choose Client>Show

Active Clients. To show only clients with overdue invoices or outstanding balances, choose the corresponding "Show" items from the Client menu. Note that filtering out clients will not delete them from iBiz, only hide them from view. You can turn off filtering at any time by choosing Client>Show All Clients.

Can I search my clients?

You can search for a client by using the Search box in the toolbar (if you don't have one, see How do I customize the toolbar?). Click the magnifying lens in the Search box and select "Search Clients: Client Name." Then type part of the client's name into the Search box.



iBiz will automatically hide any clients that do not match your search. To return all of your clients to view, click the 'X' inside the Search box to stop searching.

Why does my client show a question mark?

When a client cannot find its associated Address Book entry, it will display a question mark card next to its name in iBiz: This will happen if the client is accidentally removed from the iBiz Clients group in Address Book.

To re-associate the client, first use Address Book to recreate the client's card. Then select the client in iBiz, choose Client>Associate Client to Address Book Person, and select the appropriate Address Book entry from the sheet that appears.

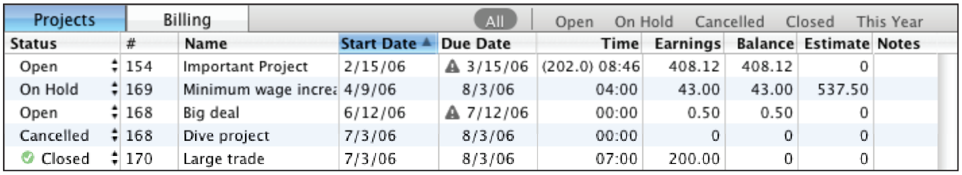
Chapter 4: Projects

What are projects all about?

After clients, projects are the next major component for tracking your work with iBiz. Projects in iBiz typically represent jobs for which you are hired. For example, if you are web designer you might have a client for whom you need to revitalize and redeploy a website, so you might name a project for that client “Website Revamp.”

If you or your business is not hired on a per-project basis, you can use projects to track the work that you do over discrete periods of time. In this scenario you would want to create a project for each time period, for example, you might want to name your projects “January Work,” “February Work,” etc. (or for whatever time period you want to track). You can then invoice those projects at the end of each time period.

The project list is available by clicking the “Projects” tab at the top of the main window or choosing View>Show Projects. With view tab selected, projects associated with the client(s) selected in the client list are visible in the top half of the main iBiz window. Selecting a project from this list will display that project’s corresponding job events in the lower half of the main iBiz window.



Status	#	Name	Start Date	Due Date	Time	Earnings	Balance	Estimate	Notes
Open	154	Important Project	2/15/06	⚠ 3/15/06	(202.0) 08:46	408.12	408.12	0	
On Hold	169	Minimum wage increa	4/9/06	8/3/06	04:00	43.00	43.00	537.50	
Open	168	Big deal	6/12/06	⚠ 7/12/06	00:00	0.50	0.50	0	
Cancelled	168	Dive project	7/3/06	8/3/06	00:00	0	0	0	
✓ Closed	170	Large trade	7/3/06	8/3/06	07:00	200.00	0	0	

How do I add or delete projects?

To add a project to the project list, select the client for whom the work is to be performed, then choose Project>New Project or click the Add Project button. Double-clicking in the blank space below your project list will also create a new project.

To delete an existing project, click to select the project (or Command-click to select multiple projects), then choose Project>Delete Project or click the Delete button. A dialog box will appear asking you to confirm that you want to permanently delete the project and all its associated job events.

How do I recover a deleted project?

Sometimes even the best of us delete a project by accident. Fear not – there is still a way to recover projects after they have been deleted!

In the Finder, browse to the following folder: ~/Library/Application Support/IGG Software/iBiz/Projects/Deleted Projects (the '~' represents your home folder). Sort the files here by Date Modified to help you figure out which one you need to restore – the date and time the file was last modified should match when it was deleted.

When you think you have found the right one, drag and drop the file onto the appropriate client in the main iBiz window. The project should load back into iBiz, ready for editing once again.

How do I edit project status/information?

Each project displays multiple status and information items directly in the project list; at the top of the list you will find headings that describe what information is contained in each column.

Project status: Clicking on the “Status” item on a project line will reveal a drop-down menu with the following selections, which can be assigned to the project at any time:

NOTE *Generating an invoice for a project will automatically set its status to “Closed.”*

- *Open:* work is currently being performed but no invoice has been generated for this project.
- ✓ *Closed:* all work has been completed and an invoice has been generated for this project.
- *On Hold:* no work is currently being performed and no invoice has been generated for this project.
- *Cancelled:* no more work is to be performed for this project, but you want to keep a record of the work already performed.

Project information: Most project information can be edited directly in the project list by double-clicking. The following columns can be edited this way:

- *Number:* by default, each new project is assigned a number equal to the previous project’s number plus one; project numbers can be changed manually at any time.

TIP *You can choose whether project numbers increment globally or on a per-client basis under the “Client” tab in iBiz Preferences.*

- *Project Name:* a descriptive name used to help you quickly identify the project.
- *Start Date:* used to track the date work began on the project.

TIP *You can choose whether to enter dates using the pop-up-calendar or manually under the "General" tab in iBiz Preferences.*

- *Due Date:* used to track the date by which all work on the project must be completed; by default, this date is set to 10 days after the start date. A gray exclamation image ⚠ appearing in the due date column means the project is overdue and incomplete.
- *Notes:* used to track additional comments or information about the project; these can also be viewed or edited via the info drawer.

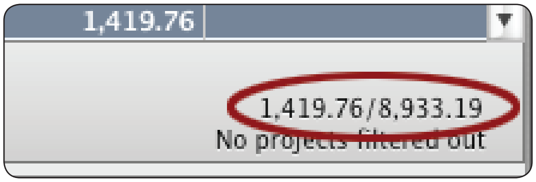
In addition to the user-editable columns just described, each project also displays the following information in the project list. These columns reflect information recorded by the project's corresponding job events and cannot be directly edited:

- *Time:* displays the total time of all work performed for the project. If a project contains quantity and/or mileage events in addition to timed events, the total quantity will be displayed in parentheses next to the total time.
- *Earnings:* displays the total earnings of all work performed for the project.
- *Balance:* displays the total earnings minus any payments made towards the project (this includes payment events and retainers only, not payments in the billing section). Job events that have been

invoiced are not included in the balance calculation. If the balance is negative, it will appear in red.

- *Estimate:* displays the total estimated earnings for the project (see How do I create an invoice or estimate? for more information on estimate events). A gray exclamation image ⚠ appears in the estimate column when the project earnings have exceeded the estimate value.
- *Client:* displays the client with whom the project is associated (if you don't see this column, see Can I change the way I view my projects?).

At the bottom right of the project list, you will see two numbers separated by a slash. These represent the total balance and total earnings, respectively, of the displayed projects. Please note that these totals do not represent all projects associated with the selected client(s); the totals only reflect what is visible onscreen. Projects that have been filtered out will not be counted in these totals, likewise during a search only the displayed results will be tallied.



1,419.76

1,419.76/8,933.19

No projects filtered out

Some additional project information is set using the info drawer. See discounts, iCal synchronization, To Do items, and File Cabinet for more information.

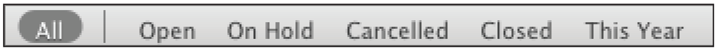
Can I change the way I view my projects?

TIP *Projects are displayed only for the client selected in the clients list. Selecting multiple clients will display all associated projects; clicking the "All" client will display all of your projects.*

The project list can be sorted by any of the column headings at the top of the list. Clicking a heading once will sort the projects according to the information in that column; clicking a second time will reverse the direction of the sort.

You can show or hide individual columns by checking and un-checking them in View>Project Columns. Columns can be resized by clicking and dragging the divider between two column headings. The order in which columns are displayed can be changed by clicking and dragging the column headings themselves.

To filter out projects based on their status, use the buttons displayed next to the Billing tab above the project list. Click the appropriate button(s) to hide any combination of open, closed, on hold, or cancelled projects, or projects with a start date in the current year:



NOTE *When filtering projects, iBiz will display how many projects are currently displayed out of the total at the bottom of the project list. When all projects are showing, "No projects filtered out" will be displayed.*

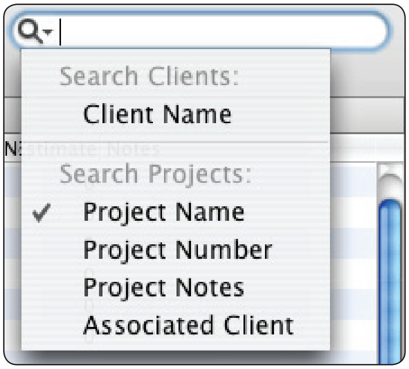
Clicking a second time will reveal the corresponding projects again. These same filters are also located under Project>Filter Out. Note that filtering out projects will not delete them from iBiz, only hide them from view. You can turn off project filters at any time by choosing Project>Show All Projects.

To set the fiscal year start/end date used when filtering “This Year,” Choose iBiz>Preferences and click the “Advanced” button. Change the month and day to indicate the desired date.

Can I search my projects?

You can search for a project by using the Search box in the toolbar (if you don’t have one, see How do I customize the toolbar?). Click the magnifying lens in the Search box and select any of the options listed under “Search Projects.” Then begin typing your search criteria into the Search box.

iBiz will automatically hide any projects associated with the selected client that do not match your search criteria. To return all of your projects to view, click the ‘X’ inside the Search box to stop searching.



How do I move or reassign a project from one client to another?

It’s as easy as drag and drop! To reassign a project to a different client, click the project and drag it onto client with which you want it to be associated. Trying to copy & paste a project from one client to another won’t work – the copy command will automatically copy whatever job events are selected instead of the selected projects.

How do I apply a discount to a project?

To apply a discount to a project, click the project to select it, then open the info drawer. Check “Apply % discount” and enter a percentage to the right to discount each of the project’s job events by that rate.

Once a discount has been applied, the project’s job events will show discounted amounts in the Amount column. The amounts will be displayed in orange to indicate that they have been discounted.

How do I assign a default rate to a project?

To assign a default rate to a project, click the project to select it, then open the info drawer. Check “Use fixed rate” and enter a rate to the right. Any new job events created for that project will be assigned the rate indicated, regardless of whether they are blank or based on custom events. Existing job events will not be affected. Note that this option only sets a default rate; individual job event rates can still be modified as necessary once they have been created.

How do I synchronize projects with iCal?

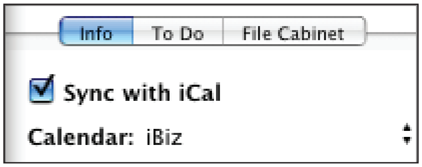
TIP *Synchronizing a project, then using iCal to publish the project’s calendar to a live web page is an easy way to keep your clients up-to-date on the project’s progress.*

Projects can be synchronized with iCal calendars via the OS X Sync Services engine for “almost live” updating. This allows you to display any job events associated with a project in iCal for an easy workday, workweek, or timesheet-style view. To Do items cannot be synchronized with iCal.

To synchronize a project with iCal: First select it in the project list, then open the info drawer. Choose a calendar from the drop-down list and then check “Sync with iCal.” (If no calendars are available, choose Project>Sync with iCal>Refresh Calendars and try again.) iBiz will present you with three options for the first sync: Sync Both Ways, Just Add iCal Events to Project, or Don’t Sync. Whichever option you choose, iBiz will do this immediately. After this initial sync is performed, subsequent syncs will always occur in both directions.

NOTE *Recurring iCal events can only be synchronized in one direction – iBiz will import recurring iCal events, but changes made to them in iBiz will not be reflected in iCal. To ensure that recurring events stay consistent when synchronized, be sure to edit them in iCal.*

Once your project has been linked to an iCal calendar, choose Project>Sync with iCal>Fast Sync to perform a one-time synchronization. You can have iBiz synchronize your projects automatically by checking “Automatically” under the same menu. Each project must be synced with a unique iCal calendar, otherwise duplication of job events may occur.



☑ Sync with iCal

Calendar: iBiz

If iCal synchronization does not work: Turn syncing off for the project, choose Project>Sync with iCal>Refresh Calendars, re-select the appropriate calendar, turn syncing back on, then choose Project>Sync with iCal>Fast Sync. This will often jump-start the synchronization process.

NOTE *Each iBiz project should be assigned a unique iCal calendar. Because of the way Sync Services works, multiple projects (within the same copy of iBiz) that are assigned the same iCal calendar will not synchronize properly.*

And be patient - sometimes the first sync can take a few minutes to register! Once things get going, however, you should see changes updated almost immediately between iBiz and iCal.

To force a job event to be sent to iCal during the next synchronization, Command-click the job event and choose “Force Add to iCal on Next Sync.”

To create job events from iCal events: If you want to populate a project with iCal events, or if you simply want to add iCal events to an existing project, choose Project>Sync with iCal>Reset Events and click OK. iBiz will import any events from the specified calendar between the project’s start and end date as job events. None of your existing job events will be deleted; duplicates will be created if you already have job events matching some of the iCal events.

You can also create iCal events from your project due dates. First, enable the iCal toolbar button – if you don’t know how to do this, see How do I customize the toolbar?. Select a project, click the iCal toolbar button, and choose “Make Event for project due date” from the drop-down menu. An event will be created in the selected iCal calendar on the date the project is due.

How do I use To Do items?

To Do items are designed to allow you to attach reminders to a project that don’t need to be tracked as job events. For example, you may need a reminder to schedule that appointment by a certain date, or to pick the kids up after work.

To add To Do items to a project: Click the project to select it, then open the info drawer. Click the “To Do” tab to reveal that project’s To Do items. Click the + button at the bottom of the info drawer to create a new, untitled To Do item. To remove a To Do item from the list, select it and click the − button.

The checkbox to the left of each To Do indicates whether or not the item has been completed: a check ☑ means complete; blank ☐ means incomplete. Completed To Do’s will appear in gray. The text of the To Do can be edited by double-clicking it. The small stack of bars to the right indicates the To Do item’s priority: none ☰, low ☰, medium ☰, or high ☰. A To Do item’s priority can be changed by clicking the priority icon.

To assign a due date: Select a To Do item in the list, then check “Due date” at the bottom of the info drawer. Type in the appropriate due date in the box to the right. A gray exclamation image ⚠ appears next to a To Do item when the item is overdue.

To post To Do items to iCal: Select a To Do item in the list, then click ⚙▾ or the 📅 iCal toolbar button (if you don’t have an iCal button, see How do I customize the toolbar?) and choose “Make iCal To Do” from the drop-down menu. The To Do item will be posted to the iCal calendar selected under the “Info” tab of the info drawer (“Synchronize with iCal” does not need to be checked to post To Do items).

