Billings Touch User Guide

(June 03, 2011)

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Objective

The purpose of this document is to help you with getting started and using Billings Touch.

Audience

This document is aimed at individuals who are new to Billings Touch and may/may not use Billings for Mac. You will learn how to set up the various pre-requisites and start working with Billings Touch on a day-to-day basis.

Requirements

Device requirements

- **Devices supported:** We support all iPod Touch and iPhone models.
- Minimum operating system is iPhone OS 3.0 or later for your iPhone/iPod Touch.
- **Minimum space requirement**: The application size is 10 MB. Your database size can range between 1 to 50 MB.

System requirements

If you intend to synchronize Billings Touch with Billings on your Mac, you'll need the following:

- You must use Billings 3.5 or later on your desktop.
- You must use Mac OS 10.5 Leopard or higher.

About Billings Touch

Billings Touch is designed for tracking time and sending invoices on the go. It is a dual-mode application as it can run standalone or sync seamlessly with Billings on your Mac.

Using Billings Touch, you can send invoices, accept payments and retainers even when you are on the move. This enables you to stay productive, keep track of time, and bill clients with accuracy.

Billings Touch has most of the features of Billings on your Mac except the following:

• Estimate, estimate slips
• Statements
• Editing templates
• Labels, envelopes
• Reports
• More invoice templates (more sophisticated or custom ones as well)

If you require these advanced functions, please consider using Billings Touch in conjunction with Billings on your Mac.

Note: If you wish to use multiple currencies, you should update to **Billings 3.6** and **Billings Touch 1.1**. Multi-currency support works properly only on these recommended versions.

Comparison between free version of Billings Touch and fully enabled version of Billings Touch

Features	Free version	Full version
Synchronization with Billings on your Mac	No	Yes
Emailing invoices	No	Yes

Using Billings Touch as a standalone application

1. Download Billings Touch from the App store onto your device and follow the on-screen instructions.
2. When you launch Billings Touch for the first time, you'll see a "Welcome" screen.
3. Select "Start from scratch."
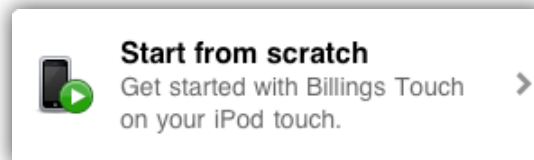
4. Customize the Identity, Taxes, Rates and Units as required.
5. When complete, tap **Done**.
   An empty Billings Touch database is created on your device and the **Home** screen opens. You can now start working.

For more information about working with Billings Touch, refer to "Workflow suggestions" section.

Using Billings Touch with Billings on your Mac

1. Download Billings Touch from the App store onto your device and follow the on-screen instructions.
2. When you launch Billings Touch for the first time, you'll see a "Welcome" screen.
3. Select "Pair with Billings Mac."

4. Follow the on-screen instructions.
5. Set up pairing between your device and Billings on your desktop for synchronization purposes. Read "Pairing Billings Touch with Billings" for more information.

Note: We recommend that you set up pairing and then synchronize Billings Touch with Billings on your Mac. Only after doing this, you may proceed to use either of these applications. If you were to create 2 different databases (one on your device and another on your Mac), work with them independently, and want to combine them, you cannot do so as we don't support merging.

Pairing Billings Touch with Billings

1. Ensure that your iPhone/iPod Touch and your Mac are on the same Wi-Fi network. You can [create an ad hoc computer-to-computer network](#) if you wish.
2. Launch Billings Touch on your iphone/iPod Touch.
3. Launch Billings 3.5 on your desktop computer.
4. Choose **Billings > Preferences** and select **Touch** in the toolbar.
   You should see your device listed. You will also see any open Billings Touch devices that are running.
5. Select your device and click **Pair**.
6. In the sheet that opens, specify which Billings data should be kept by clicking **Touch** or **Mac**. Select **Touch** if you want your Billings Touch database to be copied onto your Mac. Select **Mac** if you want Billings on your desktop to be copied to your device.
   Note the synchronization code which appears as a 4 digit number.
7. Enter the synchronization code on the Billings Touch device.
   This initiates the first sync. When syncing is complete, you can start working.

