



Fann Software TimeBiller

Users' Guide

Version 3.1

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<http://www.fannsoftware.com>
support@fannsoftware.com

Overview	1
Using TimeBiller	2
Main Screen	2
Help File	3
Setup Clients.....	3
Setup Rates	5
Rate Types	6
Create an Entry	7
General tab.....	7
Billing tab.....	8
Custom tab.....	9
Note tab.....	9
Create an Entry Using a Timer	10
Create an Expense Entry	12
Modify an Entry	12
Using Context Menu.....	13
Delete an Entry	13
Copy an Entry	14
Customize Main View.....	14
Date Range	15
Information Display	15
Data Filter	17
Sort Order.....	18
List Style.....	18
Options.....	19
View – Main View Options	19
General – Special Options	19
Defaults – New Entry Defaults	19
Timer – Options	20
Export – XML Export.....	20
Export – CSV Export.....	20
Custom Fields 1.....	20
Custom Fields 2.....	20
Display Summary Statistics	20
Display Client Summary	21
Create a Report.....	21
Create an Expense Report.....	22
Mark Time and Expense Entries.....	24
Export Data	25
Backup and Restore.....	25
Set Defaults	26
Edit Drop Lists.....	26
Export Note from an Entry	26
Archive Data	27
Custom Fields	27
Replace Field Text	28

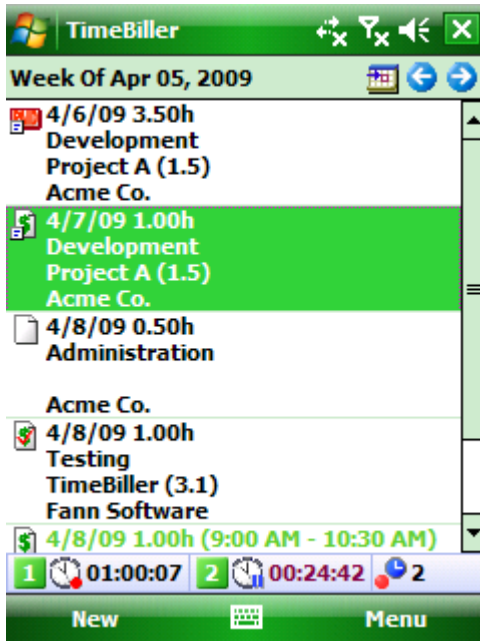
Overview

TimeBiller is a time and billing tracking program. It is designed to work similar to a timesheet application in a typical work environment. 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
- Customizable view with sort, filter, font size, and colour options
- Display entries by day, week, month, or a custom period
- Optional duration granularity (minimum duration interval) and break time
- Multiple views of data
- 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 or XML for further analysis
- Drop lists for efficient data entry
- Optional pre-filled drop lists
- Create entries using multiple timers
- Custom fields for time entry and expense
- Support ClearType
- Support VGA, square screen, and landscape mode
- Synchronization with Desktop TimeBiller using ActiveSync

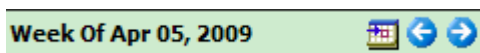
Using TimeBiller

Main Screen

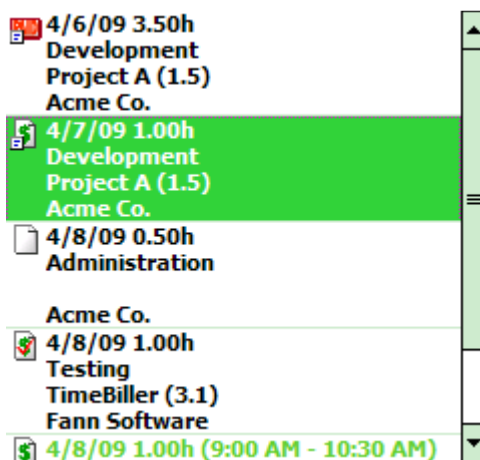


Main screen is divided into 4 panes.

The area right below the navigation bar displays the date selection on the left and navigation buttons on the right:



- Tap on the date selection to select a different date using a calendar display
- Tap on the Goto Today, Previous and Next buttons to change date



The middle section lists the time entries (if any) for the current filter and date selection. You can customize the display to suit your needs.

- Tap and hold on an entry to display the context menu for more options



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

The bottom command bar displays two soft keys:



- New soft key: Create a new time entry.
- Menu soft key: General commands.

