Fann Software AnTimeBiller

Users' Guide (Tablet)

Version 1.3

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

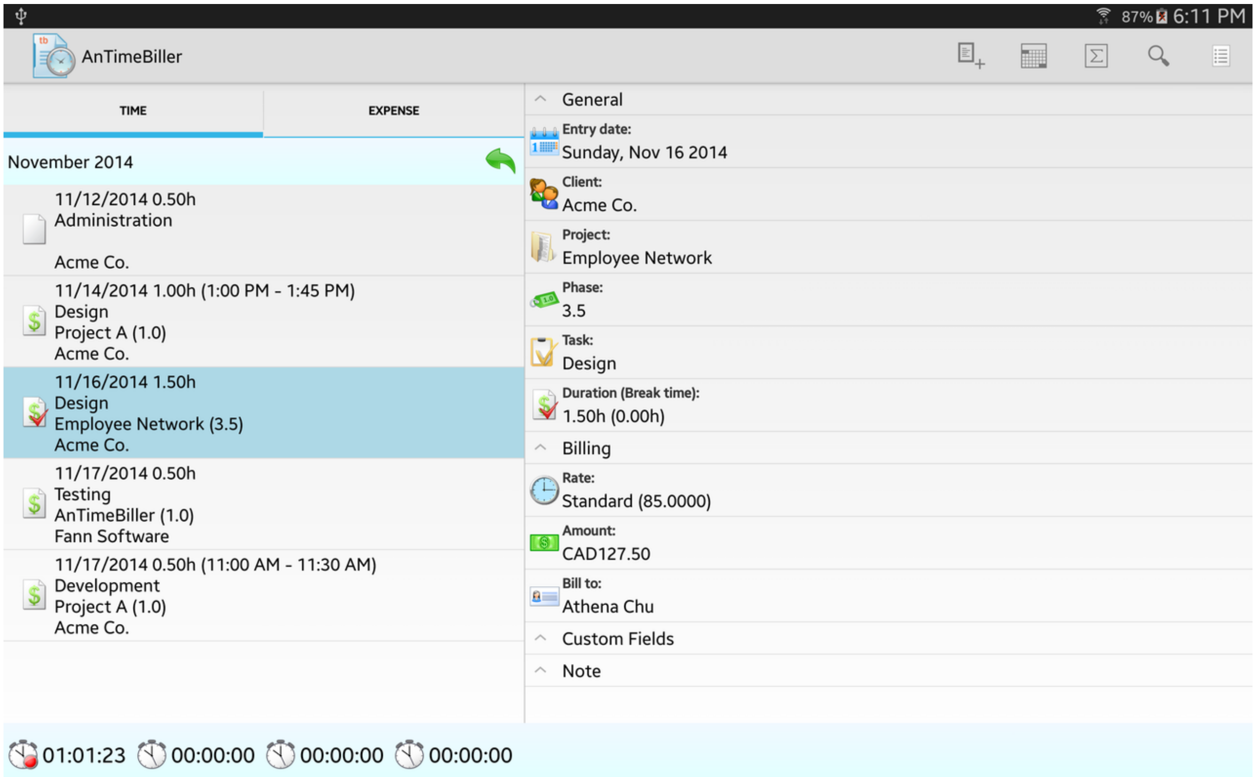
Overview

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 Action Bar on the top consists of time entry tab, expense entry tab, and action items.

The timer status bar at the bottom can display up to 4 timers depending on the device. Touch a running timer to display the context menu for options.

The main screen is divided into 2 panes.

Left Pane:

The date bar displays the date selection and the Today button. Touch on the date selection to change date.

Time entries (if any) for the current filter and date selection are listed.

- Swipe left or right to change period or date
- Touch and hold on an entry to enable the contextual selection; to select multiple entries, touch on the desired entry to select

Right Pane:

The Entry Preview screen displays the details of the selected entry.

To help you use AnTimeBiller in the most efficient way, touch the Menu action item and select Options to set various defaults and options on the first run.

To setup clients, touch the Menu action item and select 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, touch the Menu action item and select Setup clients.
2. To add a client, touch the New client action item.
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. Touch the New project/task/contact action item, or touch the Menu action item and select New rate.
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. Touch 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 action item.
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 the drop down menu button (◢) of the item 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.

