



iBiz Quick Start Guide

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



IGG SOFTWARE

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Main Uses for iBiz

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



iBiz Basics

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



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



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



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



The Main iBiz Window

The screenshot shows the iBiz software interface with several key components highlighted by red callout boxes:

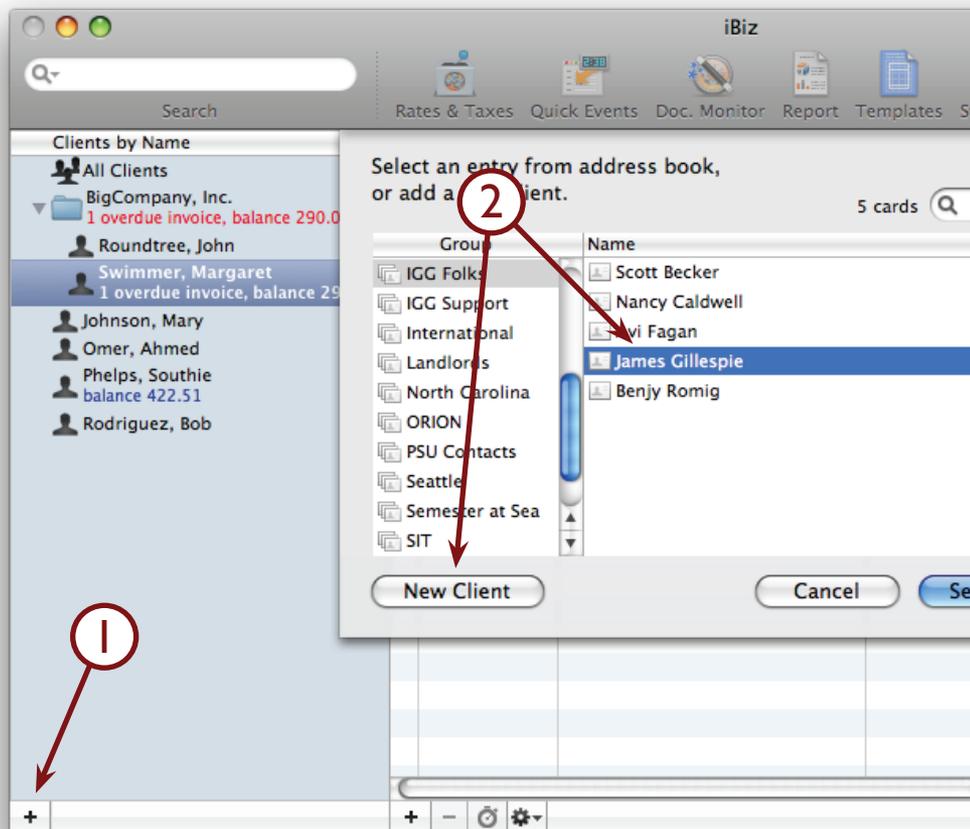
- Client list:** A sidebar on the left titled "Clients by Name" listing various clients such as "BigCompany, Inc.", "Roundtree, John", and "Phelps, Southie".
- Project list:** A table at the top showing project details. The table has columns for Status, #, Name, Start Date, Due Date, Time, Estimate, and Earnings. It lists three projects: "BrandNewSite.com", "SomethingCool.com", and "GoodIdeas.com".
- Job event list:** A table at the bottom showing job events. The table has columns for Date, Job Event, Time, Rate, and Amount. It lists events such as "Initial consultation", "Conceptual design", "Meeting w/client", and "Site development".
- Inspector:** A floating window in the center-right that displays details for the selected "Site development" job event, including its name, type, rate, time, and dates.
- Info pane:** A vertical pane on the right side showing a Gantt chart for the "Site development" job event, with a blue bar representing the duration from 9:00 AM to 4:00 PM on 07/25/07.