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

Setup clients before entering their rates. To setup clients, tap Menu→Setup→Clients....

To enter the rates, tap Menu→Setup→Rates....

Help File

To access the help file, tap Start Menu→Help.

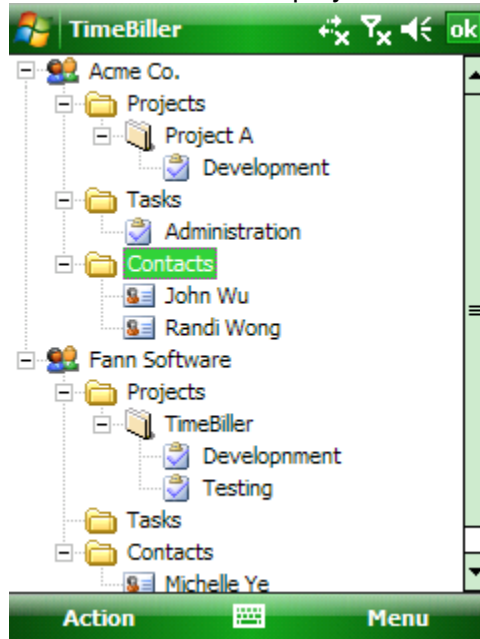
Setup Clients

This step is optional. However, if you already have a list of projects and associated tasks, you can create the 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 a project.
- A contact is associated to a client.

To create a structure:

1. From main screen, tap Menu→Setup→Clients....
2. A similar screen is displayed:



3. Tap the client you want to add a project, task, or contact.
4. Tap Action→Add Client.../Project.../Task.../Contact....
5. Enter the name of the item and tap Ok.
6. The new item is displayed under the appropriate folder.
7. Repeat step 3 to 6 until you are done.
8. Tap Ok.

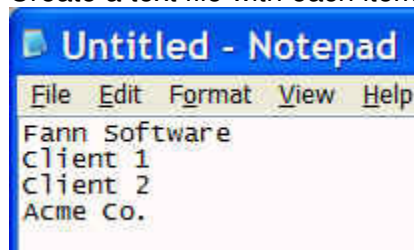
To create a task for a project:

1. Tap the project you want to add a task.
2. Tap Action→Add Task....
3. Enter the task name and tap Ok.
4. The new task is displayed under the originally selected project.

You can import a list from a text file, or import contacts from Outlook on the device.

To import a text file:

1. Create a text file with each item on its own line, i.e.:



2. Copy the text file onto \My Documents directory on your device using Windows Explorer.
3. From main screen, select Menu→Setup→Clients....
4. Select the client that associates with the source file (if you are importing clients, select any client will do), tap Menu→Import....
5. Select a type from the screen.



Select the type to import:

- Clients
- Projects for a selected client
- Tasks for a selected client or project
- Contacts (Bill To) for a selected client
- Import a contact from Contacts Application
- Import a client structure file



6. Tap Ok to continue.
7. Select the source file to import.
8. The imported items are displayed.






To import a client structure file created by Desktop TimeBiller:

1. From main screen, tap Menu→Setup→Clients....
2. Tap Menu→Import....
3. Select "Import a client structure file".
4. Tap Ok to continue.
5. Select the source file to import.
6. Tap Yes/No to confirm whether to delete the existing client structure.
7. The imported items are displayed.

Setup Rates

You can setup multiple rates for each client, or use the default rates which are available to all clients.

Rate Types

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

You should create at least the normal rate under the (Default Rates) structure.

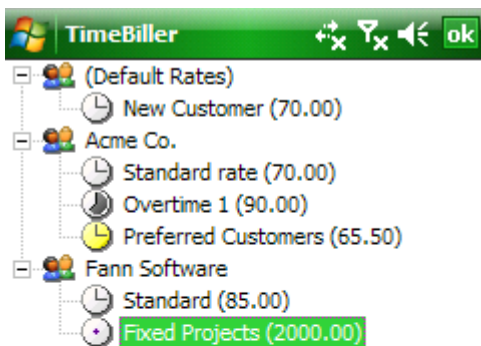
Note:

- **Any modification of rates does not change the rates used in existing time entries.**

To setup rates:

1. From main screen, tap Menu→Setup→Rates....
2. The list of rates grouped by clients is displayed, the first group is the default rates.
3. See below for steps to create, edit, or remove rates.
4. Tap Ok to return to main screen.