To import To Do items from iCal: Click the ⚙▾ button and choose “Import iCal To Dos.” Any To Do items associated with the iCal calendar selected under the “Info” tab of the info drawer will be added to your To Do list (“Synchronize with iCal” does not need to be checked).

Viewing options: The To Do list can be sorted according to status, name, or priority by clicking the appropriate column headings. Clicking a second time will reverse the sort order. To Do items can also be filtered by choosing “Show: Completed” or “Show: Incomplete” from the drop-down menu at the bottom of the info drawer. Select “Show: All” to return all To Do items to view.

How do I use the File Cabinet?

The File Cabinet allows you to link external files with your iBiz projects. For example, say that part of your work on a project involves editing a graphics file in Photoshop. The File Cabinet allows you to open the document from within iBiz and automatically track how much time you spend working on it, if desired.

To add files to the File Cabinet: Select a project from the project list, then open the info drawer. Click the “File Cabinet” tab to reveal that project’s File Cabinet. There are two ways to add files to the File Cabinet: either click the + button at the bottom of the drawer and choose a file on your computer, or drag and drop a file or folder from the Finder onto the File Cabinet.

Once a file has been added, choose an option from the “Action When Opening File” menu at the bottom of the File Cabinet tab:

- Create Event and Time – when the file is opened from within iBiz, a new job event will be created and a timer will be started on that event. Select which of your custom job events to use from the “Create Job Event” menu. Each time you switch to/from that file, the timer will be started/stopped on the job event created. Close the file to stop logging time on that activity.

- Time Selected Event – when the file is opened from within iBiz, a timer will be started for whatever job event is currently selected in the job events list. Each time you switch to/from that file, the timer will be started/stopped on the job event selected. Close the file to stop logging time on that activity.

NOTE *Logging time automatically through the File Cabinet requires that Universal Access is enabled on your computer. Make sure "Enable access for assistive devices" is checked under the Universal Access pane in System Preferences.*

- Do Nothing – when the file is opened from within iBiz, nothing else will happen.

To open a file from within the File Cabinet: Simply double-click it in the list. The file will open, and any associated actions will be triggered. You can also Control-click a project in the project list to view the contents of its File Cabinet.

To remove a file from the File Cabinet: Select it in the list and click ⊟ at the bottom of the File Cabinet tab. The original file will not be deleted from your hard drive; it will simply be removed from the File Cabinet list in iBiz.

How do I set up a retainer for a project?

If you often receive advance payment for the work that you do, and want to manage these deposits on a per-project basis, you can use iBiz to set up retainers. In most cases, the billing section should handle advance payments satisfactorily, but some users may be more comfortable using the retainer system.

To set up a retainer: Select a project, then choose Project>Show Retainer Activity to open the retainer sheet. Click the button to add deposits to the retainer. Double-click each line item to enter a date, title, and amount, along with any accompanying notes. The checkboxes are used to indicate whether an invoice has been generated since the deposit was entered.

Once a deposit has been added to the retainer, its amount will automatically be deducted from the project's earnings (reflected in the project balance column). After it is checked off, the deposit will no longer be included in the project balance. If the retainer is larger than current earnings, the project balance will be negative and will be shown in red. Click "OK" to save any changes made to the retainer and return to the main iBiz window.

NOTE *For information on displaying retainer information on invoices, please consult the iBiz Template manual. This document is available on our website at the following address: http://www.iggsoftware.com/ibiz/downloads.php*

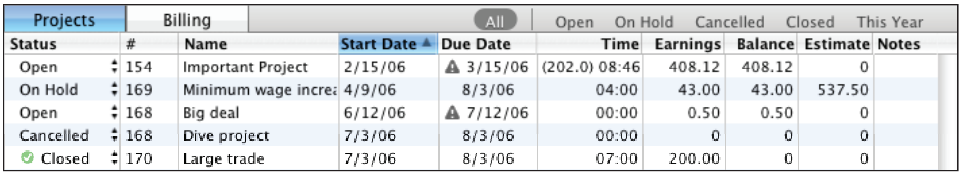
To delete a deposit from the retainer: Open the retainer sheet, select a deposit, and click the 🚫 button to remove it from the list. The project balance will automatically be updated to reflect the change in the retainer.

Chapter 5: Job Events

What are job events all about?

In iBiz, job events fall under clients and projects, and are the main component in for tracking work estimated and performed on a project. They can track work according to an hourly rate, or account for flat fees. Mileage can be recorded using job events, as can one-time project expenses.

The job event list will appear in the bottom half of the main iBiz window once you have a client and a project selected. Job events can either be added to a project under the Estimate tab as the first step in creating an estimate, or under the Work tab in order to track the work you actually perform.



Status	#	Name	Start Date ▲	Due Date	Time	Earnings	Balance	Estimate	Notes
Open	154	Important Project	2/15/06	⚠ 3/15/06	(202.0) 08:46	408.12	408.12	0	
On Hold	169	Minimum wage increa	4/9/06	8/3/06	04:00	43.00	43.00	537.50	
Open	168	Big deal	6/12/06	⚠ 7/12/06	00:00	0.50	0.50	0	
Cancelled	168	Dive project	7/3/06	8/3/06	00:00	0	0	0	
✓ Closed	170	Large trade	7/3/06	8/3/06	07:00	200.00	0	0	

How do I add or delete job events?

To add a job event to the job event list, first make sure you have the "Projects" tab selected at the top of the main iBiz window, and have selected the appropriate client and project. Click the "Estimate" tab in the lower half of the window (or choose Project>Show in Lower Table>Estimate) if you want to start adding events to an estimate, or click the "Work" tab (or choose Project>Show in Lower Table>Work Performed) to add events to track work actually performed.

TIP *Estimate events can be quickly converted into work events by selecting them and clicking the "Add Events to Work" button in the lower right-hand corner of the main iBiz window.*

TIP *By default, new job events are created with their rates set to ‘0.0’. If you want to change the default job event rate, open the custom job events window, click “Use global rate”, and enter the rate you want to use instead.*

Click the “Add Event” button at the bottom of the main window, then choose an event from the pop-up menu: “Untitled” will create a blank job event. The option to create a new job event group is also listed in the menu together with your custom job events. You can also create a new job event by choosing “Create New Job Event” from the Job Event menu or double-clicking in the blank space at the end of the job event list.

To remove a job event from the list, select it and click the “Delete” button at the bottom of the main window. A sheet will appear asking you to confirm that you want to permanently delete the job event. You can also delete events by pressing the delete key on your keyboard or choosing Job Event>Delete Job Event.

How do I edit job event status/information?

Each job event displays multiple status and information items directly in the job event list; at the top of the list you will find headings that describe what information is contained in each column.

The 'I' column with a check box on the left side of each job event line is for keeping track of whether or not the job event has been invoiced. A checkmark ☑ indicates that the job event has been invoiced; an empty box ☐ indicates that the job event has not been invoiced. For job events listed under the Estimate tab, the 'I' column indicates that the job event has been included on an estimate. Generating an invoice or estimate will automatically mark the included job events as invoiced by putting checks in the 'I' column.

TIP *If you select multiple job events, you can check or uncheck all of them at once. Use Command-click to select the events, then Control-click and choose "Toggle Mark as Invoiced" from the contextual menu that appears.*

Depending on your view settings, you may also see an 'NB' column with checkboxes. Job events with a check in this column have been designated as non-billable (click here for more information about non-billable events).

Most job event information can be edited directly in the job event list by double-clicking (or choosing Edit>Edit Job Event). The following columns can be edited this way:

- *Date:* indicates the date on which the work was performed (or is expected to be performed).
- *Job Event/Estimate:* indicates the name of the job event (if you are working under the Work tab) or estimate event (if you are working under the Estimate tab) and should be used to quickly remind you of the nature of the specific task completed/planned.
- *Time/Quantity/Mileage:* if a timed event is selected, this column displays the amount of time logged for the job event – this can either be entered manually on the project line or in the job event info drawer via "Change time," or incremented using a timer. If a quantity event is

selected, it shows the quantity of items to be billed. If a mileage event is selected, the column displays the number of miles to be billed.

- *Rate:* displays the cost per hour, expense per item, or flat fee, depending on the job event type selected.
- *Notes:* used to keep additional comments or information about the job event; these can also be viewed or edited using the info drawer.

In addition to the user-editable columns just described, each job event also displays an “Amount” column in the job events list that cannot be directly edited. This column displays the earnings generated from each job event, calculated using the job event’s time/quantity/mileage and rate as appropriate. If a job event’s earnings appears in orange it means that the earnings reflect a discount applied to the project.

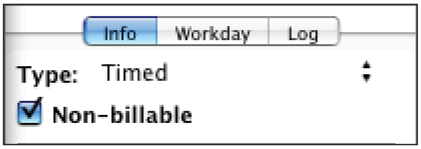
Some additional job event information is set using the info drawer. See job event types, non-billable status, rounding, taxes, and markup for more details.

Can I use job events to track work that I don’t want to invoice?

TIP *You can also choose to view a checkbox on the job event line to make an item non-billable. To enable the non-billable column, check ‘NB’ under View>Job Event Columns.*

Job events can be designated as “non-billable” items to indicate that they should not be included on invoices (or estimates) generated for that project. This can come in handy when you want to track expenses without passing them on to the client, or for logging extra time that is not meant to be billed.

To mark a job event as non-billable, select the job event, open the info drawer, and check “Non-billable.” Once a job event has been marked non-billable, its job event line will appear in gray.



Type: Timed

☑ Non-billable

Can I change the way I view my job events?

The job event list can be sorted by any of the column headings at the top of the list. Clicking a heading once will sort the projects according to the information in that column; clicking a second time will reverse the direction of the sort.

You can show or hide individual columns by checking and un-checking them in View>Job Event Columns. Columns can be resized by clicking and dragging the divider between two column headings. The order in which columns are displayed can be changed by clicking and dragging the column headings themselves.

NOTE *Job events are displayed only for the project selected in the project list. Selecting multiple projects will only display job events associated with the last project selected.*

How do I reorder job events, or move them between projects?

NOTE *Dragging and dropping a job event will cause any timer currently running on that job event to stop timing. Don't forget to start it again after you're done!*

Job events cannot be reordered via drag and drop; this is only for moving them in and out of job event groups. Instead, use sorting to change the order in which your events are displayed.

To move a job event from one project to another, you must use cut and paste. Select the job event(s) you want to move, choose Edit>Cut, and confirm that you want to delete the job event. Then select the project to which you want to add the job event and choose Edit>Paste.

What are the different types of job events?

There are five different types of job events. To change a job event's type, first select it in the job event list, then open the info drawer. Make sure the "Info" tab is selected, then click next to "Type" to select a job event type from the drop-down menu. You can also change a job event's type by Control-clicking it in the job event list and choosing from the "Change Type" submenu.

Here is a description of the five job event types:

- *Timed:* These are job events that use timers to track work performed and bill according to an hourly rate.
- *Flat rate:* These are job events that bill according to a flat fee, regardless of the amount of time spent. This type is also used to track one-time project expenses.

- *Quantity:* These are job events used to track object sales and bill on a cost-per-item basis.
- *Mileage:* These are job events used to track mileage and bill on a cost-per-mile basis.
- *Payment:* These job events are negative, and are subtracted from the total earnings. This is a convenient way to account for a deposit or other payment that a client makes toward a project, when you wish to have it displayed on an invoice or estimate.

NOTE *Payment events should only be used when the payment needs to be included on an invoice or estimate. Normally, all payments should be entered under the billing section.*

How do I use timers?

Timers let you log time spent working on a job event. You can use timed events to log billable hours, or simply track the time you put into a flat rate event (use a non-billable timed event for this purpose).

To time a job event:

1. Select the job event you would like to time. Its type must be set to "timed event."
2. Click the ⏱ "Toggle Timer" button at the bottom of the main iBiz window, or choose Job Event>Toggle Timer.
3. To stop timing, click the "Toggle Timer" button again.

NOTE *You can have as many job events running timers simultaneously as you like. If you would prefer to only run one timer at a time, check "Starting a timer stops all other timers" in iBiz Preferences.*

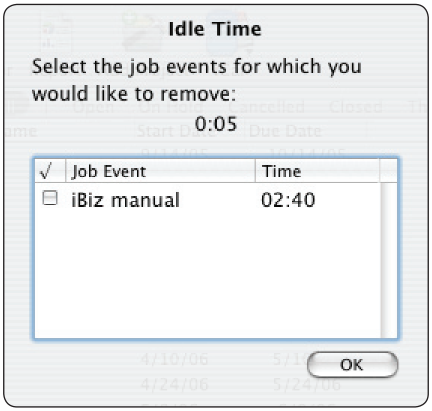
There are a number of ways iBiz reminds you that you have a timer running. When time is being logged, a small clock icon will appear next to the job event's time. The associated project will appear in **bold** in the project list, and a red badge will appear on the iBiz Dock icon displaying the number of currently running timers.

To round time logged on a job event:

1. Select the job event you would like to round. It must be a timed event and should have some time entered already.
2. Open the info drawer and make sure the "Info" tab is selected.
3. Click next to "Round Time" and select from the drop-down menu the nearest time to which you would like to round. When you make your selection, the selected job event's time will be rounded to that increment immediately.

TIP *You can also have your timers round automatically by checking "Automatically round time when timer is stopped" in iBiz Preferences. When you stop a timer, the time will be rounded to the increment specified in the job event info drawer.*

To discount idle time: Ever forget you have a timer running and take a break, only to return and find you logged two hours more than you actually worked? iBiz can check to see if the mouse has been moved in a specified period of time, notify you that you have been idle, and let you choose whether to subtract the extra time. To enable Idle Time, specify a time in iBiz Preferences under "Idle Time & Timer."



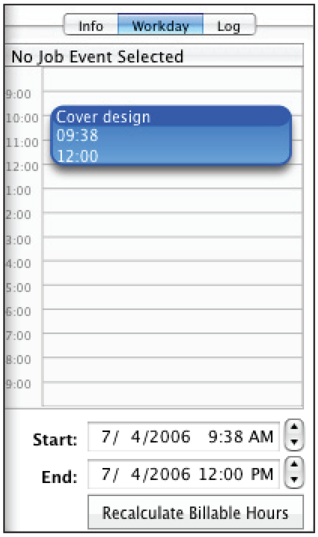
Idle Time

Select the job events for which you would like to remove:

0:05

✓	Job Event	Time
☐	iBiz manual	02:40

To view and edit time logged on a job event: Select the job event you wish to view and open the info drawer. There you will see two tabs: “Workday” and “Log.”



No Job Event Selected

Cover design
09:38
12:00

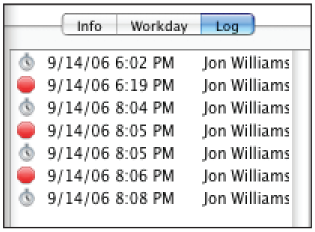
Start: 7/ 4/2006 9:38 AM

End: 7/ 4/2006 12:00 PM

The Workday tab displays a visual representation of all job events on the same day as the selected job event, showing each one as a block on a timeline. Clicking a job event block will display its start date/time and end date/time at the bottom of the info drawer. Clicking and dragging the block will change the job event’s start and end times; clicking and dragging the bottom of the block will change the job event’s end time.

