



Fann Software AnTimeBiller

Users' Guide

Version 1.0

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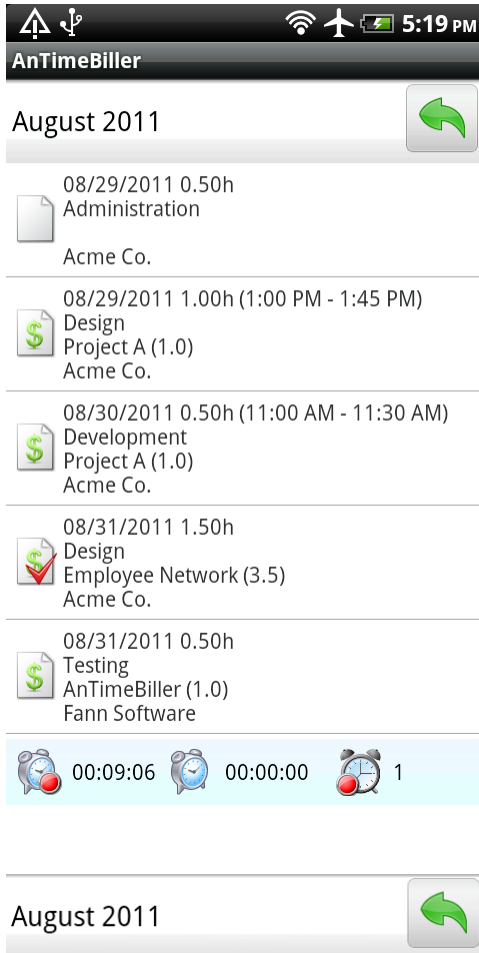
Overview

TimeBiller is a time and billing tracking program. Features:

- Multiple clients and projects tracking
- Expense tracking
- Define clients with associated projects, tasks, contacts, and rates
- Multiple rates for each client including fixed rate
- Display entries by day, week, month, or a custom period
- Optional duration granularity (minimum duration interval) and break time
- Time Entry Preview screen
- Handy entry copy feature for repetitive tasks for the rest of the week, to a specified date or end date
- Track billable, non billable, billed, and paid tasks
- Customizable HTML reporting
- Export data to CSV for further analysis
- Drop lists for efficient data entry
- Create entries using multiple timers
- Custom fields for time and expense entry
- Respective user interface design for tablets and phones

Using AnTimeBiller






Main Screen



The main screen is divided into 3 panes.

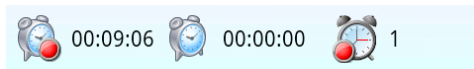
The date bar displays the date selection on the left and the Today button on the right:

- Touch on the date selection to change date

	08/29/2011 0.50h Administration Acme Co.
	08/29/2011 1.00h (1:00 PM - 1:45 PM) Design Project A (1.0) Acme Co.
	08/30/2011 0.50h (11:00 AM - 11:30 AM) Development Project A (1.0) Acme Co.
	08/31/2011 1.50h Design Employee Network (3.5) Acme Co.
	08/31/2011 0.50h Testing AnTimeBiller (1.0) Fann Software

The middle section lists the time entries (if any) for the current filter and date selection.

- Swipe left or right to change period or date
- Touch and hold on an entry to display the context menu for more options
- Touch an entry to display the Entry Preview screen



The timer status bar can display up to 4 timers depending on the device. Touch a running timer to display the context menu for options. The last pane on the status bar displays the number of running timers. Touch the pane to view all timers.

To help you use AnTimeBiller in the most efficient way, press the Menu key and select More→Options to set various defaults and options on the first run.

To setup clients, press the Menu key and select More→Setup clients.

Setup Clients

You must create a client structure before creating time entries. Client structure has the following properties:

- A project is associated to a client.
- A task is associated to a client or project.
- A contact is associated to a client.

To create a client structure:

1. From main screen, press the Menu key and select More→Setup clients.
2. To add a client, press the Menu key and select New client.
3. Enter the name of the client and touch the OK button.
4. Select the client you want to add a project, task, contact, or rate.
5. Press the Menu key and select the desired item.
6. Enter the name of the item and touch the OK button, or enter the desired information and touch the OK button.
7. The new item is displayed under the appropriate folder.