To create a rate:



1. Tap on the (Default Rates) group or client.

2. Tap New to open the rate edit screen.
3. Select a rate type.
4. Enter a description (it is a required field).
5. Enter a rate with up to 2 decimal places, e.g. 75.5 or 80.
6. Tap Ok.

To edit a rate:

1. Tap on the rate to edit.
2. Tap Menu→Modify... to open the rate edit screen.
3. Make the necessary changes.
4. Tap Ok.

To delete a rate:

1. Tap on the rate to delete.
2. Tap Menu→Delete to remove.

Create an Entry

General tab

The screenshot shows the 'TimeBiller' application interface. At the top, there is a green header bar with the Windows logo, the text 'TimeBiller', and several icons including a plus sign, a minus sign, a magnifying glass, a speaker, and an 'ok' button. Below the header, the form contains the following fields:

- Date:** A dropdown menu showing 'Wednesday, April 08, 2009'.
- Client:** A dropdown menu.
- Project:** A dropdown menu.
- Phase:** A dropdown menu.
- Task:** A dropdown menu.
- Duration:** A dropdown menu showing '0.00' followed by the text 'hour(s)'.
- Start:** A time selection field showing '4:52PM' with up and down arrow icons.

At the bottom of the form, there is a row of four tabs: 'General', 'Billing', 'Custom', and 'Note'. Below the tabs is a green bar containing a 'Cancel' button, a keyboard icon, and a 'Set Time' button.

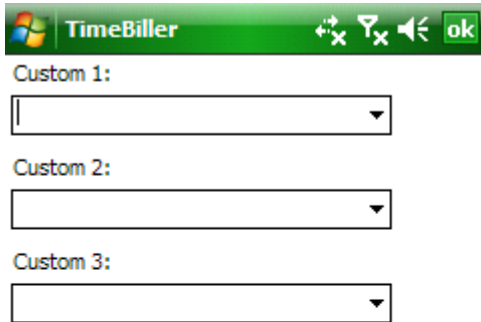
1. From main screen, tap New in the command bar.
2. Select a **Date** for the entry. The default is today.
3. Enter/Select a **Client** name. If you have setup a structure for the client, the Project and Task drop lists will load only the items that are associated with the client. Otherwise, all items are shown.

4. (Optional) Enter/Select a **Project** name.
5. (Optional) Enter/Select a **Phase** of the project.
6. Enter/Select a **Task** name.
7. Enter/Select a **Duration** in hours, or tap the Set Time soft key to enter a start, break, and/or end time.
8. (Optional) Check the check box on **Start** to enter a start time.
9. Tap on other tabs to enter additional information (see below for steps).
10. Tap Ok to save the entry, or Cancel on the General tab to discard.

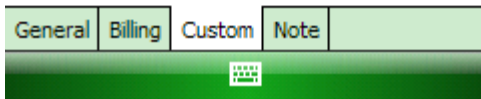
Billing tab

1. Select a **Status** for the entry.
2. (Optional) Enter/Select a **Bill To** contact.
3. From the list of rates, select a rate for the entry.
 - To manually enter a rate, select (**Custom Rate**) and enter a rate in the rate edit box
 - Check the **Fixed** check box to indicate a fixed rate, tap **Calculate** to preview the total
4. (Optional) Enter/Select a currency for the rate. A default can be setup in the Options dialog box (main screen→Menu→Options...→Defaults tab).
5. Tap on another tab to enter additional information if desired.
6. Tap Ok to save the entry at any time.

Custom tab

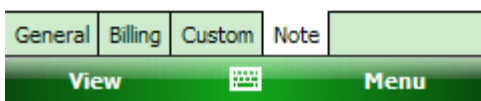


The screenshot shows the 'TimeBiller' application window with a green title bar. Below the title bar, there are three custom fields labeled 'Custom 1:', 'Custom 2:', and 'Custom 3:'. Each field is represented by a white rectangular box with a small downward-pointing arrow on the right side, indicating a dropdown menu.



1. The title of each custom field can be customized in the Options dialog box.
2. Tap on another tab to enter additional information if desired.
3. Tap Ok to save the entry at any time.

Note tab



1. Type, or draw note. To draw, tap Menu→Writing Mode and use the stylus to draw on the screen.
2. Option to edit the note using Word Mobile (see below for steps).
3. Tap on another tab to enter additional information if desired.
4. Tap Ok to save the entry at any time.