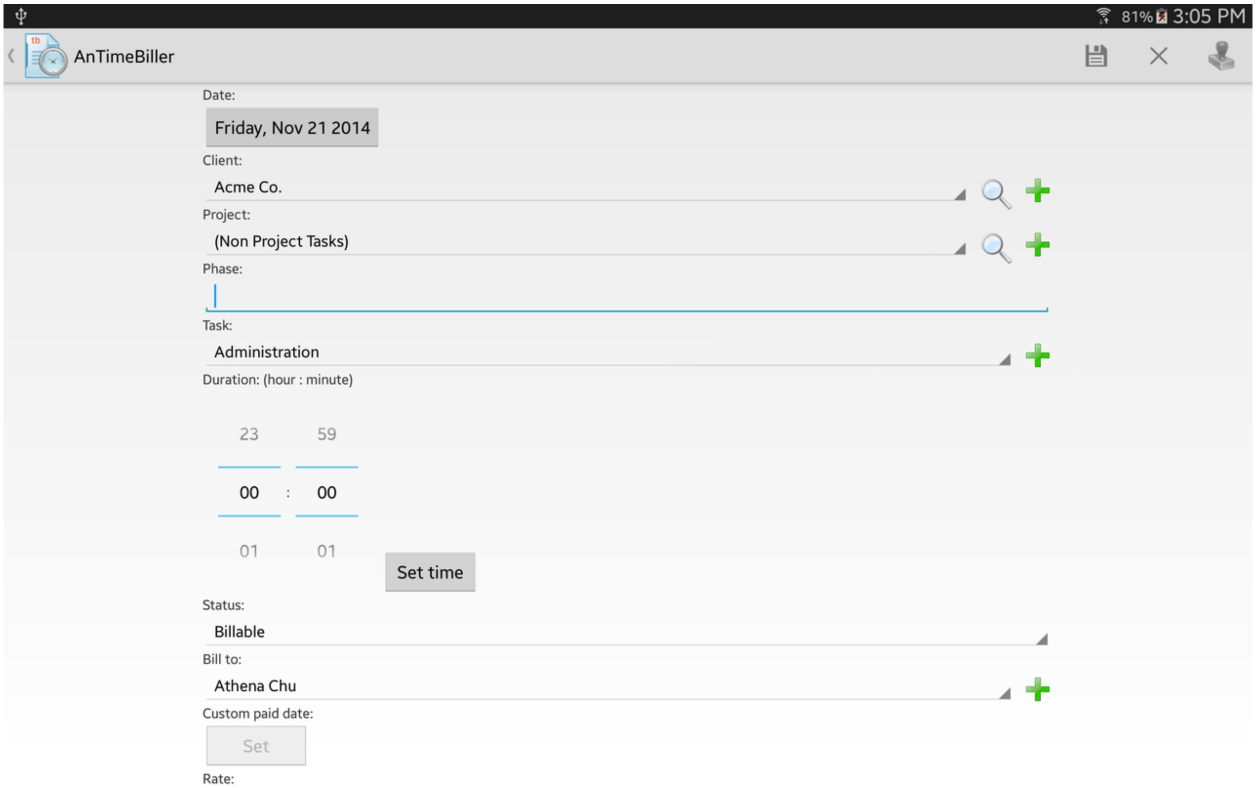
To import a text file:

1. Create a text file with each item on its own line.
2. Touch the import button () of the Projects/Tasks/Contacts category.
3. Select the source file to import.
4. Touch the Import button to confirm.
5. The imported items are displayed.

To import tasks for a project, touch on the desired project to open the project task screen, press the Menu key and select Import.