8. Repeat step 2 to 7 until you are done.
9. Press the Back key to return to the client screen.
10. Press the Back key to return to the main screen.

To create a task for a project:

1. Select the project you want to add a task.
2. Touch the New task button.
3. Enter the task name and touch the OK button.

You can setup multiple rates for each client.

Rate Types

Type	Special Comment
 Normal rate	Standard rate per hour
 Overtime rate	
 Weekend rate	
 Fixed rate	Charge per use
 Discount rate	

Note: Any modification of rates will change the rates used in existing time entries.

To edit/delete a client/project/task/contact/rate, touch and hold on the item to display the context menu for the desired option. Touch a task/contact/rate will also open the item edit screen.

You can import a list from a text file.

To import a text file:

1. Create a text file with each item on its own line.
2. Touch and hold on the project/task/contact and select Import.
3. Select the source file to import.
4. Touch the Import button to confirm.
5. The imported items are displayed.

To import clients, press the Menu key and select Import in the client screen.

Create an Entry

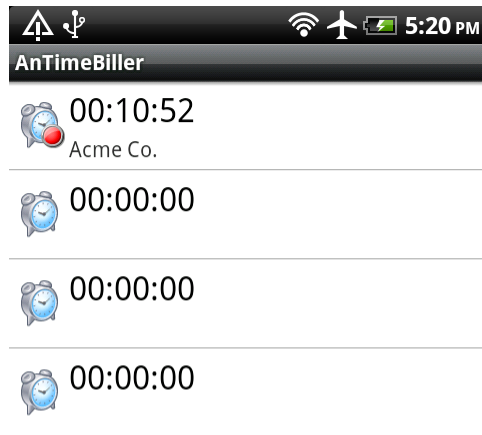
The screenshot shows the 'AnTimeBiller' app interface. At the top, there is a status bar with icons for home, back, Wi-Fi, airplane mode, and battery, along with the time '5:20 PM'. Below the status bar, the app title 'AnTimeBiller' is displayed. The main form consists of several fields and buttons:

- Date:** A button labeled 'Friday, Sep 2 2011'.
- Client:** A dropdown menu showing 'Acme Co.' with a downward arrow.
- Project:** A dropdown menu showing '(Non Project Tasks)' with a downward arrow.
- Phase:** An empty text input field with a green border.
- Task:** A dropdown menu showing 'Administration' with a downward arrow.
- Duration: (hour : minute):** A numeric keypad with '+' and '-' buttons for hours and minutes, and a 'Set time' button.

1. From main screen, press the Menu key and select New.
2. Select a date for the entry. The default is today.
3. Select a client.
4. (Optional) Select a project.
5. (Optional) Enter a phase.
6. Select a task.
7. (Optional) Enter/Select a duration in hours:minutes, or touch the Set time button to enter a start, break, and/or end time.
8. (Optional) Select a status.
9. (Optional) Select a contact for bill to.
10. (Optional for paid entry only) Touch the Set button to enter a custom paid date.
11. (Optional) Select a rate or select (Custom Rate) to enter a custom rate.
12. (Optional) Enter a currency.
13. (Optional) Enter a description for each custom field.
14. (Optional) Enter the desired note information.
15. Touch the Save button to save the entry, or the Cancel button to discard.

Create an Entry Using a Timer

This feature is most useful if you require accurate duration information.



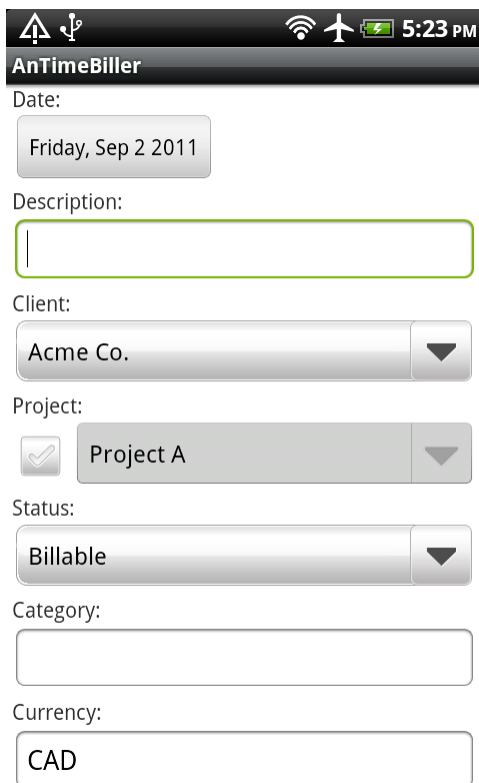
1. From main screen, touch the Timer icon to start a timer.
2. (Optional) Select a client.
3. (Optional) Select a project.
4. (Optional) Enter a phase.
5. (Optional) Select a task.
6. (Optional) Check the check box on Start time to enter a start time.
7. Touch the Start button to return to the main screen.
8. (Optional) Touch the running timer and select Pause to pause for breaks, and uncheck Pause to resume recording.
9. (Optional) Touch the running timer and select Edit note to enter note information.
10. Touch the running timer and select Complete when finished to create the time entry, or select Cancel to cancel the recording.
11. Select/Enter the appropriate information in the entry screen.
12. Touch the Save button to save the entry.