To edit note using Word Mobile:

1. Tap Menu→Edit in Word Mobile.
2. Word Mobile will open with the current content of the note.
3. Edit the note.
4. Tap Ok to return to TimeBiller.
 - If you are in the file selection screen in Word Mobile, enter Ctrl+q using the keyboard input panel, or tap on TimeBiller icon from the Start Menu to return to TimeBiller.
5. Tap Ok to update the Note screen.

Note:

- **Word Mobile on Windows Mobile 5.0 does NOT support editing drawings and recordings.**
- TimeBiller remembers every text field entry and it will be available in the drop list next time you create a new item.
- Note with large voice recording is not supported.

Create an Entry Using a Timer

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

TimeBiller			
Duration	Break	Start	Client
00:53:32	00:00:00	4:00 PM	Fann S
01:35:14	00:18:07	3:00 PM	Acme C

◀ ||| ▶

Note here

Timer [Keyboard Icon] Menu

1. From main screen, tap Menu→Timers... to open the timer screen.
2. Tap Timer→Add Timer... to begin time recording for a task.
3. (Optional) Enter/Select a client name.
4. (Optional) Enter/Select a project name.
5. (Optional) Enter/Select a phase.
6. (Optional) Enter/Select a task name.
7. (Optional) Check the check box on Start Time to enter a start time.
8. Tap Ok to return to the timer screen.
9. Tap Timer→Pause to pause for breaks, and uncheck Pause to resume recording.
10. You can enter note while the timer is running.
11. Tap Timer→Complete Timer... when finished to create the time entry, or Timer→Cancel Timer to cancel the recording.
12. Duration (converted to hours) is entered and note is updated from the timer screen automatically.
13. Enter the appropriate information in the entry screen.
14. Tap Ok to save the entry.

Note:

- To run multiple timers, tap Timer→Add Timer... and follow the same procedure.
- To edit the timer or the break time, tap Timer→Edit....
- The Timers menu item will show the number of timers running.
- 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 TimeBiller while the timer is running, otherwise all timer information will be lost. To set timer option for warning before exit, tap Menu→Options...→General tab.
- Note with large voice recording is not supported.

Create an Expense Entry

TimeBiller

Date: Wednesday, April 08, 2009

Description:

Client:

Project:

TimeBiller

Date: Wednesday, April 08, 2009

Description:

Client:

Project:

Category:

General Expense Custom Note

Cancel

General Expense Custom Note

Cancel

1. From main screen, tap Menu→Expenses....
2. Tap New→Mileage Expense.../General Expense....
3. Select a date for the entry. The default is today.
4. Enter/Select a description.
5. Enter/Select a client name. If you have setup a structure for the client, the Project drop lists will load only the items that are associated with the client. Otherwise, all items are shown.
6. (Optional) Enter/Select a project name.
7. (Optional) Enter/Select a category.
8. Tap on the Expense tab to enter additional information.
9. (Optional) Tap on the Custom tab to enter information for custom fields.
10. (Optional) Tap on the Note tab to enter additional information.
11. Tap Ok to save the entry, or Cancel on the General tab to discard.

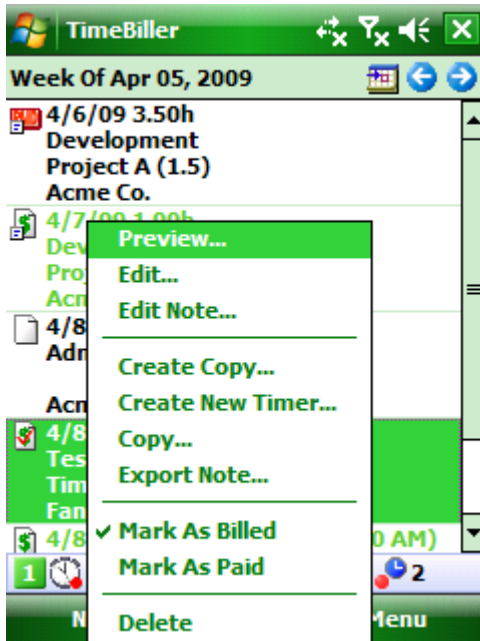
Note:

- Expense note supports text only and is limited to 512 characters.