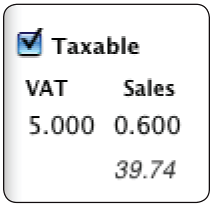
NOTE *Use the Workday to adjust your job event times visually, but make sure you click “Recalculate Billable Hours” to apply those changes to the job event. Please note that recalculating in this way does not account for previous starting and stopping of the timer – so any idle time between the hours listed will be counted.*

The Log tab displays a list of all the times you started and stopped timers for the selected job event.



```
◷ 9/14/06 6:02 PM   Jon Williams
● 9/14/06 6:19 PM   Jon Williams
◷ 9/14/06 8:04 PM   Jon Williams
● 9/14/06 8:05 PM   Jon Williams
◷ 9/14/06 8:05 PM   Jon Williams
● 9/14/06 8:06 PM   Jon Williams
◷ 9/14/06 8:08 PM   Jon Williams
```

How do I add taxes to job events?


☑ Taxable

VAT	Sales
5.000	0.600
	39.74

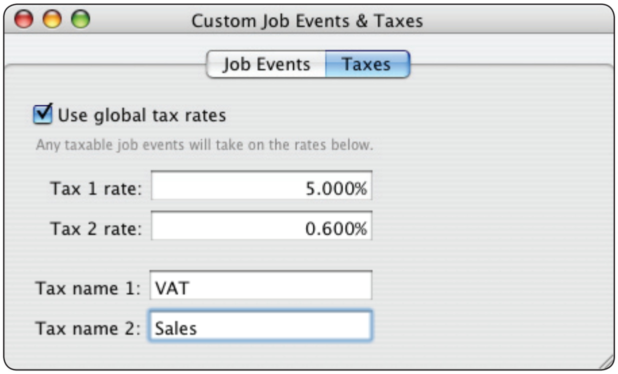
To apply taxes to a job event, select the job event, then open the info drawer. Check “Taxable” and type in the desired rate as a percent. Two separate tax rates can be applied to the same job event.

You can label the two tax rates in the Taxes window (underneath the global tax rate – see below) to help distinguish between them. Once specified, the labels will appear above the tax rates in the info drawer.

NOTE *Taxes can be calculated using several different methods. Choose iBiz>Preferences and click the “Advanced” button to choose whether or not job events should be summed before calculating taxes, and whether to compound the two taxes. Compounding will include the amount of Tax 1 when calculating the amount of Tax 2.*

Tax amounts are calculated and displayed in *italics* below the tax rates. Taxes are not added to the earnings displayed in the job event list immediately; they are added in only when an invoice (or estimate) is generated.

Global tax rates can be established in order to apply the same tax rate(s) to all new job events. To set global tax rates, click the Rates & Taxes button on the toolbar (if you don’t have this button, see How do I customize the toolbar?). Click the “Taxes” tab in the window that appears, then click “Global tax rates” and enter the appropriate rate(s) as a percent.



☑ Use global tax rates

Any taxable job events will take on the rates below.

Tax 1 rate: 5.000%

Tax 2 rate: 0.600%

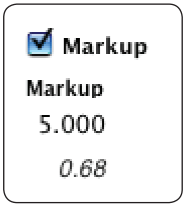
Tax name 1: VAT

Tax name 2: Sales

NOTE *Applying global tax rates will not affect tax rates on existing job events. Any new job event created will be marked taxable by default and applied the global rates. These can still be changed on an individual basis without affecting the global rates.*

How do I markup a job event?

To apply a markup rate to a job event, select the job event, then open the info drawer. Click “Markup” and type in the desired rate as a percent. The number shown in *italics* below the markup rate displays the total amount added to the job event’s earnings, which are automatically updated to include the markup amount.



☑ Markup

Markup

5.000

0.68

Can I group job events?

Job event groups can be created to help you better organize your job events. Think of groups as folders in which job events (sub-events in this case) can be kept.

You may, for example, want to organize all of your job events for a project according to the day on which the work was performed – so you create a job event group for each day. Or you may wish to group your job events according to the type of work performed, regardless of what day they were completed – so you create a job event group for each job event category.

To add a job event group to your job event list: Click the “Add Event” button at the bottom of the main iBiz window and choose “Job Event Group” from the pop-up menu, or choose Job Event>Add Job Event Group.

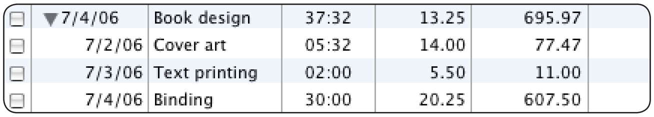
The status and information displayed for sub-events differs slightly from that of regular job events:

- *‘I’:* indicates whether or not the group’s sub-events have been invoiced. A checkmark ☑ indicates that all enclosed sub-events have been invoiced; a dash ⊟ indicates that some of them have been, and an empty box ☐ indicates that none of them have.
- *Date:* indicates the date on which the work was performed (or is expected to be performed). This can be edited by double-clicking.
- *Job Event/Estimate:* indicates the name of the group and should be used to quickly remind you which sub-events are enclosed. This can be edited by double-clicking.
- *Time:* this column displays the total time logged for enclosed sub-events. If the group contains quantity and/or mileage sub-events in addition to timed sub-events, the total quantity will be displayed in parentheses next to the total time.
- *Rate:* displays an average of the enclosed sub-events’ rates.
- *Amount:* displays the total earnings from enclosed sub-events.
- *Notes:* used to track additional comments or information about the job event group.

To add sub-events to a group:

TIP *You can also add existing job events to a group by dragging and dropping them onto the group in the job event list.*

1. Select the job event group.
2. Click the “Add Sub-Event” button at the bottom of the main iBiz window.
3. Choose “Untitled” from the pop-up menu to add a blank sub-event, or choose one of your custom job events.
4. To view the sub-event, click the small triangle to the left of the group to display all its enclosed sub-events:



☐	▼7/4/06	Book design	37:32	13.25	695.97
☐	7/2/06	Cover art	05:32	14.00	77.47
☐	7/3/06	Text printing	02:00	5.50	11.00
☐	7/4/06	Binding	30:00	20.25	607.50

5. Edit the sub-event and use it the same as you would any other job event.

To delete a job event group: Select the group and click the “Delete” button at the bottom of the main iBiz window. A sheet will appear asking you to confirm that you want to permanently delete the group. All enclosed sub-events will be deleted together with the job event group.

Invoicing job event groups: Job event groups can also be used to control how your job events are displayed on invoices and estimates. If a group is expanded (all enclosed sub-events are visible) in the job event list when you generate an invoice or estimate, each sub-event will be detailed underneath the job event group on the invoice or estimate. If the group is condensed (only the group itself is visible) in the job event list, the invoice or estimate will display summary information for the job event group only.

What are custom job events?

Custom job events allow you to store job events that you use frequently, so that you can quickly create job events with the same settings. For example, window cleaning may be a service that you perform frequently, and it always bills at the same rate with the same taxes applied. By creating a custom job event called “Window cleaning,” you can easily add this event to any project without having to re-type the name, rate, and tax information every time.

To create a custom job event:

TIP *You can easily create a custom job event based on an existing job event by selecting it and choosing Job Events>Create Custom Job Event from Selection.*

Click the Rates & Taxes button on the toolbar (if you don’t have this button, see How do I customize the toolbar?) to bring up the custom job event window.

You can also access this window by clicking “Add Event” at the bottom of the main iBiz window and choosing “Edit” from the pop-up menu, or by choosing Job Event>Show Custom Job Events.

In the custom job event window, click the + button to add a blank custom job event to the list. Enter a name, type, rate, and any other information you want to associate with the job event.

To add a job event to a project based on your custom job event: Click “Add Event” at the bottom of the main iBiz window and select the custom job event from the pop-up menu. The order in which your events are displayed reflects their order in the custom job events window. You can change the order in which they display by clicking and dragging each one to the appropriate location.

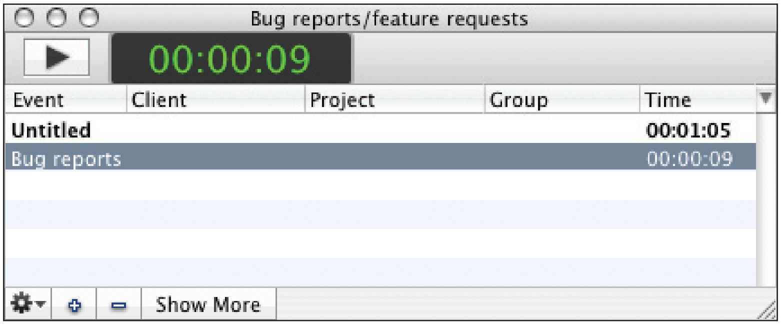
TIP *Creating a custom job event from a job event group will store all enclosed sub-events as well. This allows you to add an entire set of job events to a project with one click, which can come in handy when your projects require the same set of tasks to be performed each time.*

To remove a custom job event: Select it in the custom job event window and click the − button.

How do I use quick timer events and/or the menu bar timer?

Quick timer events let you very quickly start a timer. All quick timer events are “unfiled” – that is, they are not associated with any project or client. Quick timer events can be accessed from a floating window or the menu bar timer.

To use the floating window: Click the Quick Events button on the toolbar (if you don’t have one, see How do I customize the toolbar?), or choose Job Event>Show Quick Timer Events. The floating window that appears will stay visible regardless of what application you are using:



Bug reports/feature requests

00:00:09

Event	Client	Project	Group	Time
Untitled				00:01:05
Bug reports				00:00:09

- To create a new quick timer event, click the ⊕ button, or click the ⚙▾ button and choose one of your custom job events.
- To start a timer for the selected event, click the ▶ Play button at the top left of the floating window; clicking this button again will stop the timer. Events that are currently timing will appear in **bold**.

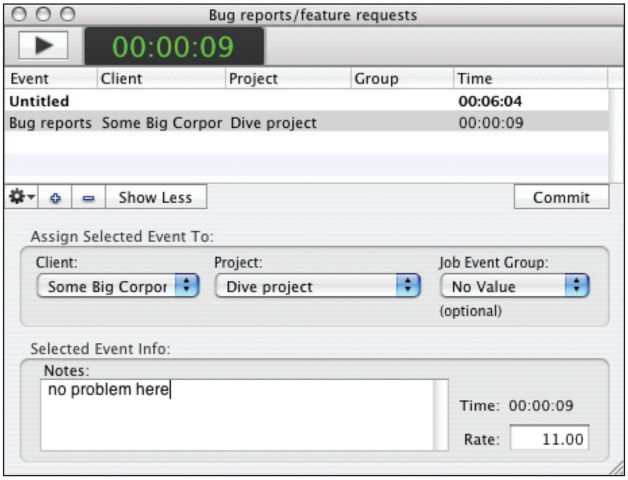
TIP Show and hide columns in the floating window to display only the information you need. Click the ▼ button to the right of the column headings and choose a column to toggle its visibility.

You can time as many quick events simultaneously as you wish. Select a quick timer event from the list to show its current time in the large display at the top of the floating window. An event's name or time can be edited by double-clicking it. To remove a quick timer event, select it and click the ⊖ button in the floating window.

Once you are done timing a quick event, assign it to an existing project:

1. Select the quick event and click the Show More button, then choose a client, project, and job event group (if desired) from the corresponding pop-up menu buttons.

2. Once these have been chosen, click the Commit button to add the quick event to the designated project and remove it from the quick events list. Click the Show Less button to return the floating window to its previous state.



Bug reports/feature requests

00:00:09

Event	Client	Project	Group	Time
Untitled				**00:06:04**
Bug reports	Some Big Corpor	Dive project		00:00:09

Assign Selected Event To:

Client: Some Big Corpor
Project: Dive project
Job Event Group: No Value
(optional)

Selected Event Info:

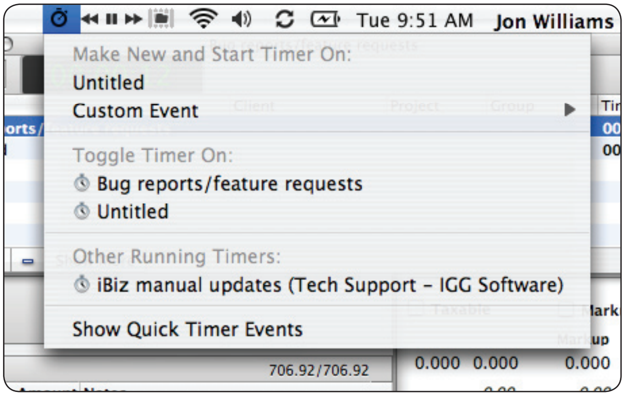
Notes: no problem here
Time: 00:00:09
Rate: 11.00

You can also drag & drop a quick timer event from the floating window onto a project to assign it to that project.

To use the menu bar timer: Check “Show iBiz status in top menu bar” in iBiz>Preferences. A small stopwatch icon will appear at the top of your screen towards the right side of the menu bar. If any timers are currently logging time (regardless of whether they are quick timers or regular job event timers), the menu bar timer will appear in black ⏱; if no event is being timed, the menu bar timer will appear in a lighter shade of gray ⏱.

Click the menu bar timer to drop down a menu of options for your timers:

NOTE *You can also use the menu bar timer to view any timers that are currently logging time in the main iBiz window (these are listed under "Other Running Timers"). You can stop these timers from the menu, but once stopped they will no longer appear in the list.*


Tue 9:51 AM
Jon Williams
Make New and Start Timer On:
Untitled
Custom Event
Toggle Timer On:
Bug reports/feature requests
Untitled
Other Running Timers:
iBiz manual updates (Tech Support – IGG Software)
Show Quick Timer Events
706.92/706.92
0.000 0.000 0.000

- To create a new quick timer event and start running its timer, choose either "Untitled" or one of your custom job events from the list. The event will be added to the floating window and can be toggled under the menu bar timer.
- To toggle an existing quick timer event, select it from the list. A small clock icon displayed next to an event indicates that its timer is running.
- To view the floating window, choose "Show Quick Timer Events."

How do I post individual job events to iCal?

If you prefer not to synchronize an entire project with iCal, you can still post individual job events to an iCal calendar. First you need to enable the iCal toolbar button – if you don't know how to do this, see How do I customize the toolbar?.

To send job events to iCal: First, select the enclosing project, open the info drawer, and choose a calendar from the drop-down list ("Synchronize with iCal" does not need to be checked). Select one or more job events (using Command-click), then click the iCal toolbar button. Choose "Make iCal

Event” from the drop-down menu. The selected job event(s) will be posted to the selected iCal calendar at their specified dates and times.