Note:

- The device can be turned off or you can run other applications during recording, the timer will calculate the elapsed time when you turn the device back on or upon return.
- Do not exit AnTimeBiller while the timer is running, otherwise all timer information will be lost. To set timer option for warning before exit, press the Menu key and select More→Options→Timer.

Create an Expense Entry

General Expense



The screenshot shows the AnTimeBiller app interface. At the top, there is a status bar with icons for signal strength, Wi-Fi, airplane mode, battery, and the time 5:23 PM. Below the status bar is the app title "AnTimeBiller". The form consists of several fields: "Date:" with a dropdown menu showing "Friday, Sep 2 2011"; "Description:" with a text input field; "Client:" with a dropdown menu showing "Acme Co."; "Project:" with a checked checkbox and a dropdown menu showing "Project A"; "Status:" with a dropdown menu showing "Billable"; "Category:" with a text input field; and "Currency:" with a text input field showing "CAD".

1. From main screen, press the Menu key and select Expenses.
2. Press the Menu key and select New general.
3. Select a date for the entry. The default is today.
4. Enter a description.
5. Select a client.
6. (Optional) Check the check box under Project to select a project.
7. (Optional) Select a status.
8. (Optional) Enter a category.
9. (Optional) Enter a currency.
10. (Optional) Enter an amount.
11. (Optional) Check the Receipt supplied check box.

12. (Optional) Select a contact for bill to.
13. (Optional for paid entry only) Touch the Set button to enter a custom paid date.
14. (Optional) Enter a description for each custom field.
15. (Optional) Enter the desired note information.
16. Touch the Save button to save the entry, or the Cancel button to discard.

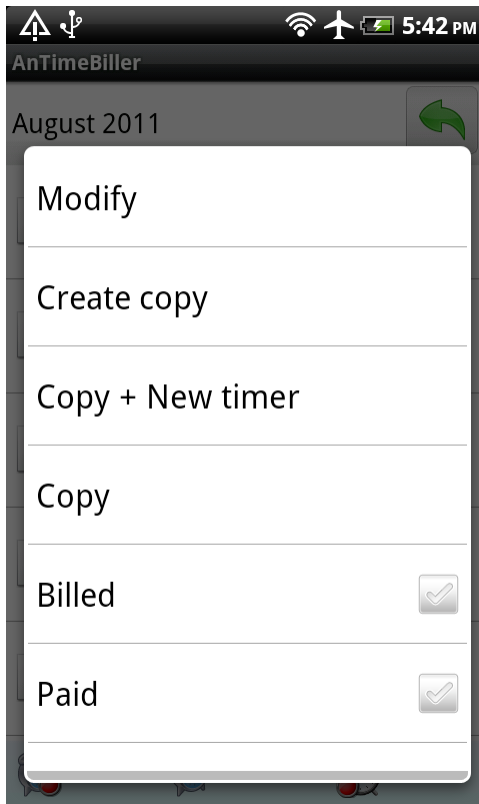
Mileage Expense

The screenshot shows the 'AnTimeBiller' app interface. At the top, there's a status bar with icons for home, back, Wi-Fi, airplane mode, and battery, along with the time '5:25 PM'. Below the app title, the form is organized as follows:

- Date:** A button labeled 'Friday, Sep 2 2011'.
- Description:** An empty text input field with a green border.
- Client:** A dropdown menu showing 'Acme Co.' with a downward arrow.
- Project:** A dropdown menu showing 'Project A' with a checked checkbox to its left and a downward arrow.
- Status:** A dropdown menu showing 'Billable' with a downward arrow.
- Start odometer:** A text input field containing '0'.
- End odometer:** A text input field containing '0'.
- Distance:** A text input field containing '0'.
- Currency:** A text input field containing 'CAD'.