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

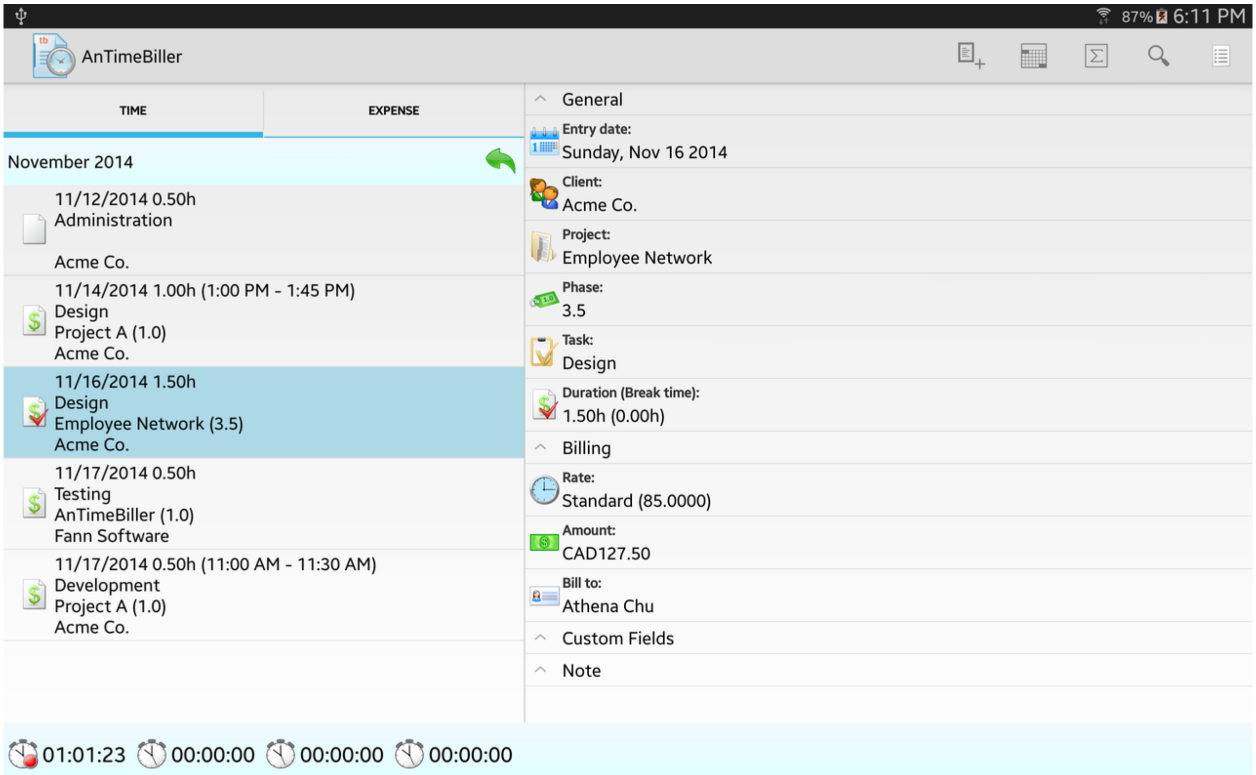
Create an Entry



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

Create an Entry Using a Timer

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



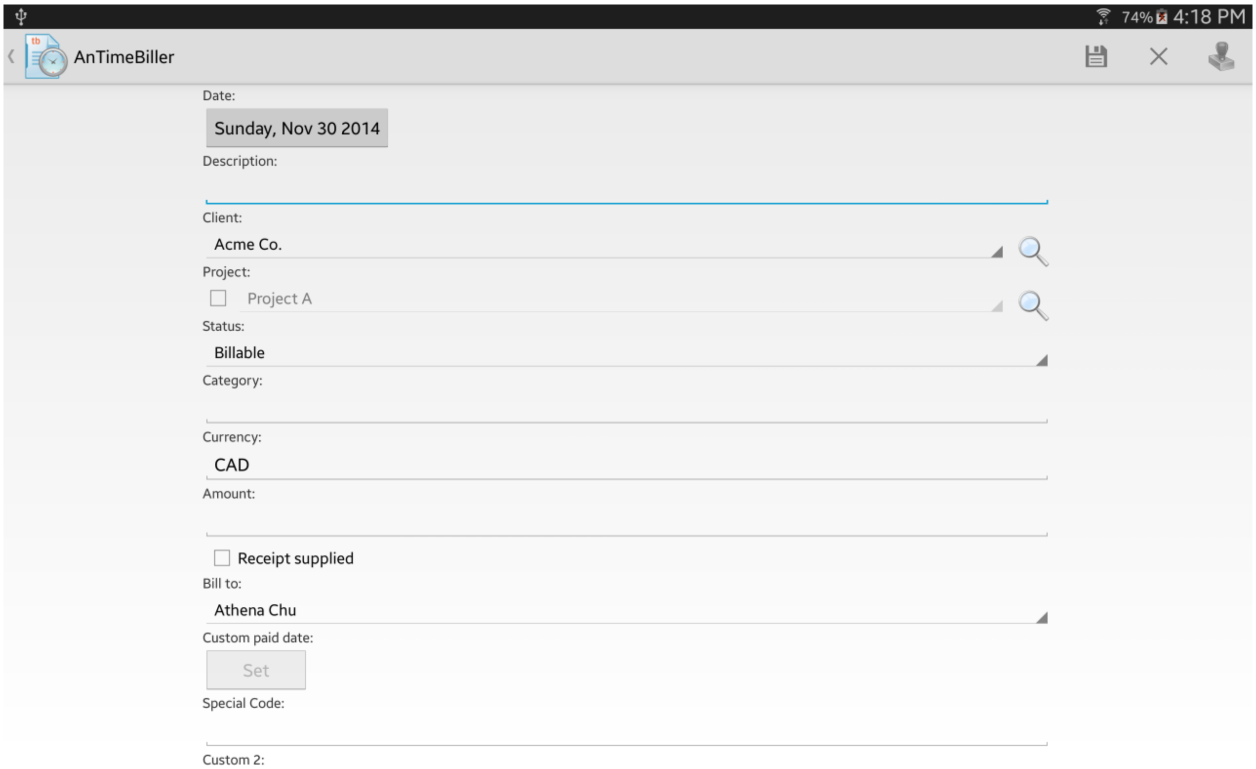
1. From main screen, touch the Timer icon to start a timer.
2. (Optional) Select a client.
3. (Optional) Select a project.
4. (Optional) Enter a phase.
5. (Optional) Select a task.
6. (Optional) Check the check box on Start time to enter a start time.
7. Touch the Start button to return to the main screen.
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 action item 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, touch the Menu action item and select Options→Timer from main screen.