Modify an Entry

Tap the entry. If the entry is not in the list, change the date selection criteria to display the entry.

Using Context Menu



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

- Preview... to display a quick summary of the entry
- Edit... to edit the entry
- Edit Note... to edit the note
- Create Copy... to create a copy of the entry
- Create 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
- Export Note... to export the note to one of the following formats: Word Mobile, Pocket Notes, Rich Text, ASCII Text, or Unicode Text
- Mark As Billed to check/uncheck the entry as billable/billed
- Mark As Paid to check/uncheck the entry as paid/unpaid
- Delete to permanently delete the entry

Delete an Entry

1. Tap and hold on the entry.
2. Select Delete.
3. Tap Yes to confirm.

Copy an Entry

TimeBiller

Copy Entry

Copy entry to:

Date: 4 / 8 /09

Rest of the week

Specific end date: 4 / 8 /09

Include weekend

Duration: 1.00 h

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:

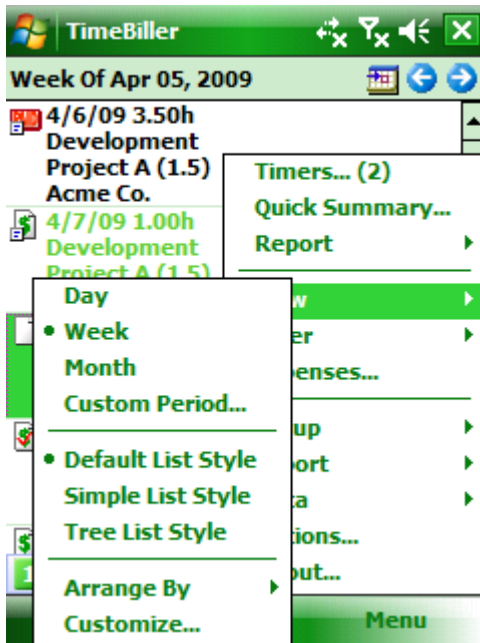
1. Tap and hold on the entry.
2. Select Copy....
3. Select the desired option(s).
4. Change the duration if desired.
5. Tap Ok.

Customize Main View

There are 5 main components that can be customized on main view:

- Date range
- Information display
- Data filter
- Sort order
- List style

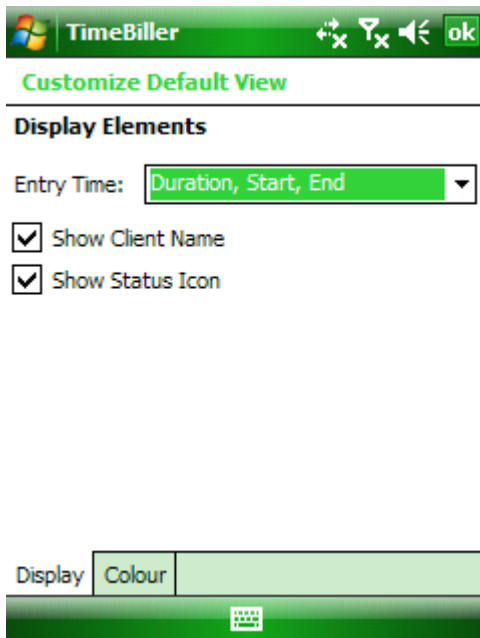
Date Range



From main screen, tap Menu→View and select to display data by day, week, month or a custom period, or use the toolbar buttons (see also Main Screen) to move to a different date other than the custom period.

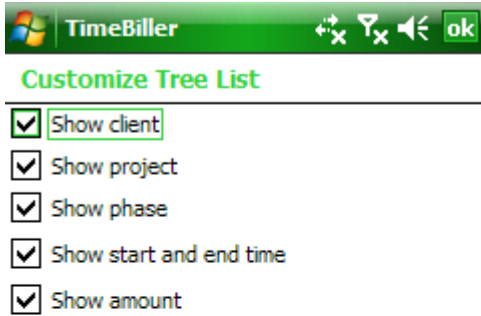
Information Display

Change the way a time entry is displayed in the view to suit your needs.



For default view:

1. From main screen, tap Menu→View→Customize....
2. In the Display tab, select the desired options.
3. In the Colour tab, customize the colour of text for the different status of entries (Non Billable, Billable, Billed, or Paid).
4. Tap Ok.