1. From main screen, press the Menu key and select Expenses.
2. Press the Menu key and select New mileage.
3. Select a date for the entry. The default is today.
4. Enter a description.
5. Select a client.
6. (Optional) Check the check box under Project to select a project.
7. (Optional) Select a status.
8. (Optional) Enter the odometer readings or distance.
9. (Optional) Enter a currency.
10. (Optional) Enter a rate.
11. (Optional) Check the Receipt supplied check box.
12. (Optional) Select a contact for bill to.
13. (Optional for paid entry only) Touch the Set button to enter a custom paid date.
14. (Optional) Enter a description for each custom field.
15. (Optional) Enter the desired note information.
16. Touch the Save button to save the entry, or the Cancel button to discard.

Modify an Entry



Touch and hold on the entry to display the context menu.

- Modify – to edit the entry
- Create copy – to create a copy of the entry
- Copy + New timer – to create a new timer based on the entry
- Copy – to duplicate the entry for the rest of the week, to a specified date or end date
- Billed – to check/uncheck the entry as billable/billed
- Paid – to check/uncheck the entry as paid/unpaid
- Delete – to delete the entry

Copy an Entry

Copy entry to:

the following date ▼

Tuesday, Aug 30 2011

Include weekend(s)

Duration:

+	+
01	00
-	-

Save Cancel

To duplicate repetitive entries for the rest of the week, to a specified date or end date, and modify the duration for the copies:

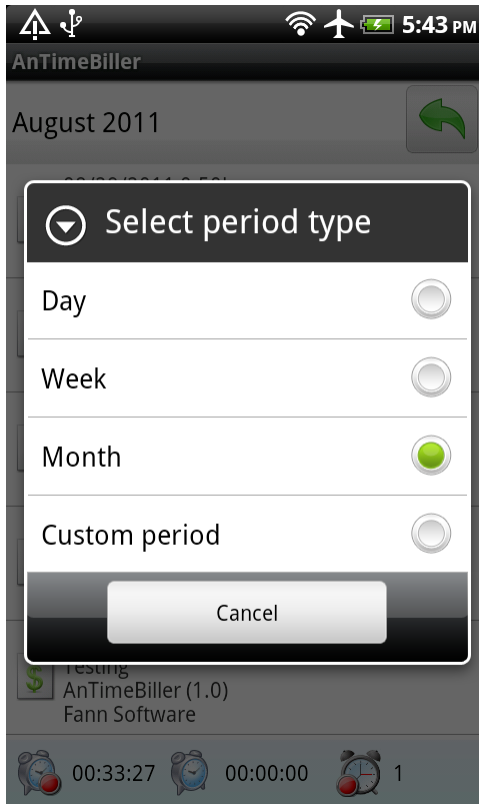
1. Touch and hold on the entry.
2. Select Copy.
3. Select the desired option(s).
4. Change the duration if desired.
5. Touch the Save button.

Customize Main View

There are 2 main components that can be customized on main view:

- Date range
- Data filter

Date Range



From main screen, press the Menu key and select Period type to display data by day, week, month, or a custom period.

To change a custom period, press the Menu key and select Set period.

Data Filter

Client: Acme Co.

Project: (All)

Phase: (All)

Task: (All)

Bill to: (All)

Unpaid

Billed

OK Cancel

Use filter to limit the amount of displayed data:

1. From main screen, press the Menu key and select More→Filter→Set filter.
2. Select the desired criteria.
3. Touch the OK button.

Options

Press the Menu key and select More→Options to change options.