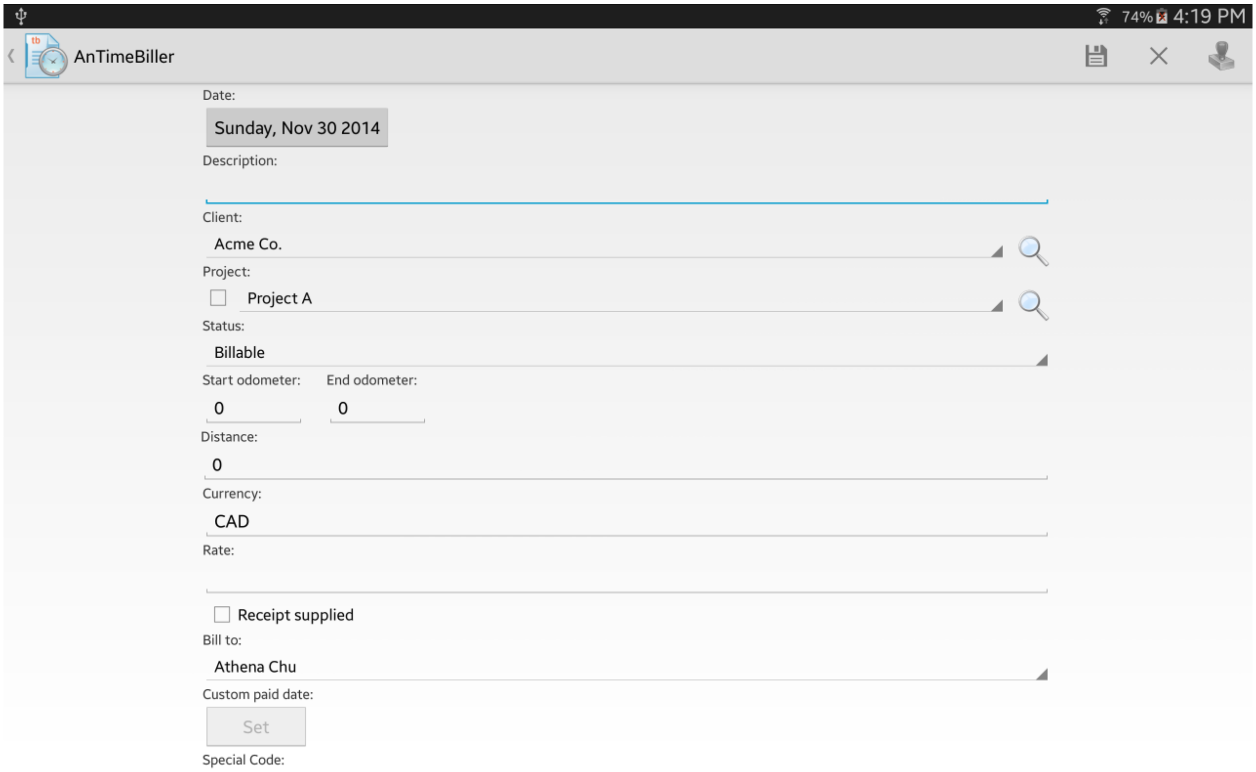
Create an Expense Entry

General Expense



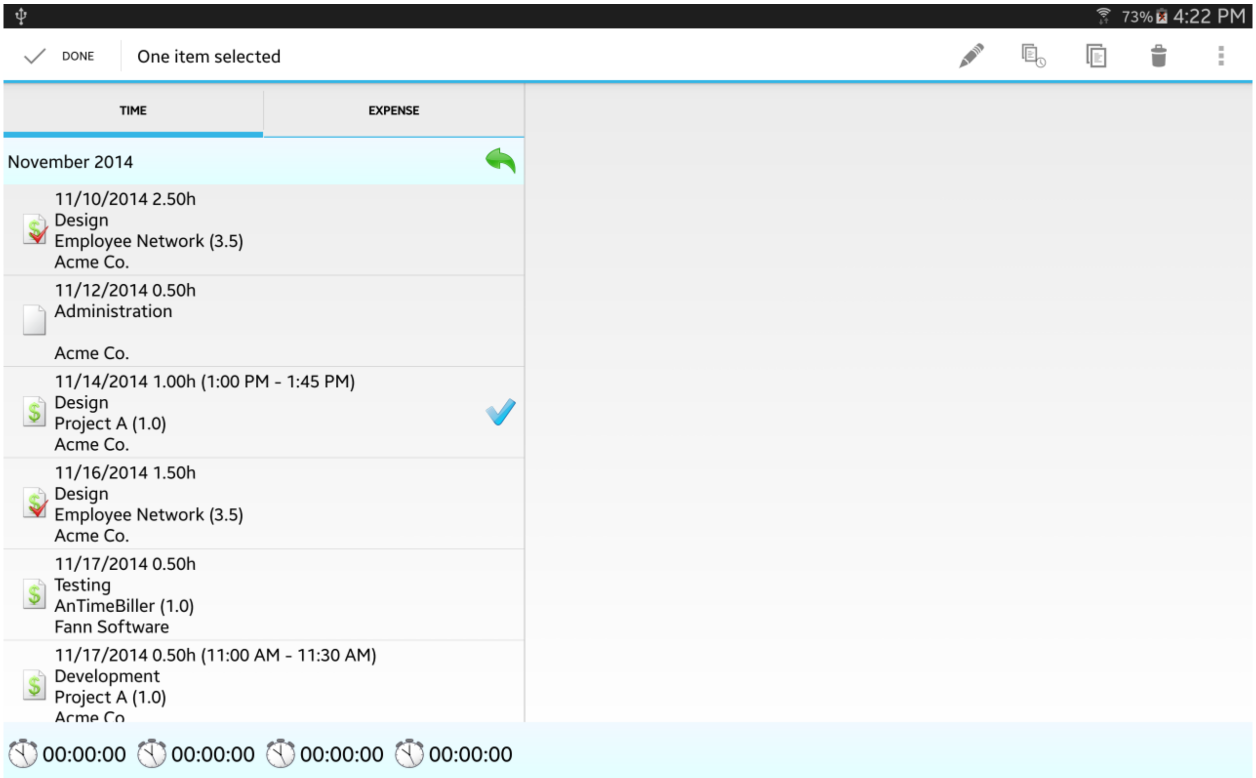
1. From main screen, touch the Expense tab.
2. Touch the New general action item.
3. Select a date for the entry. The default is today.
4. Enter a description.
5. Select a client or touch the ( ) button to search for a client.
6. (Optional) Check the check box under Project to select a project or touch the ( ) button to search for 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. (Optional) Touch the Set field defaults action item to save the field values for future use.
17. Touch the Save action item to save the entry, or the Cancel action item to discard.