STATUS	#	NAME	START DATE	DUE DATE	TIME	ESTIMATE	EARNINGS	NOTES
On Hold	001	BrandNewSite.com	7/15/07	8/15/07	23:00	0.00	1,185.00	
Closed	002	SomethingCool.com	8/15/07	9/15/07	35:00	0.00	1,815.00	
Closed	003	GoodIdeas.com	12/1/08	1/15/09	07:39	0.00	417.50	taxes applied

DATE	JOB EVENT	TIME	RATE	AMOUNT	NOTES
7/15/07	Initial consultation	NA	35.00	35.00	
7/20/07	Conceptual design	07:00:00	50.00	350.00	
7/21/07	Meeting w/client	01:00:00	50.00	50.00	
7/25/07	Site development	07:00:00	50.00	350.00	
7/28/07	Meeting w/client	01:00:00	50.00	50.00	
8/1/07	Site development	07:00:00	50.00	350.00	



Adding a Client



1. Click the ‘+’ button in the lower-left corner of the main window and choose “Add Client.”

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

or:

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



Adding a Project

1. Select a client.
2. Make sure the “Projects” tab is selected.
3. Click the ‘+’ button at the bottom of the project list – a new “Untitled” project will be added to the list.
4. Double-click the project to open the inspector and enter the project details.

The screenshot shows the iBiz software interface. The 'Projects' tab is selected, displaying a table of projects. The table has columns for Status, #, Name, Start Date, Due Date, Time, Estimate, Earnings, and Notes. The third project, 'GoodIdeas.com', is highlighted in red. A red circle with the number '1' points to the client list on the left. A red circle with the number '2' points to the 'PROJECTS' tab. A red circle with the number '3' points to the '+' button at the bottom of the project list. A red circle with the number '4' points to the 'Notes' column of the highlighted project.

Status	#	Name	Start Date	Due Date	Time	Estimate	Earnings	Notes
On Hold	001	BrandNewSite.com	7/15/07	8/15/07	23:00	0.00	1,185.00	
Closed	002	SomethingCool.com	8/15/07	9/15/07	35:00	0.00	1,815.00	
Closed	003	GoodIdeas.com	12/1/08	1/15/09	07:39	0.00	417.50	taxes applied

Adding Job Events

ESTIMATE		WORK			
I	Date	Job Event	Time	Rate	Amo
<input type="checkbox"/>	5/2/07	Initial consultation	NA	35.00	35
<input type="checkbox"/>	5/3/07	Conceptual design	05:23:00	50.00	269
<input type="checkbox"/>	5/4/07	Meeting w/client	01:00:00	50.00	50
<input type="checkbox"/>	5/6/07	Site development	31:00	50.00	1,550
<input type="checkbox"/>	5/13/07	Hosting setup fees	NA	30.00	30
<input type="checkbox"/>	5/14/07	Deployment	05:00:00	50.00	250
<input type="checkbox"/>	5/16/07	Deployment	03:45:00	50.00	187
<input type="checkbox"/>	5/22/07	Follow-up maintenance	02:15:00	50.00	112

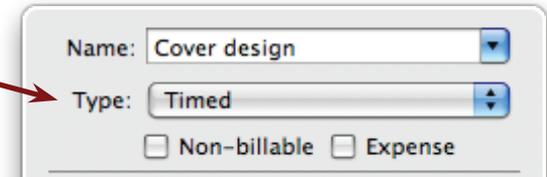
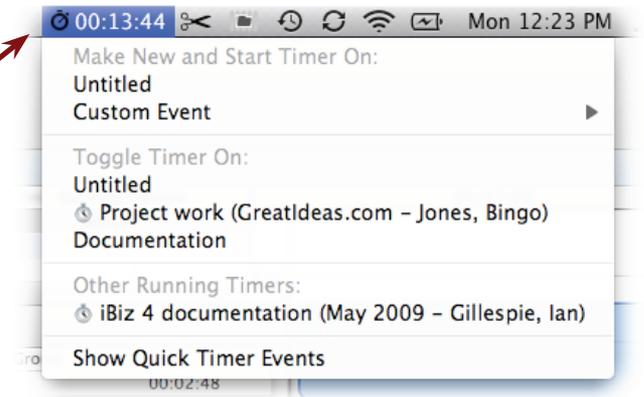
Buttons: +, -, [stopwatch], [gear]

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



More About Job Events

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



Creating an Invoice

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

Invoice preview for Omer, Ahmed

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 database.