General – View

Field	Description
Week starts on Monday	Select Monday or Sunday as start of the week
Show week number (Week view only)	Show week number on the date bar in week view

General – CSV export

Field	Description
Replace line break with	Select the line break option for notes in CSV export

General – Report

Field	Description
Owner information for invoice	Information used on invoice

Entry defaults – Defaults

Field	Description
Billable	Set new entry as billable
Currency	Set the default currency for new entry
Duration granularity	Enable automatically update of the duration to the next interval
Granularity interval	Set the granularity interval

Timer – Break time

Field	Description
Set break time	Select the break time calculation method

Timer – General

Field	Description
Exit timer confirmation	Enable the feature to prompt before closing AnTimeBiller

Custom fields – Entry

There are 3 custom fields for adding data to each time entry.

Custom fields – Expense

There are 2 custom fields for adding data to each expense entry.

Data

Clean database feature.

Display Summary Statistics

From main screen or expense screen, press the Menu key and select Quick summary to display the summary statistics for the currently displayed period.

Display Client Summary

1. From main screen, press the Menu key and select More→Client summary.
2. Select a client.
3. (Optional) Check the check box under Project to select a project.
4. (Optional) Check the check box under Task to select a task.
5. Touch the Show summary button.

Create a Report

3 types of reports can be created: invoice, tabular, or group by.

To create a report:

1. From main screen, press the Menu key and select More→Report→Invoice report/Tabular report/Group by report/Load report.
2. Touch the item to change an option and enter the desired information.

The screenshot shows the 'AnTimeBiller' application interface for creating a report. At the top, the status bar shows the time as 5:24 PM. Below the title bar, the 'Report title:' field contains the text 'AnTimeBiller Group By Report'. The 'Date range:' field is currently set to 'Date range'. The 'Group by:' field is set to 'Client'. Under 'Report fields:', three items are listed: 'Entry date', 'Client', and 'Project', each with a checked checkbox and a drag handle icon. At the bottom, there are 'OK' and 'Cancel' buttons.

3. For Report fields, check the check box to select the items to be displayed, touch and hold the drag handle (☰) to alter the display order on the report.
4. (Optional) Save custom report by press the Menu key and select Save report, enter a name and touch the OK button.
5. Touch the OK button to continue.

6. In the Criteria screen, select the criteria to report on.

Start date:
Monday, Aug 1 2011

End date:
Wednesday, Aug 31 2011

Client:
(All)

Project:
(All)

Phase:
(All)

Task:
(All)

OK Cancel

7. Touch the OK button to continue.
8. Enter a filename for the report output. It will be saved as a HTML file.
9. Touch the OK button to continue.
10. Touch the Preview button to display the report, or the Send email button to send the report as an attachment.

Create an Expense Report

1. From main screen, press the Menu key and select Expenses.
2. Press the Menu key and select More→Report→Mileage report/General expense report/Load report.
3. Touch the item to change an option and enter the desired information.

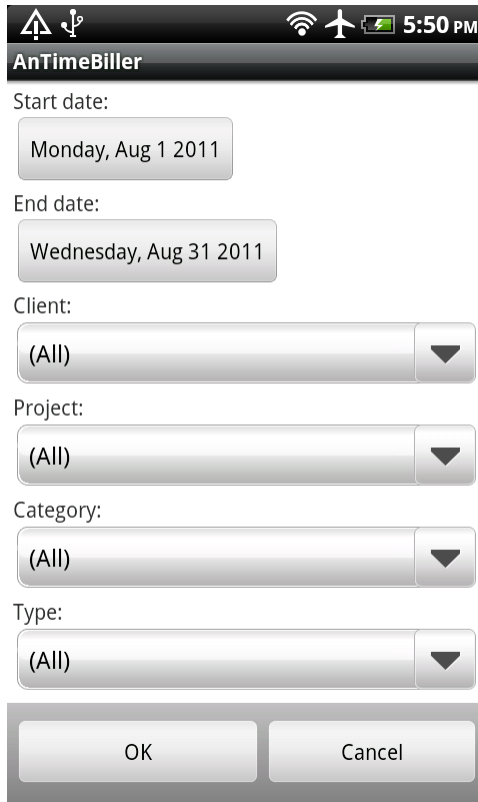
The screenshot shows the 'AnTimeBiller' app interface. At the top, there's a status bar with signal, Wi-Fi, airplane mode, and battery icons, and the time '5:49 PM'. Below the app title, the 'Report title:' field contains 'Mileage Expense Report'. The 'Report date:' field shows 'Friday, Sep 2 2011'. Under 'Report fields:', there are five items: 'Entry date', 'Description', 'Client', 'Project', and 'Start'. Each item has a green checkmark in a box and a three-line drag handle icon to its right. At the bottom of the form, there are two buttons: 'OK' and 'Cancel'.