For tree list view:

1. From main screen, tap Menu→View→Customize....
2. Select the desired options.
3. Tap Ok.

Data Filter

TimeBiller

Client: (All)

Project: (All)

Phase: (All)

Bill To: (All)

Unpaid Billed Paid

Non Billable

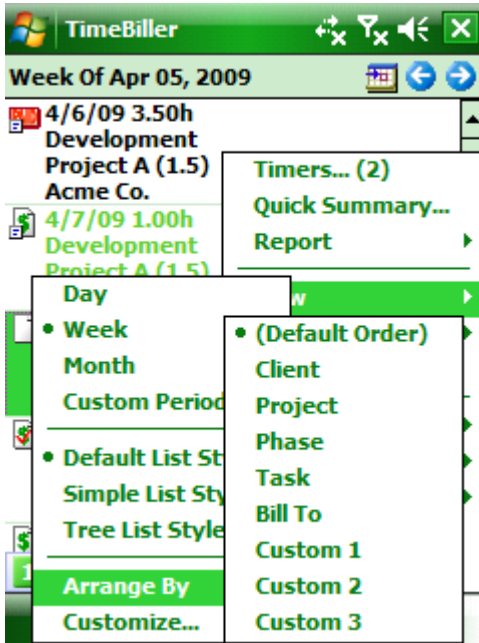
Filter More Choices

Clear Cancel

Use filter to limit the amount of displayed data (Show All, Show Unpaid Only, or Custom...):

1. From main screen, tap Menu→View→Filter and select the desired option, or
2. Tap Custom... to create custom filter.
3. Select the desired fields.
4. Tap Ok.

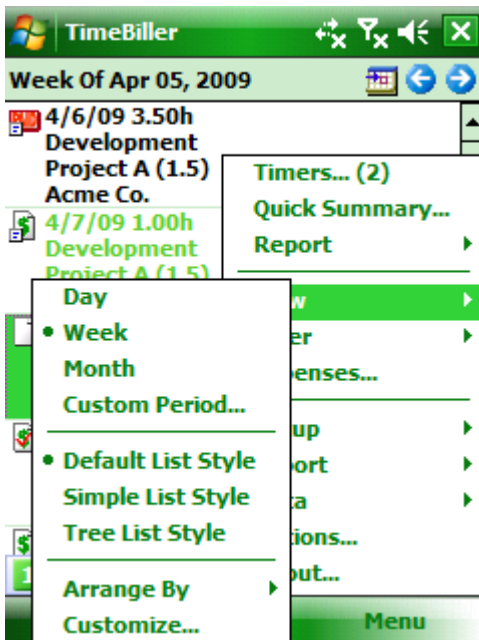
Sort Order



From main screen, tap Menu→View→Arrange By and select to sort data by one of the fields.

- The (Default Order) sorts by date and start time (if exists).
- Other orders will sort by the selected field first, then by the Default Order.

List Style



From main screen, tap Menu→View and select default, simple, or tree list view.

Options

From main screen, tap Menu→Options... to change options.

View – Main View Options

Field	Description
Week start	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
Font size and bold	Select the size and style of the font for display
Item tap option	Select the action for tapping on an item
Use soft key menus	Use soft key menu style on Windows Mobile 5.0 or later

General – Special Options

Field	Description
Enable precise calculations for minutes 10, 20, 40, and 50	Prevent rounding error in calculations for those intervals
Duration interval	Set the interval used to populate the duration drop list

Defaults – New Entry Defaults

Field	Description
Billable	Set new entry as billable
Currency	Set the default currency for new entry
Enable duration granularity of x minutes	Automatically update the duration to the next interval

Timer – Options

Field	Description
Prompt before close if timers are running	Enable the feature to prompt before closing TimeBiller
Vibrate when starting/pausing timer	Enable the vibration feedback (if available)
Set break time	Select the break time calculation method

Export – XML Export

Field	Description
Encoding	Select the encoding option for XML export

Export – CSV Export

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

Custom Fields 1

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

Custom Fields 2

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

Display Summary Statistics

From main screen, tap Menu→Quick Summary... to display the summary statistics for currently displayed entries.