To import events from iCal: Choose Project>Sync with iCal>Reset Events and click “OK.” Any events in the selected iCal calendar that are within the current project’s date range will be imported as job events. Your existing job events will not be overwritten, but duplicates may be created if your existing job events already appear in iCal.

What is the Document Monitor?

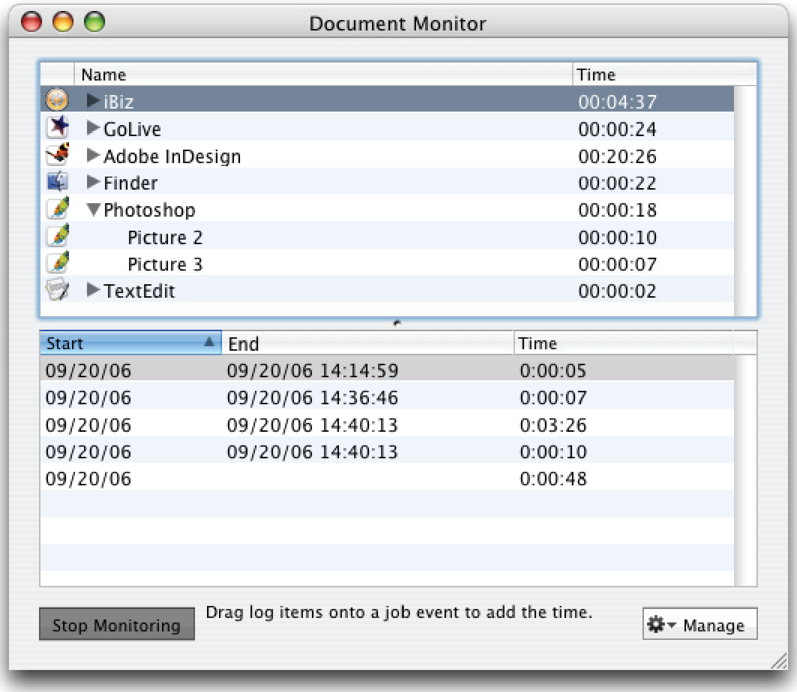
The Document Monitor is a brand new addition to iBiz! It is designed to help you track the time you spend using different applications on your computer, then quickly transfer the time logged to existing job events. A project manager, for instance, may use the Document Monitor to measure how much time she spends using Photoshop, Mail, and iBank, then assign the time logged to job events named “Marketing,” “Communications,” and “Budgeting,” respectively.

To monitor your activity: Choose File>Show Document Monitor, or click the Doc. Monitor button on the toolbar (if you don’t have a Doc. Monitor button, see How do I customize the toolbar?).

NOTE *Document Monitor requires Universal Access to be enabled on your computer. Make sure “Enable access for assistive devices” is checked under the Unversal Access pane in System Preferences.*

Click the Start Monitoring button to begin tracking your activity. iBiz will display a blinking magic wand on its icon in the Dock while monitoring.

Each time you switch to another application, it is added to the list in the top half of the Document Monitor window. Time is logged only for the window which is currently active; other windows open in the background will not log time until they are switched to the foreground. The total time logged for each application is listed next to its name in the application list. Clicking the small triangle next to an application will reveal each window that was viewed and the time spent with each one.



Name	Time
▶ iBiz	00:04:37
▶ GoLive	00:00:24
▶ Adobe InDesign	00:20:26
▶ Finder	00:00:22
▼ Photoshop	00:00:18
Picture 2	00:00:10
Picture 3	00:00:07
▶ TextEdit	00:00:02

Start	End	Time
09/20/06	09/20/06 14:14:59	0:00:05
09/20/06	09/20/06 14:36:46	0:00:07
09/20/06	09/20/06 14:40:13	0:03:26
09/20/06	09/20/06 14:40:13	0:00:10
09/20/06		0:00:48

Drag log items onto a job event to add the time.

The Document Monitor keeps a log for each window you view containing the start time, end time, and duration of viewing. Each time you switch from one window to another, one log entry is closed and another is created. Logs are displayed in the bottom half of the Document Monitor window.

Selecting an application or window from the list in the top half of the Document Monitor will allow you to view the log for that application/ window. You can clear logs for the selected item, or all logs, by clicking the ⚙▾ Manage button and choosing the appropriate item from the drop-down menu. Pressing ‘Delete’ on your keyboard will also delete the selected item(s).

When you are done, click Stop Monitoring to finish tracking your activity.

To assign logged time to your job events: Drag and drop items onto your job events to add the time logged. You can drag an application or window from the top half of the Document Monitor, or you can use specific log items from the bottom half. Command-clicking will allow you to select multiple items. Click and drag the selected items from the Document Monitor onto the appropriate job event in the main iBiz window (the job event must be a timed event). Time from the items selected in the Document Monitor will be added to the job event’s existing time.

Chapter 6: Invoices & Estimates

What are invoices and estimates all about?

After performing work on your projects, you can use iBiz to generate and send invoices to your clients. Invoices outline the work performed, earnings, taxes, discounts, and any other information you wish to include about the projects when requesting payment.

Estimates allow you to outline work to be performed on projects with their associated expenses prior to the project's inception. Estimates can be generated and sent to clients in the same fashion as invoices.

How do I create an invoice or estimate?

To generate an invoice:

First, select one or more client(s) and project(s) to be invoiced (multiple clients/projects can be selected using Command-click). Click the Work tab (job events should have been entered already). Go to Invoice>Create Invoice and choose a template, or click the Invoice button below the project list and choose a template from the drop-down menu.

All job events listed under the Work tab for the selected project(s) that are not marked invoiced already, and are not marked non-billable, will be included on the new invoice.

To generate an estimate:

As with invoices, first select one or more client(s) and project(s) for which the estimate is to be generated. Click the Estimate tab (job events should have been entered already). Go to Invoice>Create Estimate and choose a template, or click the Estimate button below the project list and choose a template from the drop-down menu. All job events listed under the Estimate tab for the selected project(s) that are not marked invoiced or non-billable will be included on the new estimate.

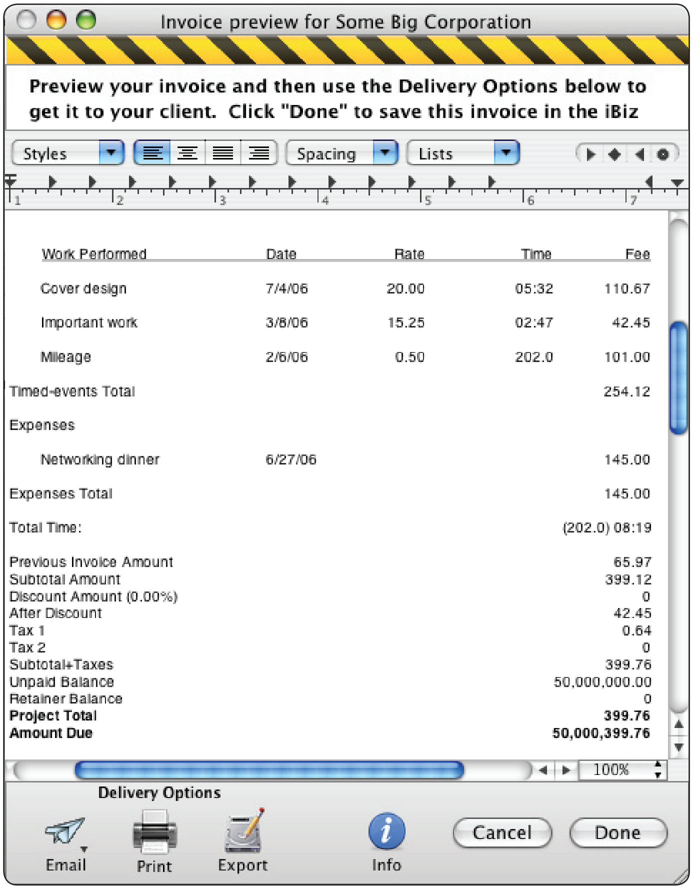
To specify a date range:

If you want to generate an invoice or estimate for job events in a specified date range only, click the Work or Estimate tab, then choose Invoice>More Invoice Options. Select “Job Events in Selected Projects,” then enter a start and end date and select one or more projects from the project list. Select an invoice template from the drop-down menu, and click “Generate Invoice.” All job events in the selected projects that fall within the specified date range, are billable, and have not already been invoiced will be used to create the new invoice/estimate.

To preview your invoice/estimate:

After telling iBiz to generate your invoice or estimate using one of the two methods just described, a window will appear showing a preview of your invoice/estimate. The yellow and black stripes appearing across the top of the window are there to remind you that the invoice/estimate has not yet been saved to the billing section.

If you need to make any manual changes to the invoice/estimate, you can make them directly in the preview window (RTF templates ony). You can view additional information about the invoice/estimate by clicking the i button at the bottom of the window.



Preview your invoice and then use the Delivery Options below to get it to your client. Click "Done" to save this invoice in the iBiz

Work Performed	Date	Rate	Time	Fee
Cover design	7/4/06	20.00	05:32	110.67
Important work	3/8/06	15.25	02:47	42.45
Mileage	2/6/06	0.50	202.0	101.00
Timed-events Total				254.12
Expenses				
Networking dinner	6/27/06			145.00
Expenses Total				145.00
Total Time:				(202.0) 08:19
Previous Invoice Amount				65.97
Subtotal Amount				399.12
Discount Amount (0.00%)				0
After Discount				42.45
Tax 1				0.64
Tax 2				0
Subtotal+Taxes				399.76
Unpaid Balance				50,000,000.00
Retainer Balance				0
Project Total				**399.76**
Amount Due				**50,000,399.76**

TIP *Save some time between estimates and invoices! Estimate events can be quickly transferred to the project's Work tab by selecting them and clicking "Add Events to Work" at the bottom-right of the Estimate panel.*

To send your invoice/estimate to the client:

The preview window contains several options for delivering the invoice/estimate to the client:

Email: Click this button to generate a new message in Apple Mail addressed to the client. Choose "PDF Attachment Using Mail" to attach your invoice/estimate as a PDF document, or choose "Text Using Mail" to copy the text of your invoice/estimate directly into the message body.

Print: Click this button to print a copy of the invoice/estimate or save it to a PDF document.

Export: Click this button to save a copy of your invoice/estimate to your hard drive. If the invoice/estimate uses an RTF template, it will save as an RTF file; if it uses an HTML template, it will save as a Safari Web archive file.

To save your invoice/estimate to the billing section: click the "Done" button at the bottom of the preview window. To discard the invoice/estimate without saving, click "Cancel."

How do I change basic invoice/estimate settings?

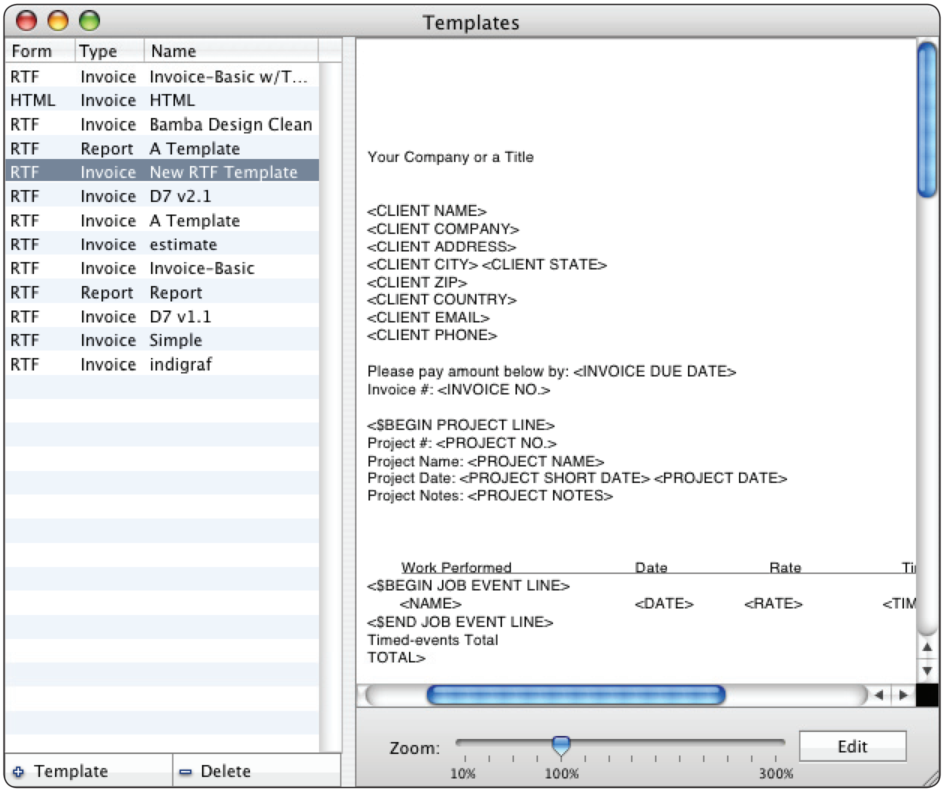
To set the number to be assigned to the next invoice/estimate generated, choose iBiz>Preferences and click "Advanced." Enter the number where it says "Next Invoice Number." The next invoice or estimate you generate will display this number, and each subsequent one will increment accordingly.

To set a default time period for invoice due dates, again choose iBiz>Preferences and click "Advanced." Enter the number of days where it says "Invoices are due after." Every invoice generated from that point forward will automatically be assigned a due date equal to the current date plus the number you entered.

How do I customize my invoices, estimates, or reports?

Invoices, estimates, and reports are generated using your installed templates. To edit these, open the templates window by choosing Invoice>Show Invoice

Templates, or by clicking the Invoice/Estimate button below the project list and choosing “Show Templates” from the drop-down menu.



Form	Type	Name
RTF	Invoice	Invoice-Basic w/T…
HTML	Invoice	HTML
RTF	Invoice	Bamba Design Clean
RTF	Report	A Template
RTF	Invoice	New RTF Template
RTF	Invoice	D7 v2.1
RTF	Invoice	A Template
RTF	Invoice	estimate
RTF	Invoice	Invoice-Basic
RTF	Report	Report
RTF	Invoice	D7 v1.1
RTF	Invoice	Simple
RTF	Invoice	indigraf

Your Company or a Title

<CLIENT NAME>
<CLIENT COMPANY>
<CLIENT ADDRESS>
<CLIENT CITY> <CLIENT STATE>
<CLIENT ZIP>
<CLIENT COUNTRY>
<CLIENT EMAIL>
<CLIENT PHONE>

Please pay amount below by: <INVOICE DUE DATE>
Invoice #: <INVOICE NO.>

<$BEGIN PROJECT LINE>
Project #: <PROJECT NO.>
Project Name: <PROJECT NAME>
Project Date: <PROJECT SHORT DATE> <PROJECT DATE>
Project Notes: <PROJECT NOTES>

Work Performed Date Rate Ti
<$BEGIN JOB EVENT LINE>
<NAME> <DATE> <RATE> <TIM
<$END JOB EVENT LINE>
Timed-events Total
TOTAL>

Your templates are listed along the left side of the template window, each one with its format (RTF or HTML), type (Invoice or Report), and name. Clicking a template will display a preview of that template to the right, which you can zoom in or out using the “Zoom” slider at the bottom right side of the template window.