Mileage Expense



1. From main screen, touch the Expense tab.
2. Touch the New mileage action item.
3. Select a date for the entry. The default is today.
4. Enter a description.
5. Select a client or touch the ( ) button to search for a client.
6. (Optional) Check the check box under Project to select a project or touch the ( ) button to search for 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. (Optional) Touch the Set field defaults action item to save the field values for future use.
17. Touch the Save action item to save the entry, or the Cancel action item to discard.

Modify an Entry



Touch and hold on the entry to display the contextual action menu.

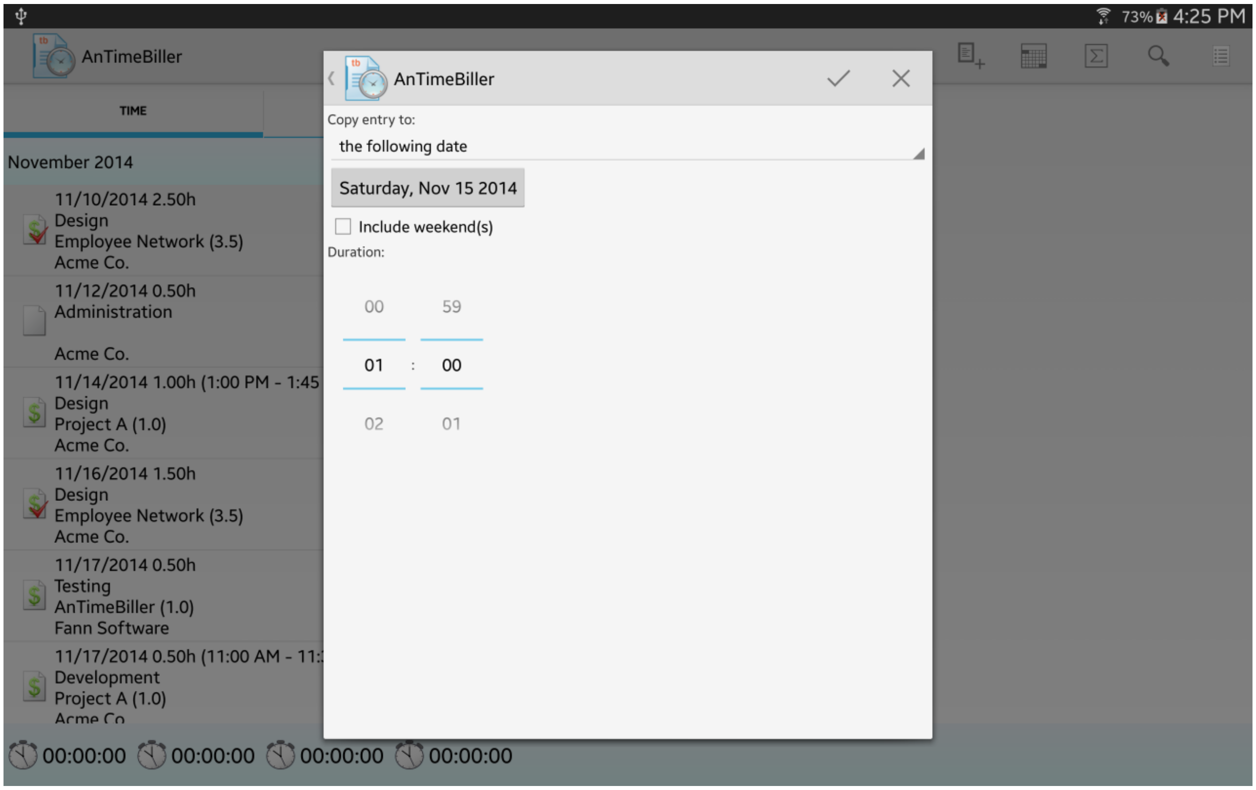
- Modify ( ) − to edit the entry
- Create copy − to create a copy of the entry
- Copy + New timer ( ) − to create a new timer based on the entry
- Copy ( ) − to duplicate the entry for the rest of the week, to a specified date or end date
- Billed − to check/uncheck the entry as billable/billed
- Paid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

Multiple Selection

To select multiple entries, touch and hold on the first entry, touch to select the rest of the desired entries.

- Billable − to mark the entries as billable
- Billed − to mark the entries as billed
- Paid − to mark the entries as paid
- Delete ( ) – to delete the entries