Client: Omer, Ahmed

Due date: 6/12/2009
 Add due date to iCal
Calendar: IGG Software
Alarm: Message
2 days before

Unpaid balance: 0
Project(s) total: 2,484.17
New balance: 2,484.17

May 12, 2009 [MY COMPANY] [MY STREET] [MY CITY] [MY STATE] [MY ZIP] [MY EMAIL] [MY PHONE]

invoice no. 8
page 1 of 2
amount due \$2,484.17

Attn: Ahmed Omer
[CLIENT FAX] Project No. 001

ITEM	DESCRIPTION	QTY.	PRICE	EXT.
Initial consultation		NA	35.00	35.00
Conceptual design		05:23	50.00	269.17
Meeting w/client		01:00	50.00	50.00
Site development		07:00	50.00	350.00
Site development		07:00	50.00	350.00
Meeting w/client		01:00	50.00	50.00
Site development		05:00	50.00	250.00
Site development		05:00	50.00	250.00
Site development		05:00	50.00	250.00
Hosting setup fees			30.00	30.00
Deployment		05:00	50.00	250.00
Deployment		03:45	50.00	187.50
Follow-up maintenance		02:15	50.00	112.50

SUBTOTAL \$2,484.17
DISCOUNT \$0.00
SALES TAX \$0.00
PREVIOUS BALANCE \$0.00
TOTAL AMOUNT DUE \$2,484.17

INVOICE

Delivery Options

Cancel Done

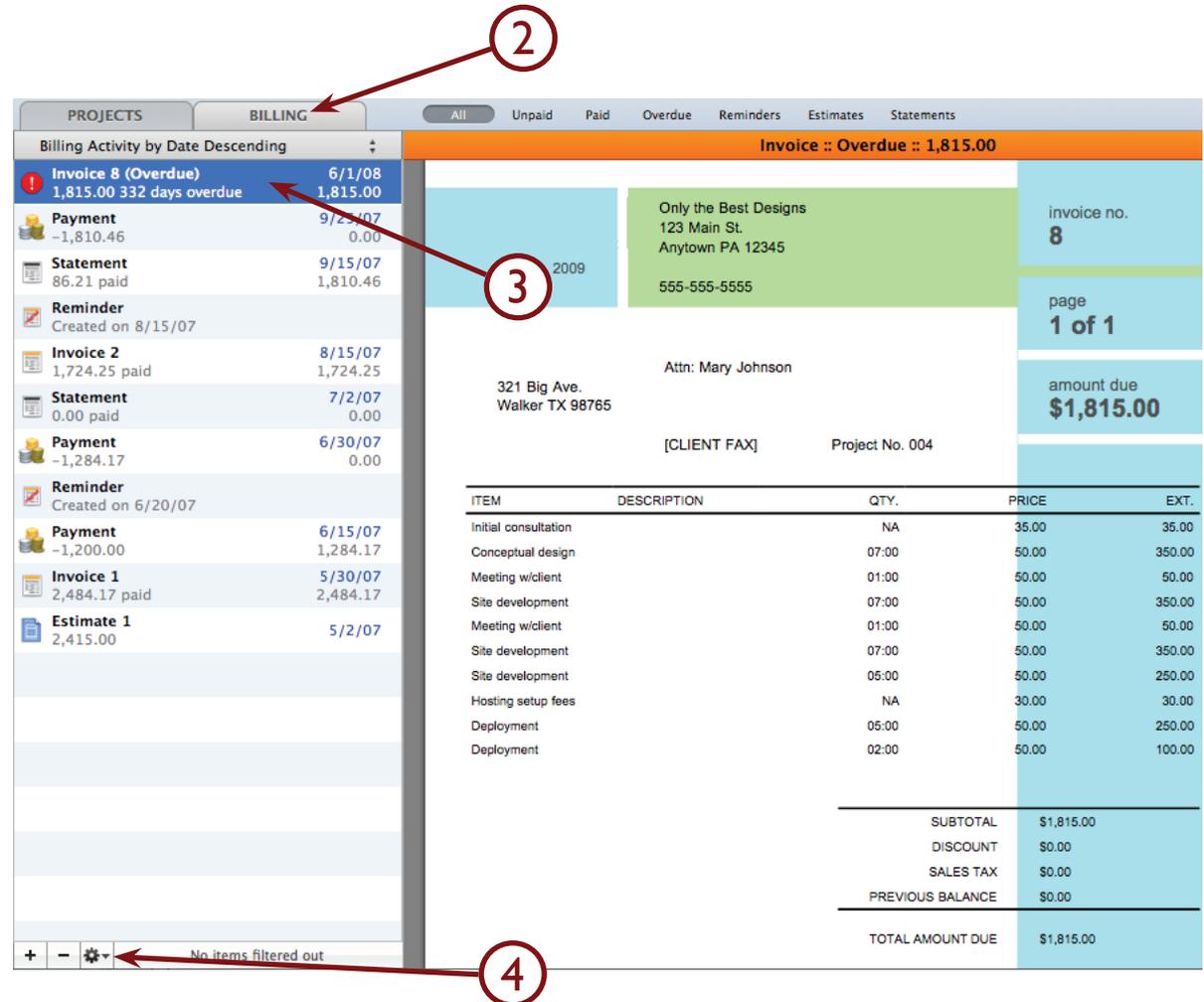
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6