NOTE *HTML templates are only available for invoices and estimates, not reports.*

To add a new template:

- Click the ⊕ Template button at the bottom left corner of the templates window. A sheet will appear with several options for the new template.
- Enter a name for the template, choose whether it is an invoice/estimate or report template, and choose whether you want to use Rich Text or HTML format.
- Click "OK" to add the new template to your list.

To delete a template:

Select the template and click the ⊖ Delete button at the bottom of the templates window. A sheet will appear asking you to confirm that you want to permanently delete the template.

To edit a template:

Double-click a template, or select a template and click the "Edit" button in the bottom right corner of the template window to open the template in edit mode. Yellow and black stripes will appear at the top of the pane to remind you that you are currently editing the template. You can change the name of the template at the top of the edit pane. If it is an RTF template, the editor displays the text of the template; if it is HTML, you will see the HTML code.

The template itself can be edited directly in the template window while in edit mode, or you can use copy/paste to edit the template using an RTF or HTML editor outside of iBiz. For more information on template editing, please consult the iBiz Template Manual, available on our website at the following address: http://www.iggsoftware.com/ibiz/downloads.php#manuals

TIP *Your template files are stored in the following location: ~/Library/Application Support/IGG Software/iBiz/Templates/. Easy access makes for easy editing – any changes you make to these files using outside applications will be automatically reflected in iBiz.*

To save changes made to the template, click the “Commit Changes” button at the bottom right of the template window, or click “Cancel Editing” to discard the changes.

Where can I find additional invoice/estimate or report templates?

Additional templates for invoices and estimates are available for download on our website at: http://www.iggsoftware.com/ibiz/downloads.php#templates

To install a downloaded template, place it in the following folder on your hard drive: ~/Library/Application Support/IGG Software/iBiz/Templates/ (the ‘~’ denotes your user folder).

If you would like to share your template design with other iBiz users, please send an email to info@iggsoftware.com with the template attached in RTF or HTML format, and we will consider posting it on our website!

What is this tag for and how do I use it?

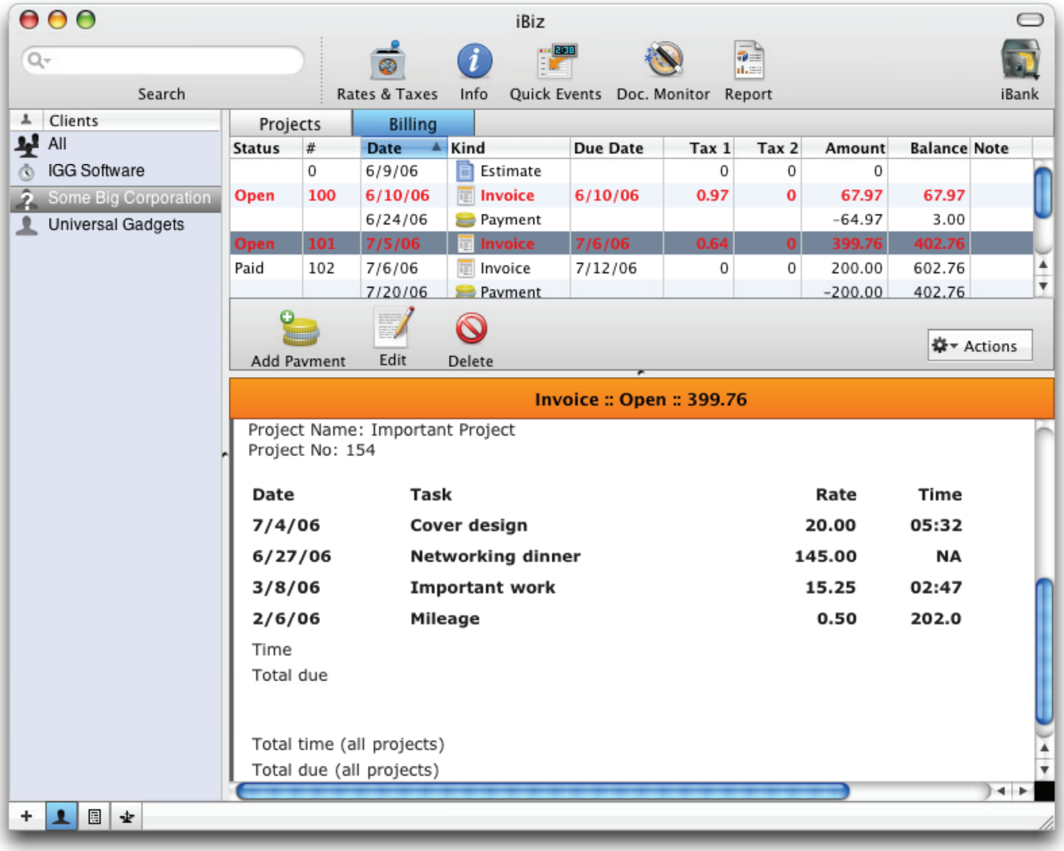
For a complete reference on template editing and comprehensive tag dictionary, please download the iBiz 3 Template Guide from our website at: http://www.iggsoftware.com/ibiz/downloads.php#manuals

Chapter 7: Billing

What is the billing section all about?

The billing section, new to iBiz 3, is a convenient way to manage all of your clients' billing activity. To view this section, first select the client(s) for whom you wish to view billing information, then click the "Billing" tab in the main iBiz window, or choose View>Show Billing Activities.

When the Billing tab is selected, the top half of the main iBiz window displays a billing history consisting of all invoices, estimates, and payments associated with the selected client(s). The bottom half of the window displays the original text of the invoice or estimate currently selected in the billing list.


iBiz
Search
Rates & Taxes
Info
Quick Events
Doc. Monitor
Report
iBank
Clients
All
IGG Software
Some Big Corporation
Universal Gadgets
Projects
Billing
Add Payment
Edit
Delete
Actions

Status	#	Date	Kind	Due Date	Tax 1	Tax 2	Amount	Balance	Note
	0	6/9/06	Estimate		0	0	0		
Open	100	6/10/06	Invoice	6/10/06	0.97	0	67.97	67.97	
		6/24/06	Payment				-64.97	3.00	
Open	101	7/5/06	Invoice	7/6/06	0.64	0	399.76	402.76	
Paid	102	7/6/06	Invoice	7/12/06	0	0	200.00	602.76	
		7/20/06	Payment				-200.00	402.76	

Invoice :: Open :: 399.76

Project Name: Important Project
Project No: 154

Date	Task	Rate	Time
7/4/06	Cover design	20.00	05:32
6/27/06	Networking dinner	145.00	NA
3/8/06	Important work	15.25	02:47
2/6/06	Mileage	0.50	202.0

Time
Total due

Total time (all projects)
Total due (all projects)

About billing in iBiz 3

iBiz 3 brings some rather significant changes to the way billing and payments are handled when compared to iBiz 2. To allow for deposits, partial payments, and other flexible payment options, payments are now tracked independently of projects and invoices. All billing is managed on a per-client basis (as opposed to a per-project basis, as it was in iBiz 2).

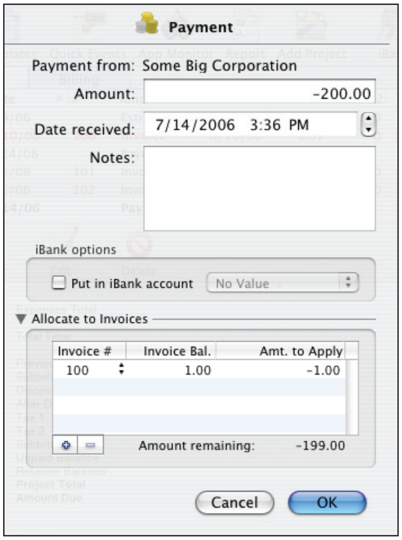
Each time you generate an invoice, the invoiced amount is added to the client's balance. In iBiz 2, all you had to do after receiving payment was marked the invoice as "Paid," and the balance would adjust automatically. In iBiz 3, you still need to mark the invoice as "Paid," but doing so does not affect the client's balance. To adjust the balance, make sure you also add a payment item to the billing section for the amount received. Tracking payments in this way will ensure that the client's balance is appropriately maintained. Keep reading for more information about this process.

How do I add or delete invoices, estimates, or payments?

NOTE *If you upgraded from iBiz 2, all of your invoices and estimates will be automatically added to the billing section.*

Invoices and estimates are added to the billing section automatically after they have been generated and saved. Please refer to How do I create an invoice or estimate? for more details.

To add a payment to the billing list: First make sure you have the correct client selected in the client list, then click the "Payment" button at the bottom of the billing list. A sheet will appear asking you to enter the amount paid and the date on which payment was received.



Payment from: Some Big Corporation

Amount: -200.00

Date received: 7/14/2006 3:36 PM

Notes:

iBank options

☐ Put in iBank account: No Value

▼ Allocate to Invoices

Invoice #	Invoice Bal.	Amt. to Apply
100	1.00	-1.00

Amount remaining: -199.00

To send payments to iBank: If you use iBank to manage your finances, you can have iBiz automatically create a transaction from a payment. Make sure iBank is open when you add a new payment in iBiz, then click “Put in iBank account” in the payment sheet and choose an account from the drop-down menu. The payment will be added to iBank as a deposit transaction with the associated client listed as the payee.

To allocate payments to individual invoices: Click the triangle next to “Allocate to Invoices.” Click the ⊕ button to add an invoice to the list, and choose the invoice number from the drop-down menu under “Invoice #” (only open invoices will appear in this list). The unpaid balance for the selected invoice will be displayed under “Invoice Bal.” Type in the amount to allocate towards the invoice (as a negative number) under “Amt. to Apply.”

Add additional invoices to the allocation list as necessary, or remove them using the ⊖ button. The remaining balance of the payment is displayed at the bottom-right of the payment sheet. You cannot allocate more money than the payment is worth, but you do not have to allocate the entire amount of the payment. Any payment containing unallocated funds will appear in **bold** in the billing list.

NOTE *Allocating funds equal to the total outstanding balance on an invoice will automatically mark the invoice as Paid. You cannot allocated more funds to an invoice than the amount of its outstanding balance.*

To delete an item from the billing list: Select the item and click the 🚫 “Delete” button. A sheet will appear asking you to confirm that you want to delete the item permanently. Deleting an invoice or estimate will automatically mark associated job events as not invoiced (they will no longer display a check in the ‘I’ column).

How do I edit billing item status/information?

The billing list displays several columns with information about each item:

- *Status:* only applies to invoices; indicates whether the invoice is Paid (payment has been received in full) or Open (payment is pending).
- *Date:* the date on which the invoice or estimate was generated, or the payment was received.
- *Number:* the invoice or estimate number (to make a change in the automatic numbering, see How do I change basic invoice/estimate settings?)
- *Kind:* indicates whether the item is an invoice, estimate, or payment.
- *Due Date:* the project’s due date at the time the invoice or estimate was generated. Overdue items appear in red in the billing list.
- *Tax 1:* the amount of tax 1 added to the earnings or estimate.
- *Tax 2:* the amount of tax 2 added to the earnings or estimate.
- *Amount:* the total value of the invoice earnings, estimate, or payment (including any applicable taxes).
- *Balance:* a running total of all earnings minus payments for the selected client(s). Estimates do not affect the balance calculations.
- *Notes:* additional comments or information about the billing item.

A billing item's balance cannot be edited directly. To edit any of the other information for a specific item, select the item and click the "Edit" button at the bottom of the billing list. Enter any changes into the sheet that appears, and click "OK" to save the changes or "Cancel" to discard them.

NOTE *You can view any payments allocated to an invoice by selecting the invoice in the billing list, clicking the "Edit" button, and choosing the "Payments" tab. To dissociate a payment from an invoice, select it and click − to remove it.*

Once an invoice or estimate has been generated and saved to the billing list, its content cannot be changed. Editing an invoice or estimate in the billing list will only change how its line item appears in the billing list and is calculated in the balance. To make changes directly to an invoice or estimate, you must generate a new invoice or estimate and make the appropriate changes before saving it to the billing list.

Can I change the way I view my billing items?

The billing list can be sorted by any of the column headings at the top of the list. Clicking a heading once will sort the items according to the information in that column; clicking a second time will reverse the direction of the sort.

NOTE *Billing items are displayed only for the clients selected in the client list. Selecting multiple clients (by Command-clicking) will all display billing items associated with those clients.*

Columns can be resized by clicking and dragging the divider between two column headings. The order in which columns are displayed can be changed by clicking and dragging the column headings themselves.

How do I reissue invoices or estimates?

To resend an invoice or estimate that has already been saved to the billing section, select it and click the “Actions” button at the bottom of the billing list. Choose “Print” from the drop-down menu to print out a copy of the invoice/estimate, or choose one of the options under “Send Again” to email a copy of the invoice/estimate.

How do I export invoices and estimates to XML?

To export the information from a saved invoice or estimate as XML data, select the invoice/estimate in the billing section and click the “Actions” button at the bottom of the billing list. Choose “Export as XML” from the drop-down menu, then choose a location to save the XML file.

Chapter 8: Reports

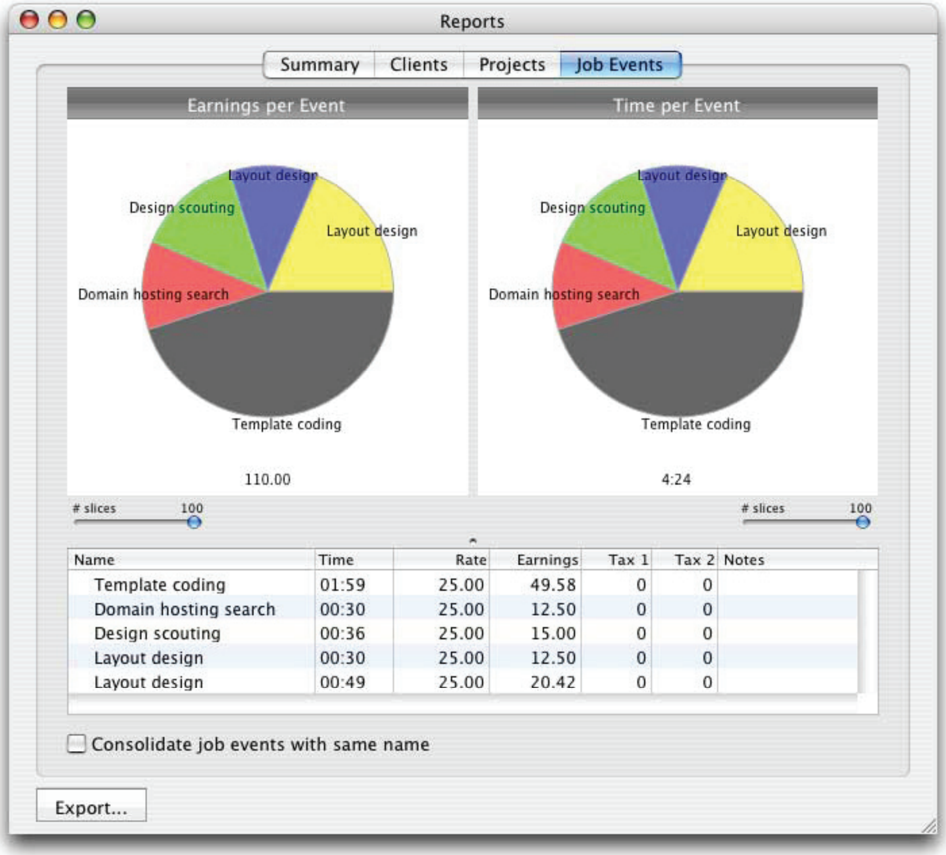
What are reports all about?