Copy an Entry



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

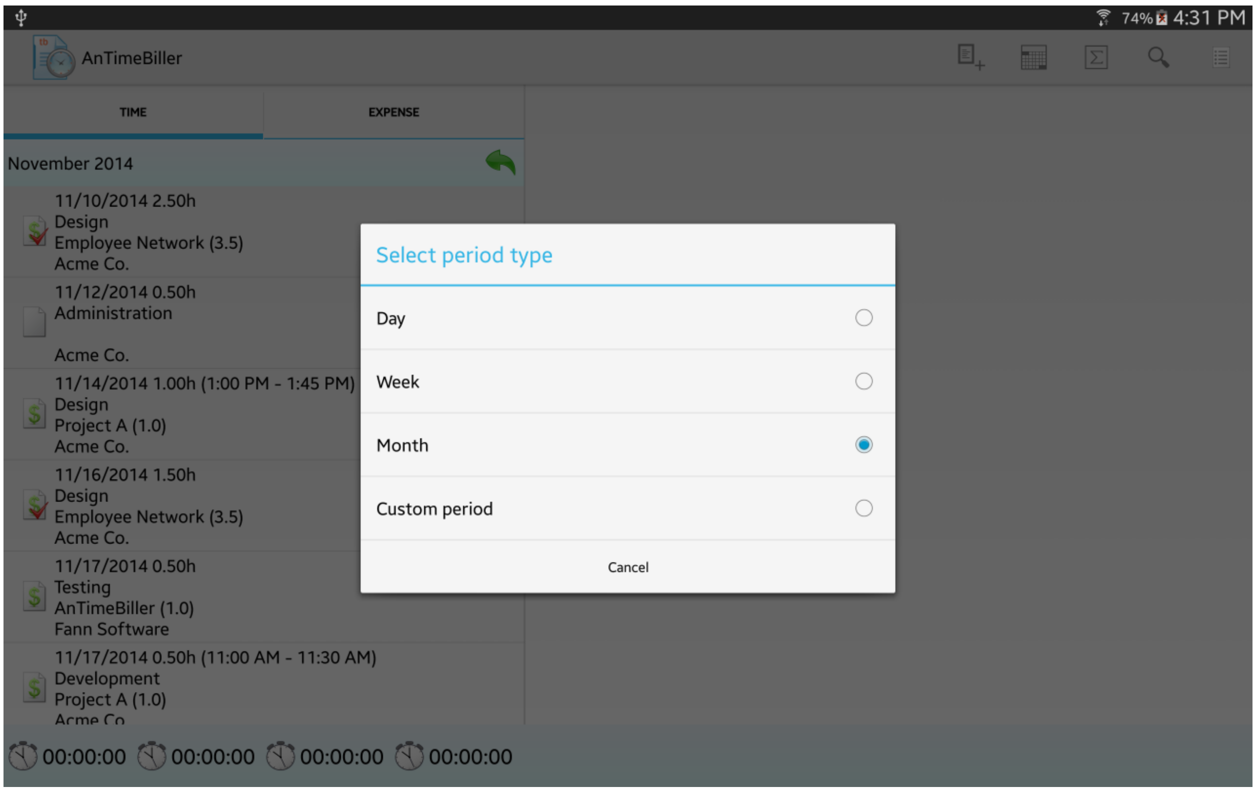
1. Touch and hold on the entry.
2. Select Copy.
3. Select the desired option(s).
4. Change the duration if desired.
5. Touch the Save action item.

Customize Main View

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

- Date range
- Data filter

Date Range



From main screen, touch the Period type action item and select to display data by day, week, month or a custom period.

To change a custom period, touch the Menu action item and select Set period.

Data Filter

Use filter to limit the amount of displayed data:

1. From main screen, touch the Menu action item and select Filter→Set filter.
2. Select the desired criteria.
3. Touch the OK action item.

Options

From main screen, touch the Menu action item and select 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, touch the Quick summary action item to display the summary statistics for the currently displayed period.

Display Client Summary

1. From main screen, touch the Time tab.
2. Touch the Client summary action item.
3. Select a client.
4. (Optional) Check the check box under Project to select a project.
5. (Optional) Check the check box under Task to select a task.
6. Touch the Show summary button.