Receiving a Payment

1. Select the client from whom you are receiving payment.
2. Click the “Billing” tab to view a history of invoices, payments, and other account activity. The client’s current balance is displayed next to the most recent billing item.
3. Select the invoice for which you are receiving payment.
4. Click the  button at the bottom of the list and choose “Add Payment for Selected Invoice.” iBiz will open the popup inspector so that you can edit the payment details.



The screenshot displays the 'Billing' tab in the iBiz software. The left sidebar shows a list of billing activities for 'Overdue' status, sorted by date descending. The most recent item is 'Invoice 8 (Overdue)' for 1,815.00, which is 332 days overdue. Other items include payments and statements for previous invoices. The main area shows the details for 'Invoice 8', including the client name 'Only the Best Designs', address '123 Main St. Anytown PA 12345', and phone number '555-555-5555'. The invoice number is 8, and the amount due is 1,815.00. The invoice items table lists various services such as 'Initial consultation', 'Conceptual design', 'Meeting w/client', 'Site development', 'Hosting setup fees', 'Deployment', and 'Deployment' with their respective quantities, prices, and extended amounts. The total amount due is 1,815.00. Red arrows and circles highlight the 'Billing' tab, the 'Invoice 8 (Overdue)' entry, the invoice details section, and the gear icon at the bottom of the list.

ITEM	DESCRIPTION	QTY.	PRICE	EXT.
Initial consultation		NA	35.00	35.00
Conceptual design		07:00	50.00	350.00
Meeting w/client		01:00	50.00	50.00
Site development		07:00	50.00	350.00
Meeting w/client		01:00	50.00	50.00
Site development		07:00	50.00	350.00
Site development		05:00	50.00	250.00
Hosting setup fees		NA	30.00	30.00
Deployment		05:00	50.00	250.00
Deployment		02:00	50.00	100.00
SUBTOTAL			\$1,815.00	
DISCOUNT			\$0.00	
SALES TAX			\$0.00	
PREVIOUS BALANCE			\$0.00	
TOTAL AMOUNT DUE			\$1,815.00	

Receiving a Payment (cont.)

5. The amount of the invoice will automatically appear in the “Amount” field. Edit this amount if the payment received did not equal the invoice amount.
6. The “Allocate to Invoices” section directs payment funds towards specific invoices. Adjust the allocations if you want the payment directed to more than one invoice.
7. Click “Done” to save the payment details. iBiz will automatically mark the invoice as “Paid” in the billing list (assuming it was paid in full).

Payment
Johnson, Mary

Amount: 1,996.50 Date: 5/14/2009

Notes: check #1234

iBank Options

Put in account Checking

Launch iBank

▼ Allocate to Invoices (optional)

Allocate To:	Invoice Bal.	Amt. to Apply
Invoice 8	1,815.00	-1,815.00
Statement 5/13/09 ...	181.50	-181.50

+ - Amount remaining: 0.00

Done



Creating a Statement

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

Create Statement for Client
Check off the invoices and payments you want to include in the statement

Kind	#	Status	Date	Amount
<input type="checkbox"/> Invoice	1	Paid	5/30/07	2,484.17
<input type="checkbox"/> Payment	#		6/15/07	-1,200.00
<input type="checkbox"/> Payment	#		6/30/07	-1,284.17
<input type="checkbox"/> Statement	#		7/2/07	0.00
<input checked="" type="checkbox"/> Invoice	2	Paid	8/15/07	1,724.25
<input checked="" type="checkbox"/> Statement	#	Paid	9/15/07	86.21
<input checked="" type="checkbox"/> Payment	#		9/25/07	-1,810.46
<input checked="" type="checkbox"/> Invoice	8	Overdue	6/1/08	1,815.00