Reports allow you to quickly summarize information about your clients, projects, and job events. You can compare project earnings, see how your time is distributed among job events, or prepare statements for your accountant – even organize your records for tax time! Reports in iBiz are generated directly from the client list and can be exported in various formats.

How do I generate a report?

In the main iBiz window, select the client or clients (using Command-click) about whom you want to generate a report, then choose Client>Make Report or click the Report button on the toolbar (if you don't have a Report button, see How do I customize the toolbar?).

A sheet will appear displaying each of the selected clients and their associated projects. Check individual projects to mark them for inclusion in the report. Checking a client will mark all its associated projects; clicking "Check/Uncheck All" will mark all displayed clients and projects. To report on job events that fall within a specific range of dates only, check "Only report on job events between" and enter a start and end date. Click "Generate Report" when you are finished.


Reports
Summary
Clients
Projects
Job Events
Earnings per Event
Layout design
Design scouting
Layout design
Domain hosting search
Template coding
110.00
Time per Event
Layout design
Design scouting
Layout design
Domain hosting search
Template coding
4:24
# slices
100
# slices
100
Export...

Name	Time	Rate	Earnings	Tax 1	Tax 2	Notes
Template coding	01:59	25.00	49.58	0	0	
Domain hosting search	00:30	25.00	12.50	0	0	
Design scouting	00:36	25.00	15.00	0	0	
Layout design	00:30	25.00	12.50	0	0	
Layout design	00:49	25.00	20.42	0	0	

☐ Consolidate job events with same name

The report window that appears contains four tabs:

- *Summary:* This tab displays textual reports generated from your installed templates. Choose a template from the "Template" menu, and the report will update accordingly. See How do I customize my invoices, estimates, or reports? for more information about templates.
- *Clients:* This tab displays pie charts of earnings per client and time per client, with total earnings and total time shown beneath their

respective charts. Under the charts is a table summarizing project information for each client included in the report.

- *Projects:* This tab displays pie charts of earnings per project and time per project, with total earnings and total time shown beneath their respective charts. Under the charts is a table summarizing project information for each project included in the report.
- *Job Events:* This tab displays pie charts of earnings per job event and time per job event, with total earnings and total time shown beneath their respective charts. Sliders on each chart allow you to set the maximum number of unique job events displayed; any remaining events will be merged into a slice marked "Other." Under the charts is a table summarizing job event information for each project included in the report. By default, each job event is listed (and charted) individually. To group similar job events together, check "Consolidate job events with the same name."

How do I save reports?

Regardless of which report you are currently viewing, clicking the "Export" button in the bottom-left corner of the window will give you two options: "Export summary data as text" will allow you to save the report under the Summary tab to a text file. "Export data from tables" will allow you to save the data from the client, project, and/or job event tables to a tab-delimited text file. Choose a name and location for the new file and click "Save."

In addition, clicking "Save as PDF" under the Summary tab will allow you to save the textual report to PDF format.

Chapter 9: Networking

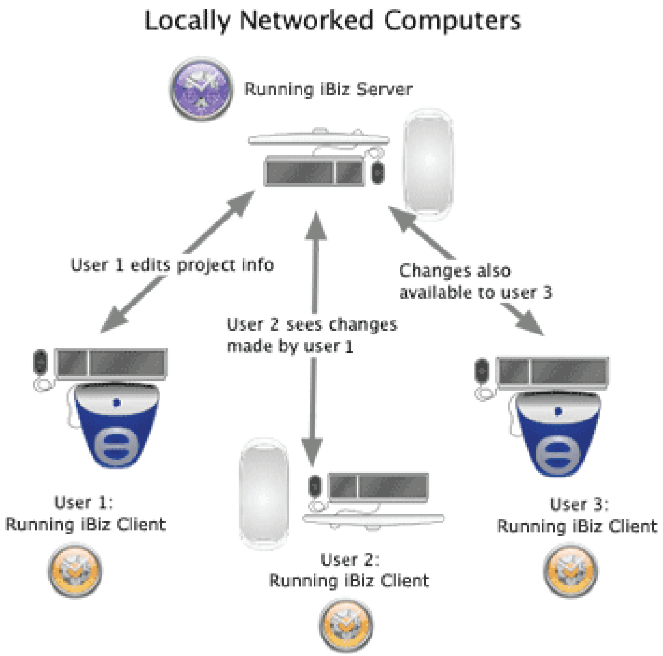
(iBiz Server/Client)

What is networking iBiz all about?

iBiz networking allows you to share your iBiz data over a local network or [IP connection]() so that multiple users can view and edit the same [clients](), [projects](), and [job events](). iBiz Server acts as a “middle-man” to allow users running iBiz Client on other computers, connected through a network, to access project information stored on the computer running iBiz Server.

Rather than having one person track all the work your office performs, each employee can enter his or her own time individually on an iBiz network. Several tools are also included to facilitate greater collaboration on projects.

Networking requires that you purchase the iBiz Server/Client package. Visit our online order page for more details:
https://secure.iggsoftware.com/store/


Locally Networked Computers
Running iBiz Server
User 1 edits project info
User 2 sees changes made by user 1
Changes also available to user 3
User 1: Running iBiz Client
User 2: Running iBiz Client
User 3: Running iBiz Client

How many users can share an iBiz network?

There is no established limit to the number of users that can share data over an iBiz network.

How do I set up an iBiz network? (iBiz Server/Client only)

Install iBiz Server on the computer from which you wish to administer the server, and install a copy of iBiz Client on the computer of each user you want to have access to the iBiz network. *If you have a firewall installed on the server computer, you will need to open ports 5345 through 5351.*

Be sure to keep the iBiz Server application open whenever you want the iBiz network to be accessible, as iBiz Client users can only access the server when it is running.

To import your old projects: If you are upgrading from iBiz 2.x (stand-alone version) or iBiz Server 2.x, all of your client and project data will be imported by the Setup Assistant the first time you run iBiz Server 3. If you are upgrading from iBiz 1.4.x, iBiz Server will ask if you want to import old iBiz projects. Before choosing yes, please read the document titled "Attn-Upgrading Users" that explains how to ensure a smooth upgrade.

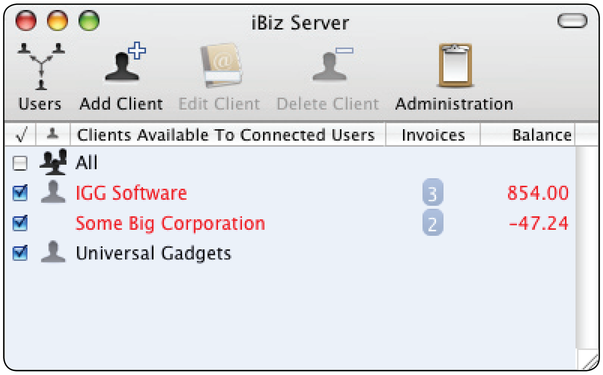
NOTE *Project and job event information can only be added or changed via iBiz Client. If you want to be able to make these changes from the computer running iBiz Server, be sure to install a copy of iBiz Client on that computer as well.*

How do I see who is currently connected to the server? (iBiz Server only)

To view a list of connected users, make sure the iBiz Server window is open (choose Window>iBiz Server), then choose Server>Connected Users, or click the Users button on the toolbar (if you don't have a Users button, see How do I customize the toolbar?). A drawer will appear to the left or right side of the window, depending on where there is more space available, displaying the names of all iBiz Client users with an active connection to iBiz Server.

How do I manage clients in iBiz Server? (iBiz Server only)

Clients are managed in iBiz Server much the same way as in the stand-alone version of iBiz. When you open iBiz Server, you should be presented with a window showing your client list (if you do not see this window, choose "Window>iBiz Server").



√	Clients Available To Connected Users	Invoices	Balance
☐	All		
☑	IGG Software	3	854.00
☑	Some Big Corporation	2	-47.24
☑	Universal Gadgets		

To add, edit, and delete clients: Use the corresponding buttons on the toolbar (if you don't have these buttons, see How do I customize the toolbar?). For more detailed information about adding/editing/deleting clients, please refer to the Clients section of this manual.

To share clients over the network: Click the checkbox next to a client displayed in the list to determine whether or not it can be accessed by connected users. Checked ☑ items are available for iBiz Client users for viewing, editing, and project creation; unchecked ☐ items are not. The "All" client can be shared or hidden from users in the same manner.

To change how clients are displayed: Choose iBiz Server>Preferences. Under the Client pane, you can choose how clients are displayed in iBiz Server. This setting will not affect how connected users view their clients; this can be set individually in iBiz Client.

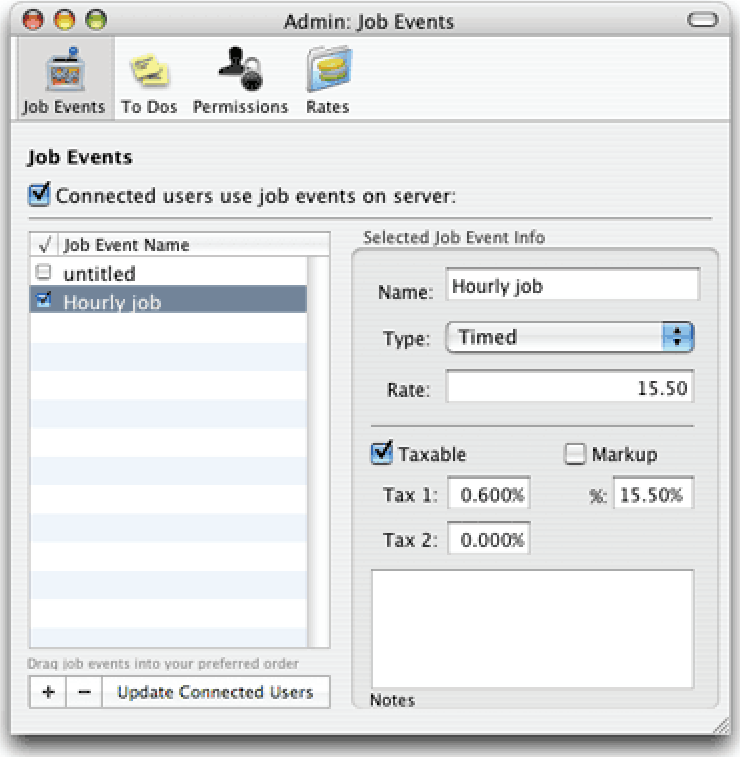
To change how project numbers are incremented: Again, choose iBiz Server>Preferences. Under the Client pane, you can choose whether new projects created by connected users are assigned incrementing numbers globally or for each client.

How do I access iBiz Server's administration features? (iBiz Server only)

iBiz Server offers a number of feature enhancements beyond simply allowing multiple users to share their iBiz data. Most of these options can be accessed via the Admin window. To open the Admin window, choose Server>Administration or click the Administration button on the toolbar (if you don't have an Administration button, see How do I customize the toolbar?).

How do I share custom job events over the network? (iBiz Server only)

Click the Job Events toolbar button in the Admin window (if you don’t have a Job Events button, see How do I customize the toolbar?), then check “Connected users use job events on server.”



Admin: Job Events
Job Events
To Dos
Permissions
Rates
Job Events
Job Event Name
Selected Job Event Info
Drag job events into your preferred order
+
−
Update Connected Users
Notes

☑ Connected users use job events on server:

☐ untitled
☑ Hourly job

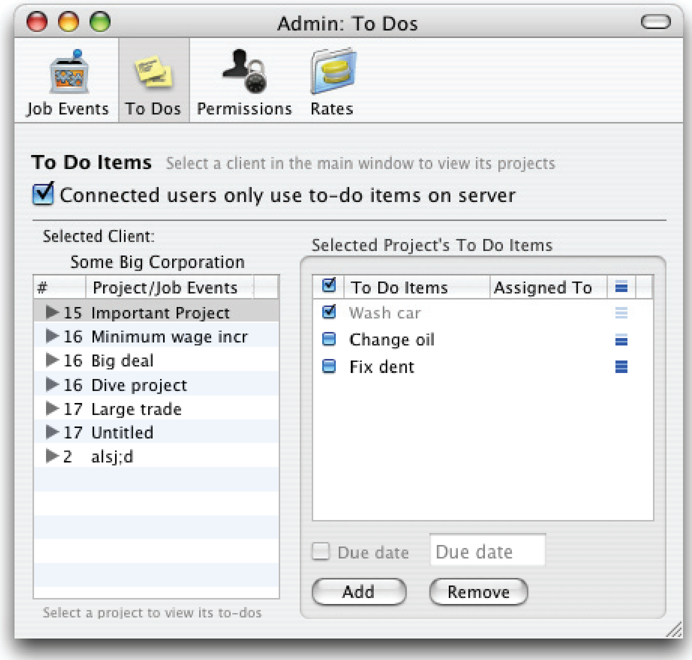
Name: Hourly job
Type: Timed
Rate: 15.50
☑ Taxable ☐ Markup
Tax 1: 0.600% %: 15.50%
Tax 2: 0.000%

When this option is enabled, all users see the same set of custom job events. They cannot edit these events or add their own; the custom job events can only be administered from iBiz Server. After making changes to job events in this window, click “Update Connected Users” to ensure that all connected users see the changes. Disabling “Connected users use job events on server” will allow each user to keep his or her own custom job events.

To manage custom job events on the server: Click “Add” to add a new custom job event to the list, and use the buttons to the right to edit its information as appropriate. Any event in the list with a check ☑ next to its name will be made available to connected users running [iBiz Client]() (as long as “Connected users use job events on server” is checked). Click “Remove” to delete a custom job event from the list.