4. For Report fields, check the check box to select the items to be displayed, touch and hold the drag handle (☰) to alter the display order on the report.
5. (Optional) Save custom report by press the Menu key and select Save report, enter a name and touch the OK button.
6. Touch the OK button to continue.
7. In the Criteria screen, select the criteria to report on.
8. Touch the OK button to continue.
9. Enter a filename for the report output. It will be saved as a HTML file.
10. Touch the OK button to continue.
11. Touch the Preview button to display the report, or the Send email button to send the report as an attachment.

Mark Time and Expense Entries

To mark time entries:

1. From main screen, press the Menu key and select More→Data→Mark billed entries/Mark paid entries.
2. Select the desired criteria.



The screenshot shows the AnTimeBiller application interface. At the top, there is a status bar with icons for signal strength, Wi-Fi, airplane mode, and battery, along with the time 5:50 PM. Below the status bar is the application title "AnTimeBiller". The main area contains several input fields for selecting criteria:

- Start date: Monday, Aug 1 2011
- End date: Wednesday, Aug 31 2011
- Client: (All)
- Project: (All)
- Category: (All)
- Type: (All)

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

3. Touch the OK button.
4. (Optional for Mark paid entries only) Select a desired paid date.
5. (Optional for Mark paid entries only) Touch the OK button.

To mark expense entries:

1. From main screen, press the Menu key and select Expenses.
2. Press the Menu key and select More→Data→Mark billed entries/Mark paid entries.
3. Select the desired criteria.
4. Touch the OK button.
5. (Optional for Mark paid entries only) Select a desired paid date.
6. (Optional for Mark paid entries only) Touch the OK button.

Note: Only billable entries can be billed or paid.

A quick way to mark or unmark a single entry is to use the context menu by touch and hold on the entry.

Export Data

AnTimeBiller supports Comma Separated Values (CSV) format.

To export time entries:

1. From main screen, press the Menu key and select More→Data→Export CSV.
2. Select the desired criteria.
3. Touch the OK button to continue.
4. Enter a filename.
5. Touch the OK button to continue.
6. Touch the OK button, or the Send email button to send the file as an attachment.

To export expense entries:

1. From main screen, press the Menu key and select Expenses.
2. Press the Menu key and select More→Data→Export CSV.
3. Select the desired criteria.
4. Touch the OK button to continue.
5. Enter a filename.
6. Touch the OK button to continue.
7. Touch the OK button, or the Send email button to send the file as an attachment.

Backup and Restore

It is important to backup your data regularly. Backup will store all time entries, expense entries, client structures, rates, report definitions, and preferences to a file. It can be used if your device failed or a hard-reset is required.

To create a backup file:

1. From main screen, press the Menu key and select More→Data→Create backup.
2. Enter a filename.
3. Touch the OK button.

To restore from a backup:

1. From main screen, press the Menu key and select More→Data→Restore backup.
2. Select a backup file to restore.

Set Defaults

Press the Menu key and select More→Options→Entry defaults to set default values for new entries.

Edit Drop Lists

1. From main screen, press the Menu key and select More→Data→Manage drop lists.
2. Select the list type.
3. To remove an item, check the check box, press the Menu key and select Delete.
4. To remove all items, press the Menu key and select Delete all.

Archive Data

1. (Recommended) Create a backup file.
2. From main screen, press the Menu key and select More→Data→Create archive.
3. Select a start and end date.
4. (Optional) Check "Delete after archived" to delete the data once it is archived.
5. Touch the OK button to continue.
6. Enter a filename. A descriptive name is recommended.
7. Touch the OK button.

To reload archived data back into AnTimeBiller, press the Menu key and select More→Data→Load archive from main screen, select the desired tbax file.

Note: Use TimeBiller Archive Viewer (available at Product Support page) to view archived time and expense entries on desktop PC.

Custom Fields

There are 3 custom fields for adding data to each time entry and 2 custom fields for adding data to each expense entry.

To change the default descriptions:

1. Press the Menu key and select More→Options→Custom fields.
2. Select the desired field to edit.
3. Enter a description.
4. Touch the OK button.