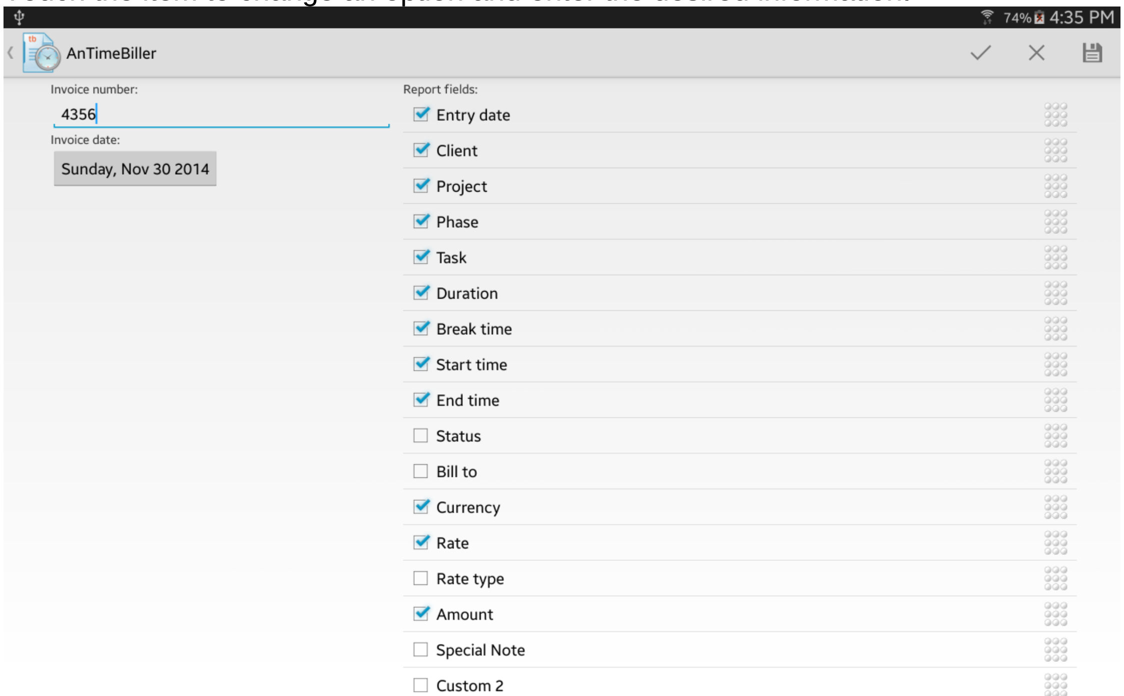
Create a Report

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

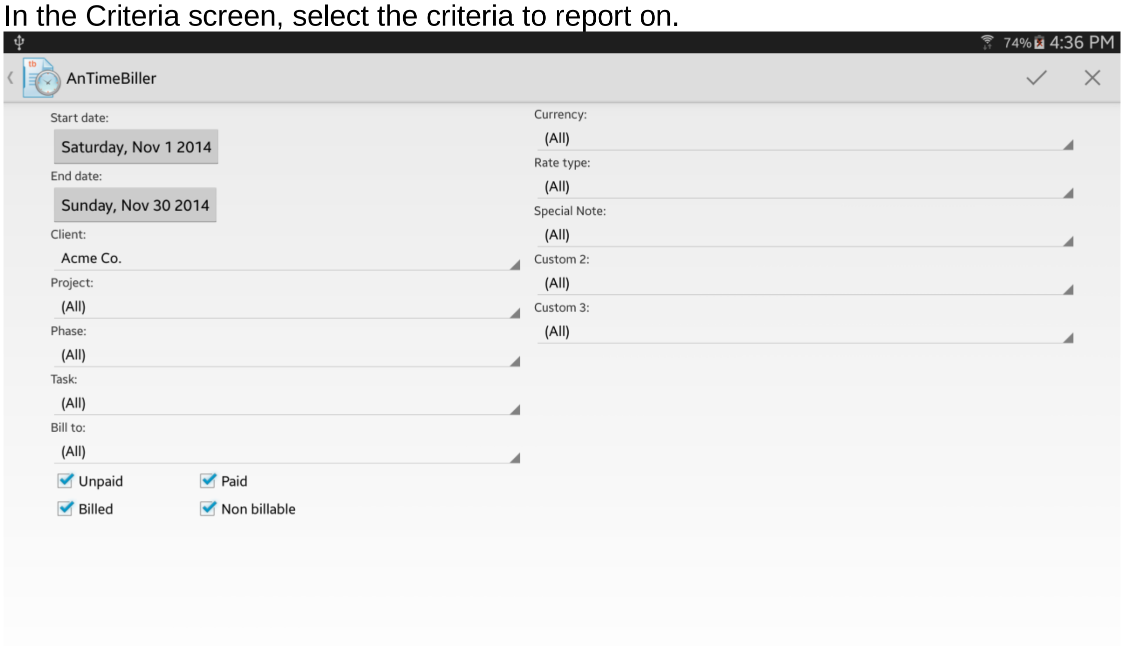
To create a report:

1. From main screen, touch the Time tab.
2. Touch the Menu action item and select Report→Invoice report/Tabular report/Group by report/Load report.

3. Touch the item to change an option and enter the desired information.



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 touching the Save report action item, enter a name and touch the OK button.
6. Touch the OK action item to continue.
7. In the Criteria screen, select the criteria to report on.

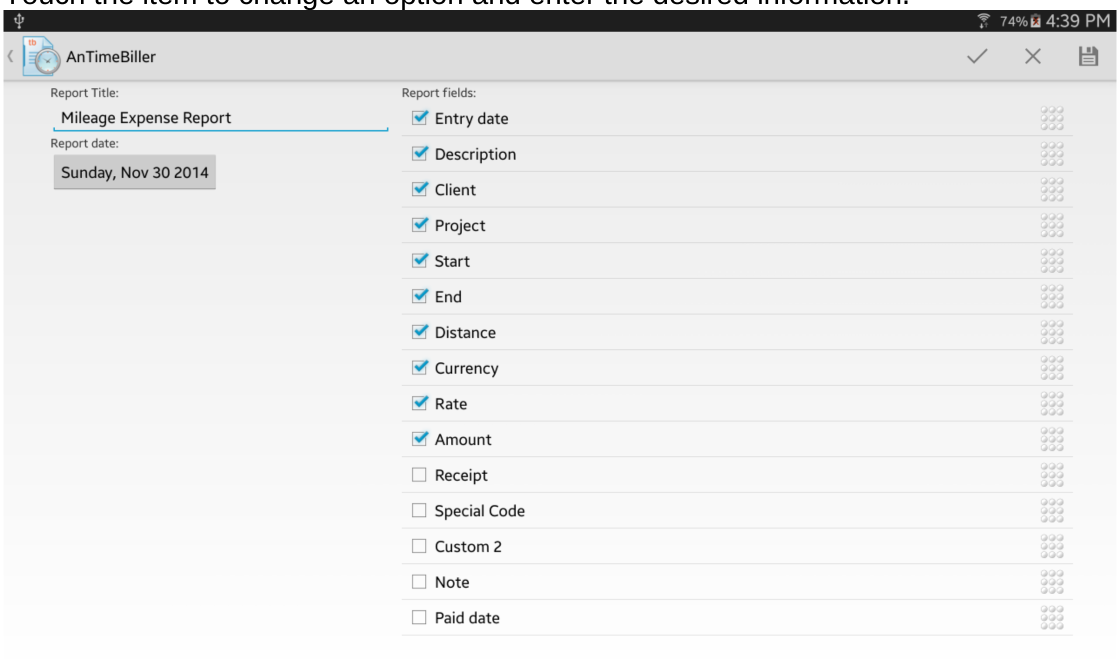


8. Touch the OK action item to continue.
9. Enter a filename for the report output. It will be saved as a HTML file.

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.