How do I share To Do items over the network? (iBiz Server only)

Click the To Dos toolbar button in the [Admin window]() (if you don’t have a To Dos button, see [How do I customize the toolbar?]()), then check “Connected users only use to-do items on server.”



To Do Items Select a client in the main window to view its projects

☑ Connected users only use to-do items on server

Selected Client:
Some Big Corporation

#	Project/Job Events
▶ 15	Important Project
▶ 16	Minimum wage incr
▶ 16	Big deal
▶ 16	Dive project
▶ 17	Large trade
▶ 17	Untitled
▶ 2	alsj;d

Select a project to view its to-dos

Selected Project's To Do Items

☑	To Do Items	Assigned To
☑	Wash car	
☐	Change oil	
☐	Fix dent	

☐ Due date Due date

When this option is enabled, all users see the same To Do items. They cannot edit these items or add their own; the To Do items can only be administered from iBiz Server. Disabling "Connected users only use to-do items on server" will allow each user to keep his or her own To Do items.

TIP *Use To Do items to delegate work on a project! By typing names in your To Do items under "Assigned To," you can assign job events to individual iBiz Client users.*

To manage To Do items on the server:

Select a client from the left side of the Admin window to view its associated projects; select a project to display its associated To Do items. Click "Add" to add a new To Do item to a project. Most settings can be changed directly in the To Do list; double-click to change an item's name.

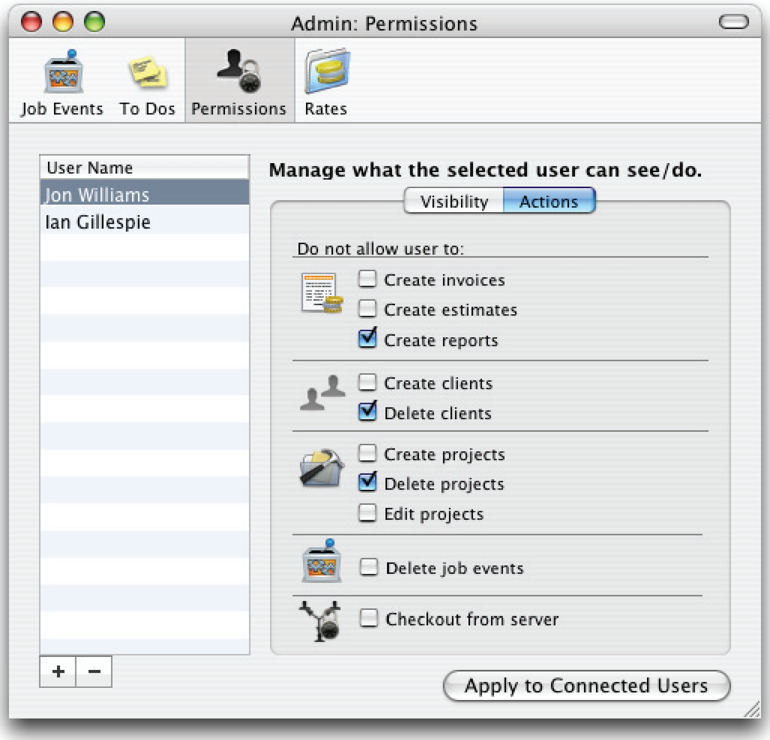
To assign a due date to an item, select it and click "Due date" at the bottom of the list. Type in the appropriate due date in the box to the right. Click "Remove" to delete a To Do item from the selected project. A gray exclamation image ⚠ appearing next to a To Do item indicates that the item is overdue.

How do I restrict user access with a password? (iBiz Server only)

To require iBiz Client users to enter a username and password before connecting to iBiz Server, open iBiz Server and choose iBiz Server>Preferences. Click the 🌐 Network tab, check "Require username and password to connect to iBiz Server," and enter a username and password. When iBiz Client users attempt to connect, they will be prompted to enter these; if the username and password provided do not match those specified in iBiz Server, the user will not be allowed to connect to the server.

How do I manage network user permissions? (iBiz Server only)

Click the Permissions toolbar button in the Admin window (if you don't have a Permissions button, see How do I customize the toolbar?) to set whether connected users running iBiz Client have restricted permissions to edit projects and job events.


Admin: Permissions
Job Events
To Dos
Permissions
Rates
Visibility
Actions
+
−
Apply to Connected Users

User Name
Jon Williams
Ian Gillespie

Manage what the selected user can see/do.

Do not allow user to:

☐ Create invoices
☐ Create estimates
☑ Create reports

☐ Create clients
☑ Delete clients

☐ Create projects
☑ Delete projects
☐ Edit projects

☐ Delete job events

☐ Checkout from server

Click the + button to add a new user to the list, then double-click it to type in the appropriate user name. Use the list of connected users to check which names to use. Once a user has been added to the list, you can restrict his or her access to various features within iBiz.

Under the “Visibility” tab, check the appropriate boxes to prevent the selected user from seeing any of the following:

- Billing section
- Project earnings
- Project balances
- Project estimates
- Job event rates
- Job event earnings

Under the “Actions” tab, check the appropriate boxes to prevent the selected user from doing any of the following:

- Creating invoices
- Creating estimates
- Creating reports
- Creating clients
- Deleting clients
- Creating projects
- Deleting projects
- Deleting job events
- Checking out from iBiz Server

To delete a user from the list and remove all his or her associated restrictions, select the user and click the − button.

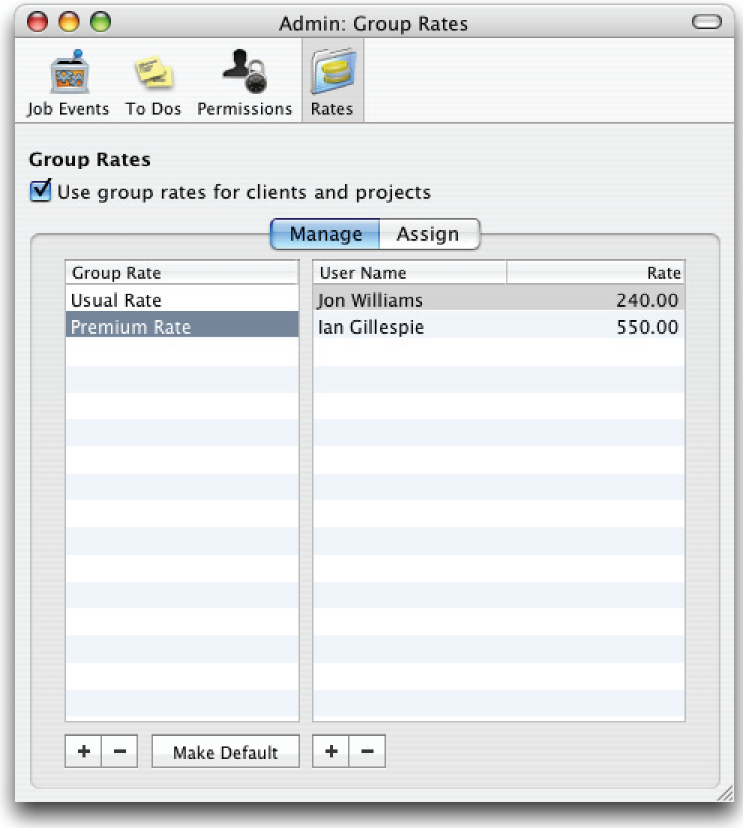
NOTE *Users who are permitted to checkout from iBiz Server will maintain their other permission settings while working offline.*

How do I assign group rates for work performed? (iBiz Server only)

Group rates allow you to set up different billing rates for your employees and then easily assign those rates on a per-client or per-project basis.

For example, you could create a "premium rate" for which Employee #1 bills at $75/hr and Employee #2 bills at $100/hr. You could then assign the "premium rate" to Customer XYZ: whenever Employee #1 or #2 works for Customer XYZ, their job events would take on the appropriate rates ($75 and $100, respectively).

To enable group rates: Click the Rates toolbar button in the [Admin window]() (if you don't have a Rates button, see [How do I customize the toolbar?]()), then check "Use group rates for clients and projects."


Admin: Group Rates
Job Events
To Dos
Permissions
Rates
Manage
Assign
+
−
Make Default
+
−

Group Rates

☑ Use group rates for clients and projects

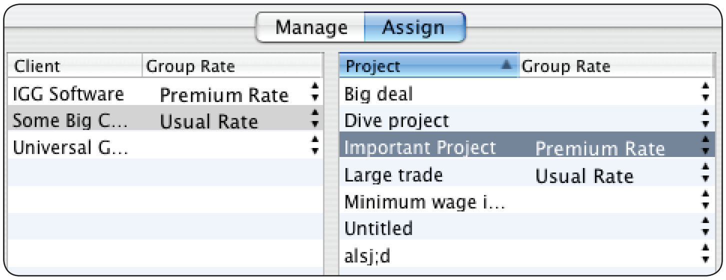
Group Rate
Usual Rate
Premium Rate

User Name	Rate
Jon Williams	240.00
Ian Gillespie	550.00

When this option is enabled, group rates will be applied as default rates to job events created by the specified users. Group rates are not set in stone: users can always change their rates from the default if necessary (provided they have permission to do so), even when a group rate has been applied. Disabling “Use group rates for clients and projects” will give priority back to individual users’ default rate settings.

To manage group rates on the server: Make sure the “Manage” tab is selected. Click the + button below the “Group Rate” list to create a new group rate, then double-click the item to give it a name. With the group rate selected, click the + button below the “User Name” list to add iBiz Client users to the group rate. Double-click the user’s name and rate to set them appropriately. Use the − buttons to remove group rates and users from their respective lists.

To assign group rates to clients/projects: Make sure the “Assign” tab is selected in the Admin window; your iBiz clients should appear on the left side. Select a client to view its associated projects.



Client	Group Rate
IGG Software	Premium Rate
Some Big C...	Usual Rate
Universal G...	

Project	Group Rate
Big deal	
Dive project	
Important Project	Premium Rate
Large trade	Usual Rate
Minimum wage i...	
Untitled	
alsj;d	

> **TIP** *Use “Make Default” to designate a group rate for use across the board. Select the group rate and click* [Make Default] *– it will be applied to all new job events created (for all projects and clients), unless a different group rate has been specified. To remove the default setting, select the default group rate and click “Make Default” a second time.*

Clicking the arrows under the “Group Rate” column for any client or project will present you with a list of your group rates; select one from this list to assign it to the chosen client/project. To remove a group rate from a client/project, select the client or project and click the “– Client Group Rate” or “– Project Group Rate” button, respectively.

How do I use iBiz Client? (iBiz Client only)

With only a few exceptions, iBiz Client works exactly the same as the stand-alone version of iBiz. The biggest difference is that iBiz Client must either be running on the same local area network as iBiz Server, or connected remotely via IP, in order to view and edit project information (unless you checkout from the server). If the server is not running or there is a network error, iBiz Client will not display any client or project data when it starts up.

Server connectivity: At the top of the iBiz Client window, to the far right side of the title bar, you will find a small icon that indicates your connection status:

🌐 = Connected. Client, project, and job event information is being presented directly from iBiz Server and any changes will be made in real-time over the network.

✕ 🌐 = Disconnected. Client, project, and job event information is not available. See iBiz Client won't connect to the server for help getting connected.

⚡ 🖴 = Checked out. Client, project, and job event information is cached on the local computer for offline editing. Don't forget to synchronize with iBiz Server as soon as you are able!

Shared items: iBiz Server can allow custom job events and To Do items to be shared among connected users. When these are being shared, you will see the same custom job events and/or To Do items as all other iBiz Client users. These are administered centrally from iBiz Server; when enabled, these cannot be modified in iBiz Client.

Invoice/estimate and report templates are stored centrally on iBiz Server. Any changes made by an iBiz Client user will affect the same templates used by all connected users; users cannot create or edit templates on their individual computers.

Additionally, the iBiz Server administrator may assign group rates to users for certain clients or projects, so that when you create a job event in those clients/projects, a default rate will automatically be applied. This rate is not locked, however; you can change it if necessary.

Client restrictions: Along with allowing users to share their iBiz data, iBiz Server permits the administrator to restrict individual iBiz Client users' access to that data. Depending on how your iBiz network has been configured, you may not be able to view certain project information, certain job event information, or the billing section. You may also be prohibited from creating invoices, estimates, or reports; creating or deleting clients or projects; deleting job events; or checking out from iBiz Server.

Can multiple users work on a project simultaneously? (iBiz Client only)

The iBiz Server/Client package allows multiple users to work on projects simultaneously. All connected users can make modifications to the same project; the changes will be updated on the server in real-time and made available to the other users almost immediately.

Two users cannot, however, log time on the same job event simultaneously. When one user is timing an event while connected to the network, other users will see a gray clock 🕒 next to the job event in iBiz Client and will not be allowed to modify it. Once the first user finishes timing the job event, it will become available for other users to edit (or another user to begin timing).

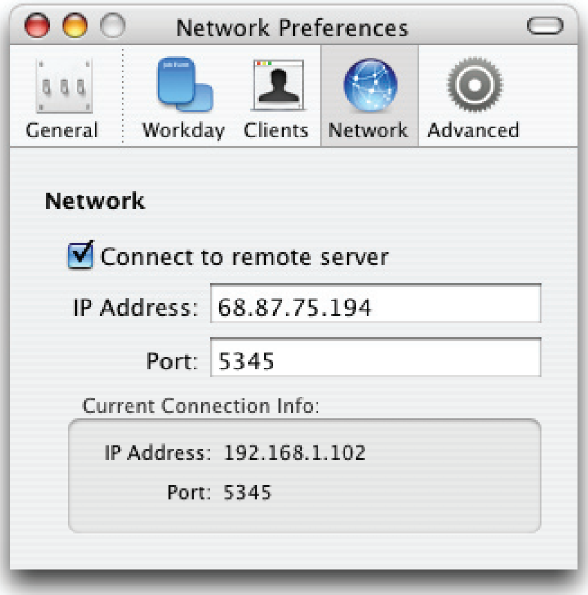
To force a timer to start or stop regardless of who is using it, Control-click on the job event and choose “Force Start/Stop Timer” from the contextual menu.

How do I access iBiz Server remotely? (iBiz Client only)

iBiz 3 no longer requires that all iBiz Client users be located within the same local area network (LAN) in order to connect to iBiz Server. Users can now connect their computers to the server via IP. No special configuration is required in iBiz Server to allow remote access; all of this is done through iBiz Client.

To configure iBiz Client to access a remote server:

1. Choose iBiz Client>Preferences, click the Network tab, and check “Connect to remote server.”
2. Enter the IP address of the computer running iBiz Server (ask your network administrator for this number if you don’t know it).
3. Enter a port number to use to connect to iBiz Server. This number must be between 5345 and 5351.