Report on activities between dates
Start: 9/15/2007
End: 5/13/2009

Add late fee
 % based 10.000%
 flat rate

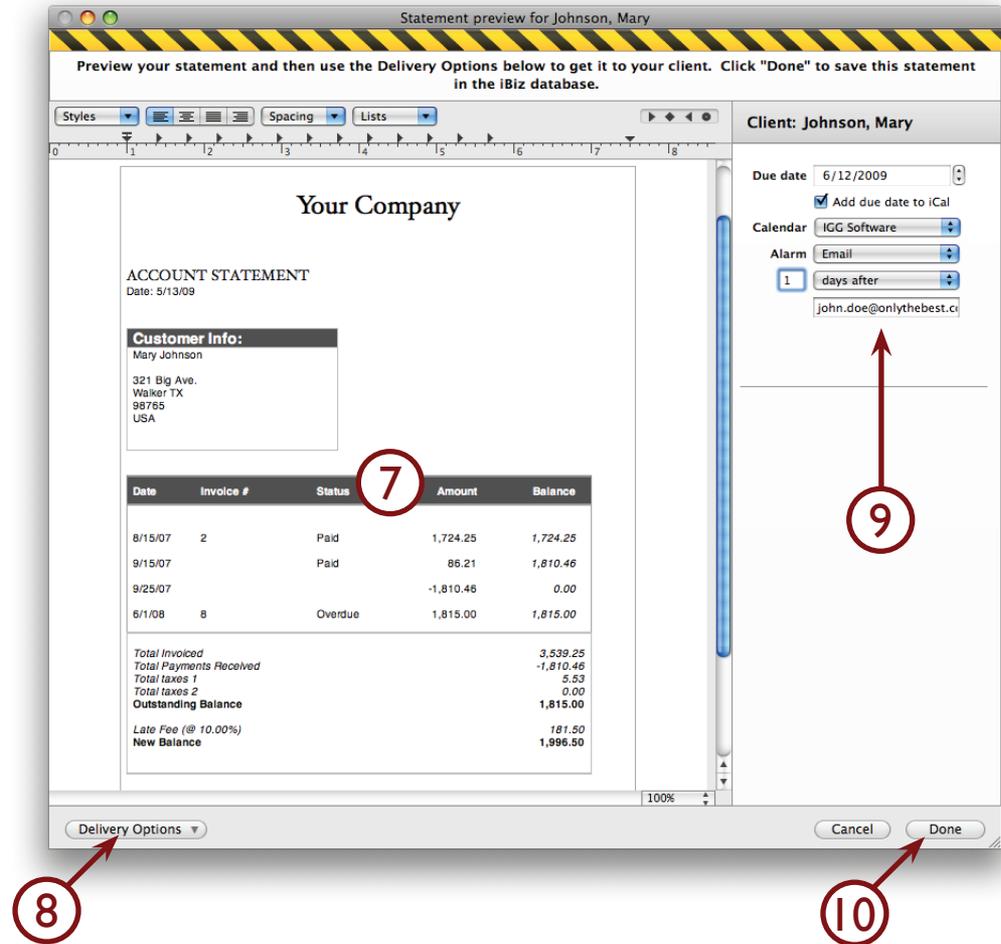
Statement Template: Statement

Cancel Make Statement



Creating a Statement (cont.)

7. Review the information for accuracy, cancel and make changes to the billing items if necessary.
8. Click “Delivery Options” and choose whether to print the statement and/or email it to the client.
9. Adjust the due date if necessary and create a reminder in iCal.
10. Click “Done” to save the statement under the client’s billing account.



Generating a Report

1. Select the client(s) upon which you want to report.
2. Click “Report” on the toolbar.
3. On the sheet that appears, check which projects you want to report on.
4. Specify a range of dates, if desired.
5. Click “Generate Report.”
6. The Reports window will appear. Click the appropriate tabs to view information about your clients, projects, and job events, or click “Summary” to view reports generated from your installed templates.



Wrapping Up

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



Thank you for trying iBiz!