Display Client Summary

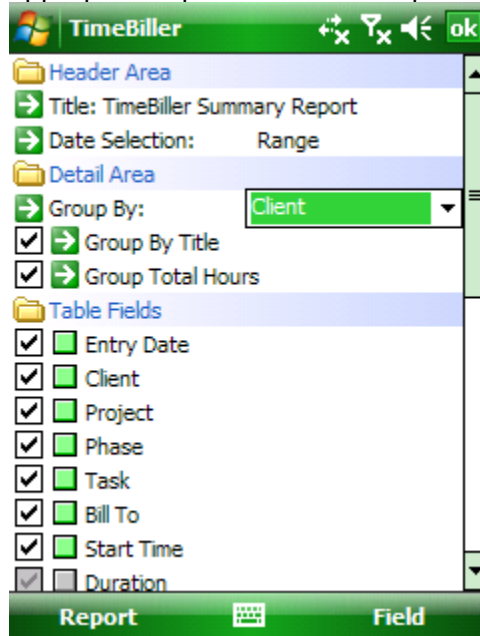
1. From main screen, tap Menu→Data→Client Summary....
2. Select a client.
3. (Optional) Select a project.
4. (Optional) Select a task.
5. Tap Ok.

Create a Report

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

To create a report:

1. From main screen, tap Menu→ Report and select the desired report type.
2. (Optional) Tap Report→Load to select either a default or saved report.
3. For Header and Detail Areas, tap on the item to change an option, select the appropriate option from the drop list and type in the desired title.



4. For Table Fields items, check the check box to select the items to be displayed, use the Up or Down button to alter the display order on the report. Duration is a required field which has a grey icon.
5. For Footer Area, check the check box to select the items to be displayed.
6. (Optional) Save custom report by selecting Report→Save..., enter a name and tap Ok.
7. Tap Ok to continue.

- In the Criteria screen, select the criteria to report on. You must select a start and end date at the least.

TimeBiller

Start: Sunday , April 05, 2009

End: Saturday , April 11, 2009

Client: (All)

Project: (All)

Phase: (All)

Task: (All)

Bill To: (All)

Unpaid Billed Paid

Non Billable

Criteria More Choices

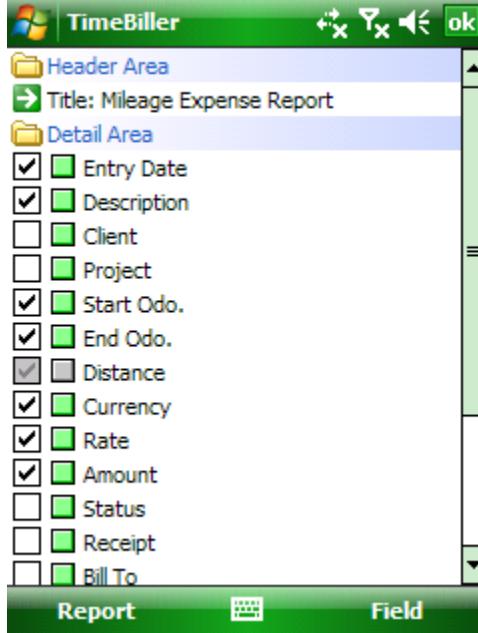
Clear Cancel

- Tap Ok to continue.
- Enter a filename for the report output. It will be saved as a HTML file.
- Tap Save to continue.
- The generated report is displayed using Pocket Internet Explorer.

Create an Expense Report

- From main screen, tap Menu→Expenses....
- Tap Menu→Report→Mileage Expense.../General Expense....
- (Optional) Tap Report→Load to select either a default or saved report.

4. For Header and Detail Areas, tap on the item to change an option, select the appropriate option from the drop list and type in the desired title.



5. Check the check box to select the items to be displayed, use the Up or Down button to alter the display order on the report.
6. (Optional) Save custom report by selecting Report→Save..., enter a name and tap Ok.
7. Tap Ok to continue.
8. In the Criteria screen, select the criteria to report on. You must select a start and end date at the least.
9. Tap Ok to continue.
10. Enter a filename for the report output. It will be saved as a HTML file.
11. Tap Save to continue.
12. The generated report is displayed using Pocket Internet Explorer.