Network

☑ Connect to remote server

IP Address: 68.87.75.194

Port: 5345

Current Connection Info:

IP Address: 192.168.1.102

Port: 5345

NOTE *If the server computer has a firewall, you will need to open ports 5345-5351. If the computer is behind a router, you may also need to forward these ports from the router to the server. Contact your network administrator if you need assistance with these tasks.*

To connect to iBiz Server:

Once your settings have been configured in preferences, iBiz Client will automatically connect to the server on startup. To manually connect, click the Connect button on the

TIP *After connecting to iBiz Server, you can view your connection settings under the Network tab in iBiz Client>Preferences.*

toolbar (if you don't have a Connect button, see How do I customize the toolbar?).

To disconnect:

When you are connected, the toolbar button will change from Connect to Disconnect. Click the button to disconnect from iBiz Server.

To disable remote access and connect to a server on the local network, uncheck "Connect to remote server" in preferences.

Can I encrypt my network data for improved security? (iBiz Server/Client only)

iBiz Server automatically encrypts your client and project data using the Blowfish algorithm as it is relayed to and from iBiz Client. You can rest assured that your data is safe from prying eyes.

How do I work on projects while disconnected from iBiz Server? (iBiz Client only)

NOTE *Checking out from iBiz Server requires permission from the server. See How do I manage network user permissions? for more information.*

To perform work while disconnected from the server, iBiz Client users can "checkout" clients and their projects, and synchronize their changes when they reconnect to iBiz Server.

To checkout from iBiz Server: Choose File> Checkout From Server. In the window that appears, check off the project(s) you want to check out (or check a client to check out all projects associated with that client) and click "Checkout." You can then disconnect from the network, take your projects on the road and make changes.

When you checkout from iBiz Server, iBiz Client will make a copy of all of the clients and their associated projects on your local computer. Until iBiz Client is synchronized with iBiz Server, all changes made to a project will be saved locally. Invoices and estimates cannot be generated while checked out from the server.

To synchronize your changes: Reconnect your computer to the network where iBiz Server is running, open iBiz Client, and choose File>Synchronize With Server. iBiz Client will compare the date of the last time each job event was edited with information stored on iBiz Server to determine which change was made most recently. Both your data and the data on the server will be updated to reflect the most recent changes.

NOTE *Only changes made to a project by adding/deleting or editing job events, and adding/deleting To Do items can by synchronized with iBiz Server. That is, changes made to a project's name, start date or notes, for example, will not be transferred over to iBiz Server when synchronizing.*

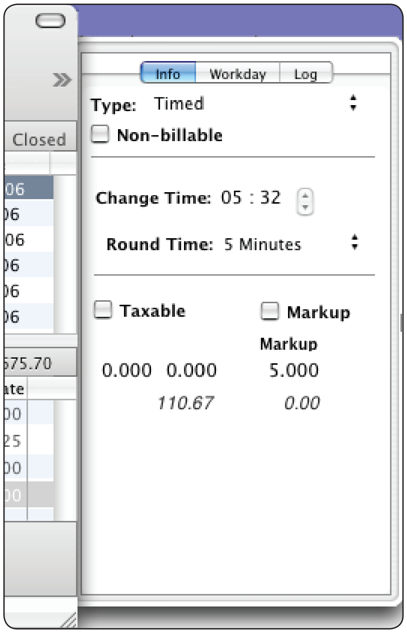
If there is a conflict between job events during synchronization, a window will appear asking you to choose which job event should be used. To select the event to use, click on the table with the correct job event and click the "Accept" button.

Once synchronization is complete, the data shown in iBiz Client will reflect that stored on the server, and live editing will resume.

Chapter 10: General Questions

How do I open the info drawer?

To open the info drawer, choose View>Info Drawer, or click the Info button on the toolbar (if you don't have an Info button, see How do I customize the toolbar? below). The info drawer will appear to the left or right side of the main iBiz window, depending on which side has more space available.



Type: Timed
☐ Non-billable
Change Time: 05 : 32
Round Time: 5 Minutes
☐ Taxable
☐ Markup
Markup
0.000 0.000 5.000
110.67 0.00

How do I customize the toolbar?

To customize the toolbar (located across the top of the main iBiz window) Control-click anywhere in the toolbar area and choose "Customize Toolbar" from the contextual menu. The sheet that appears will allow you to add or remove icons from your toolbar, and choose how these items are displayed. Click "Done" when you have finished customizing the toolbar.

You can show or hide the entire toolbar at any time by clicking the oval-shaped button in the top right corner of the main iBiz window (this is standard for most Mac OS X applications).

Additionally, you can adjust the size of the icons on the lower toolbars (underneath the project and job event lists) by Control-clicking in the toolbar area and choosing “Use Smaller Size” or “Use Larger Size.”

Can I use AppleScript or Automator with iBiz?

If you are handy with AppleScript or Automator, you can write scripts and workflows to streamline many repetitive tasks in iBiz, including project creation, invoice delivery, receipt of payments, and much more! Feel free to contact technical support for tips on how to better use AppleScript or Automator to get more out of iBiz.

How does iBiz integrate with iBank?

If you use iBank to manage your finances, you can use iBiz to create transactions from your projects and job events. Click the iBank toolbar button (if you don’t have an Info button, see How do I customize the toolbar?) and choose “Launch iBank” if iBank is not already running.

Once iBank is open, select a single project or job event in iBiz (you can only send one at a time), click the iBank toolbar button, and select the iBank account to which you want to add the transaction. By default, job events are added as withdrawals with the job event names listed under Payee. Projects are added as deposits with the client names listed under Payee.

You can also have iBiz automatically add deposits in iBank based on payments received – see How do I add or delete invoices, estimates, or payments? for more details.

How do I update iBiz?

Our development staff is constantly working to make iBiz a better application; as a result, updates are frequently made available for download from our website. As long as the main version number matches the one you purchased, it is free to install – your original registration code will be automatically recognized. That means if you purchased iBiz 3, v3.01, v3.1, v3.25, etc. are all free to you! Check the following page frequently to stay up-to-date:

http://www.iggsoftware.com/ibiz/index.html

When will I have to upgrade?

Each major version of iBiz released is considered to be a paid upgrade; that is, if you purchased iBiz 3 and we release iBiz 4, you will have to pay an additional fee to upgrade. Our promise to you is that we will not release major versions less than one year apart. Additionally, we frequently offer reduced pricing for upgrading users of previous versions. Visit our order page for more details:

https://secure.iggsoftware.com/store/

How do I backup my iBiz data?

To ensure that you data is protected in the event of a hard drive crash, program error, or other unexpected issue, we recommend that you backup your iBiz data regularly. Copy the following files from your computer to a separate backup drive:

For iBiz (stand-alone version):

- ~/Library/Application Support/IGG Software/iBiz/
- ~/Library/Application Support/AddressBook/
- ~/Library/Application Support/iCal/Sources/
- ~/Library/Preferences/com.iggsoftware.iBiz.plist

TIP *If you only want to backup a single project, you can quickly locate it by Command-clicking the project in iBiz and choosing "Reveal in Finder" from the contextual menu. The project file will appear highlighted in the Finder.*

For iBiz Client:

- ~/Library/Application Support/IGG Software/iBiz/
- ~/Library/Preferences/com.iggsoftware.iBizClient.plist

For iBiz Server:

- ~/Library/Application Support/IGG Software/iBiz/
- ~/Library/Application Support/AddressBook/
- ~/Library/Application Support/iCal/Sources/
- ~/Library/Preferences/com.iggsoftware.iBizServer.plist

The '~' denotes your user folder.

To simplify the backup process, use AppleScript, or download the iBiz Quickpick for Apple Backup from our website.

How do I move my iBiz data to a new computer?

When changing computers, there are several files that should be copied over to ensure that iBiz makes the transition smoothly:

For iBiz (stand-alone version):

- iBiz (wherever you chose to keep the application)
- ~/Library/Application Support/IGG Software/iBiz/
- ~/Library/Application Support/AddressBook/
- ~/Library/Application Support/iCal/Sources/
- ~/Library/Preferences/com.iggsoftware.iBiz.plist

For iBiz Client:

- iBiz Client (wherever you chose to keep the application)
- ~/Library/Application Support/IGG Software/iBiz/
- ~/Library/Preferences/com.iggsoftware.iBizClient.plist

For iBiz Server:

- iBiz Server (wherever you chose to keep the application)
- ~/Library/Application Support/IGG Software/iBiz/
- ~/Library/Application Support/AddressBook/
- ~/Library/Application Support/iCal/Sources/
- ~/Library/Preferences/com.iggsoftware.iBizServer.plist

The '~' denotes your user folder.

After copying all appropriate files to the new computer, check to be sure that your clients and projects are available in iBiz. If you see your clients, but no projects are visible, see Some of my projects are missing! for help with restoring your projects.

How do I change the code used to register a copy of iBiz?

To “un-register” a copy of iBiz, delete the appropriate preferences file:

- iBiz (stand-alone version): ~/Library/Preferences/com.iggsoftware.iBiz.plist
- iBiz Client: ~/Library/Preferences/com.iggsoftware.iBizClient.plist
- iBiz Server: ~/Library/Preferences/com.iggsoftware.iBizServer.plist

The ‘~’ denotes your user folder.

The next time you start iBiz, you will be asked to register again.

Chapter 11: Basic Troubleshooting (FAQ)

I lost my registration code! How can I retrieve it?

If you lost your code, please send an email to support@iggsoftware.com and we will search our purchase database.

One of my clients is showing a question mark! How can I fix this?

Please see Why does my client's card show a question mark? in the Clients section.

Some of my projects are missing! How can I get them back?

If you can see all of your clients in the client list, but no projects are visible in the project list, don't panic. First, check the following:

- The Projects tab should be selected in the main iBiz window. If the Billing tab is selected, you will not be able to view your projects.
- Make sure your projects are not filtered out: choose Project>Show All Projects.
- Make sure you have a client selected that should contain projects. Click the "All" client to see if any projects are present in iBiz.

After checking these three things, if your projects are still not visible, follow these steps to reload your projects into iBiz:

iBiz (stand-alone):

- In the Finder, browse to the following folder: ~/Library/Application Support/IGG Software/iBiz/Projects/ (the '~' represents your home folder). You should see a bunch of files with long, unintelligible names (each one of these represents a single iBiz project).

- Select all of these files, then drag and drop them onto the "All" client in the main iBiz window. The projects should load back into iBiz, ready for editing once again.
- You may need to reassign the projects to their appropriate clients by selecting the "All" client to view your projects, then dragging and dropping each one onto the client to which it belongs.

iBiz Server/Client:

- On the computer running iBiz Server, browse to the following folder in the Finder: ~/Library/Application Support/IGG Software/iBiz/Projects/ (the '~' represents your home folder). You should see a bunch of files with long, unintelligible names (each one of these represents a single iBiz project).
- Select all of these files, then drag and drop them onto any client *except* the "All" client in the iBiz Server window. Open iBiz Client to verify that the projects are loaded back into iBiz, ready for editing once again.
- You may need to reassign the projects to their appropriate clients by opening iBiz Client, selecting the client onto which you dropped your projects, then dragging and dropping each project onto the client to which it belongs.

I accidentally deleted a project! How can I get it back?

Please see How can I recover a deleted project? in the Projects section.

Why isn't my Document Monitor working?

Document Monitor requires Universal Access to be enabled on your computer. Make sure "Enable access for assistive devices" is checked under the Universal Access pane in System Preferences.

Why does iBiz show a blinking magic wand in the Dock?

This icon is displayed whenever iBiz is monitoring your activity. You are either using the Document Monitor or working on a file that is kept in the File Cabinet. You can disable the blinking wand by unchecking "Blink dock icon" in the Document Monitor window.

iBiz Client won't connect to the server. What's wrong? (iBiz Client only)

First, check to make sure that the installed versions of both iBiz Server and iBiz Client are exactly the same. Even a slight mismatch between version numbers can cause communication problems between client and server. For this reason, we encourage that updates are made across the network simultaneously. This is the cause of the majority of iBiz network problems. If that doesn't resolve the problem, read on.

Local network users:

iBiz Client must be on the same subnet as iBiz Server; the networking technology used requires this. iBiz utilizes Bonjour (aka Zero Conf) technology to ensure simple, no-hassle network connectivity.

You can test the network by running iChat and checking to see if Bonjour users can see one another – if Bonjour doesn't work with iChat, then it won't work with iBiz either. If you have a firewall installed, you may need to open ports 5345 through 5351 to allow iBiz Client to connect to the server.

If you are on the same network and still can't connect, or your connection drops frequently, try increasing the ping time in iBiz Server (iBiz Server>Preferences, under the Network pane).

Remote users (connected via IP):

Double-check that you have entered the correct IP address to connect to iBiz Server under iBiz Client>Preferences>Network. This should not start with "192.168..." as this typically indicates an address on a local network. Make sure the port number falls between 5345 and 5351. If you have a firewall installed, you may need to open that port to allow iBiz Client to connect.

If you have verified these settings and still can't connect, you may need to check with your Internet Service Provider (ISP) or network administrator regarding proxy and/or port forwarding settings. If your connection drops frequently, try increasing the ping time in iBiz Server (iBiz Server>Preferences, under the Network pane).

If you try these things and iBiz Client still can't connect to the server, please check the Console log and report any errors back to us at IGG Software. See How do I check the Console log? for more information.

iBiz crashed! What do I do next?

In the event of a crash, make note of what you were doing before the crash occurred, recalling the exact steps you took leading up to the crash if possible. Send an email to support@iggsoftware.com alerting us to the problem. Please be sure to include the name and version number of the program you are using, a detailed description of the problem, and any information that might help us to reproduce the crash.

If a crash report is generated, choose the option to view this report, then use copy and paste to include it in your email. This information is particularly valuable in helping us to isolate bugs in the software.

If a problem occurs frequently, but does not produce a crash report, check the Console log and report any errors. See How do I check the Console log? below for more information.

How do I check the Console log?

The Console application, which comes installed with Mac OS X, is a helpful tool for tracking errors generated by any application. If a problem occurs in iBiz, you can often find helpful messages contained in the Console log.

To check this log, go to the Finder and open Applications/Utilities/Console. Return to iBiz and take whatever steps will reproduce the problem. Then switch back to Console and look to see if any new lines of text have been added. If they have, and you wish to report this to us, copy and paste those lines into an email and send it to support@iggsoftware.com. The message will likely help us to isolate the problem and fix it quickly.

Where can I find help or get additional support?

In addition to this manual, we offer free technical assistance via email and an interactive Web user forum. Please feel free to contact us at any time; we will be sure to respond to your inquiry in a timely and effective manner.

Please direct your email inquiries to the appropriate address:

- Technical support: support@iggsoftware.com
- General inquiries: info@iggsoftware.com
- Bug reports: bugs@iggsoftware.com
- Feature requests: feature_requests@iggsoftware.com

Or visit our online discussion forums: http://www.iggsoftware.com/forums/

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