Create an Expense Report

1. From main screen, touch the Expense tab.
2. Touch the Menu action item and select Report→Mileage report/General expense report/Load report.
3. Touch the item to change an option and enter the desired information.

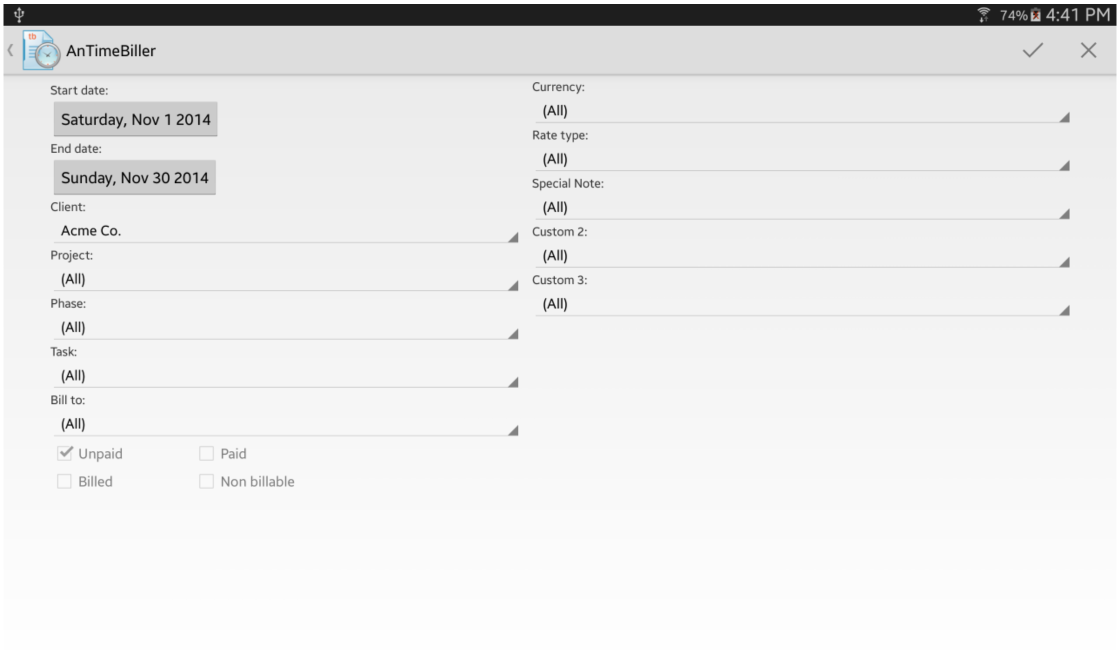


4. For Report fields, check the check box to select the items to be displayed, touch and hold the drag handle ( ) to alter the display order on the report.
5. (Optional) Save custom report by touching the Save report action item, enter a name and touch the OK button.
6. Touch the OK action item to continue.
7. In the Criteria screen, select the criteria to report on.
8. Touch the OK action item 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, touch the Time tab.
2. Touch the Menu action item and select Data→Mark billed entries/Mark paid entries.
3. Select the desired criteria.



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

To mark expense entries:

1. From main screen, touch the Expense tab.
2. Touch the Menu action item and select Data→Mark billed entries/Mark paid entries.
3. Select the desired criteria.
4. Touch the OK action item.
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 by touch and hold on the entry.

Export Data

AnTimeBiller supports Comma Separated Values (CSV) format.

To export time entries:

1. From main screen, touch the Time tab.
2. Touch the Menu action item and select Data→Export CSV.
3. Select the desired criteria.
4. Touch the OK action item 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.

To export expense entries:

1. From main screen, touch the Expense tab.
2. Touch the Menu action item and select Data→Export CSV.
3. Select the desired criteria.
4. Touch the OK action item 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, touch the Time tab.
2. Touch the Menu action item and select Data→Create backup.
3. Enter a filename.
4. Touch the OK button.

To restore from a backup:

1. From main screen, touch the Time tab.
2. Touch the Menu action item and select Data→Restore backup.
3. Select a backup file to restore.

Set Defaults

From main screen, touch the Menu action item and select Options→Entry defaults to set default values for new entries.

Edit Drop Lists

1. From main screen, touch the Time tab.
2. Touch the Menu action item and select Data→Manage drop lists.
3. Select the list type.
4. To remove an item, check the check box and touch the Delete action item.
5. To remove all items, touch the Delete all action item.

Archive Data

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

To reload archived data back into AnTimeBiller, touch the Menu action item and select Data→Load archive from the Time tab, 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. From main screen, touch the Menu action item and select Options→Custom fields.
2. Select the desired field to edit.
3. Enter a description.
4. Touch the OK button.