Mark Time and Expense Entries

To mark time entries:

1. From main screen, tap Menu→Data→Mark Billed Entries.../Mark Paid Entries....
2. Select the desired criteria.

TimeBiller

Start: Sunday , April 05, 2009

End: Saturday , April 11, 2009

Client: (All)

Project: (All)

Phase: (All)

Task: (All)

Bill To: (All)

Unpaid Billed Paid
 Non Billable

Criteria More Choices

Clear Cancel

3. Tap Ok.
4. (Optional for Mark Paid Entries only) Select a desired paid date.
5. Tap Ok.

To mark expense entries:

1. From main screen, tap Menu→Expenses....
2. Tap Menu→Mark Billed Entries.../Mark Paid Entries....
3. Select the desired criteria.
4. Tap Ok.
5. (Optional for Mark Paid Entries only) Select a desired paid date.
6. Tap Ok.

Note:

- Only billable entries can be billed or paid.
- Paid entries are ignored.

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

Export Data

TimeBiller supports the following formats:

- Comma Separated Values (CSV) - used by Excel, Lotus 1-2-3 etc.
- XML - used by XML enabled applications

To export time entries from TimeBiller to use in other applications such as Excel, custom billing applications, or other enterprise applications:

1. From main screen, tap Menu→Export→CSV.../XML....
2. Select the desired criteria.
3. Tap Ok to continue.
4. Enter a filename and select a location.
5. Tap Save.

To export expenses:

1. From main screen, tap Menu→Expenses....
2. Tap Menu→Export→Mileage Expense CSV.../General Expense CSV....
3. Select the desired criteria.
4. Tap Ok to continue.
5. Enter a filename and select a location.
6. Tap Save.

Note:

- The default attribute is no encoding. To specify XML encoding, tap Menu→Options...→Export tab.
- CSV format is suited best for Excel or database imports.
- The generated XML is well-formed.
- Note data is exported in XML export. All non-text contents are not exported.

Backup and Restore

It is important to backup your data regularly and save it on your desktop computer or CF card. Backup will store all time entries, expenses, client structures, and rates 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, tap Menu→Data→Create Backup....
2. Enter a filename and select a location (please make sure the location has enough space).
3. Tap Save.

To restore from a backup:

1. From main screen, tap Menu→Data→Restore Backup....

2. Select a backup file to restore.
3. Confirm whether to delete all data before the restore.

Note:

- It is recommended that the device is connected to AC power before the backup process.
- If TimeBiller already contains data, a restore will append the backup data to the existing data.

Set Defaults

From main screen, tap Menu→Options...→Defaults tab to set default values for new entries.

Edit Drop Lists

1. From main screen, tap Menu→Data→Edit Drop Lists....
2. Select the list type.
3. To remove an item, select it and tap Delete.
4. To remove all items, tap List→Delete All.
5. To add items, tap List→Import... and select a text file to import.
6. Tap Ok.

Note:

- Each item in the text file is separated by a new line.

Export Note from an Entry

1. Tap and hold on the entry.
2. Select Export Note....
3. Enter a filename and select the appropriate file type and location.
4. Tap Save.

Note:

- Drawing, writing, and recording are not exported if you select any type other than Word Mobile or Pocket Notes.
- Pocket Notes files will be synchronized into desktop Outlook.
- Word Mobile files copied to the desktop will be converted to Word format.

Archive Data

Archive old and unused data to an external file to save valuable storage space on the device.

1. (Recommended) Create a backup file.
2. From main screen, tap Menu→Data→Archive Entries....
3. Select a start and end date.
4. Check "Delete when archived" to delete the data once it is archived.
5. Tap Ok to continue.
6. Enter a filename and select a location. A descriptive name is recommended.
7. Tap Save.

To reload archived time entries back into TimeBiller, tap Menu→Data→Load Archive... from main screen.

Note:

- Use TimeBiller Archive Viewer (available at Product Support page) to view archived time and expense entries.
- Drop list entries are preserved. To delete them, see Edit Drop Lists.

Custom Fields

There are 3 custom fields on the Custom tab for adding data to each entry.

To change the default descriptions:

1. From main screen, tap Menu→Options....
2. Select the Custom Fields 1 tab.
3. Enter a description for each field.
4. Tap Ok.

There are 2 custom fields on the Custom tab for adding data to each expense.

To change the default descriptions:

1. From main screen, tap Menu→Options....
2. Select the Custom Fields 2 tab.
3. Enter a description for each field.
4. Tap Ok.

Replace Field Text

1. From main screen, tap Menu→Data→Replace Field Text....
2. Select the type.
3. Select an item from the Find drop list.
4. Enter the replacement text in the entry bar under Replace With.
5. Tap Ok to search and replace the text in all entries.