Synchronization

If you are using a free version of Billings Touch, then synchronization is **not** available. If you are using a full version of Billings Touch, you can sync your device with your Mac. Personal syncing designed to work over Wi-Fi in your home or office network (not on the Internet) keeps the Touch database and the desktop application in sync.

Note: Your iPod Touch/iPhone must be on the same network as the computer running Billings.

Synchronizing Billings and Billings Touch

If Billings 3.5 is running on your desktop when you launch Billings Touch on your device, then Billings Touch will automatically sync on launch.

You can also sync manually by going to Billings on your desktop and doing **one** of the following:

- Choose **Billings > Preferences**, select **Touch**, and click **Sync Now**.
- Choose **File > Sync**.

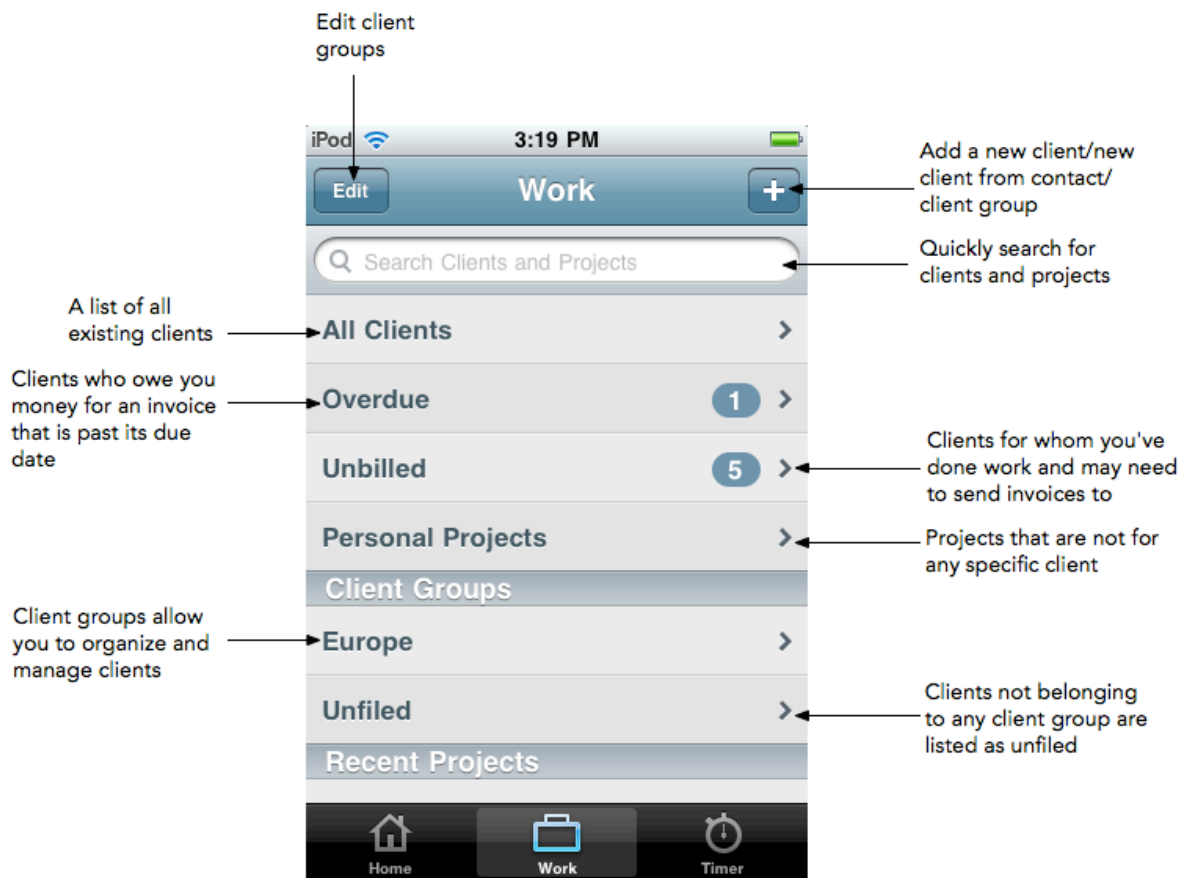**Note:** Billings Touch should be running to be able to use these options for manual sync.

When you initiate syncing using Billings on your desktop, you can cancel the sync at any point.
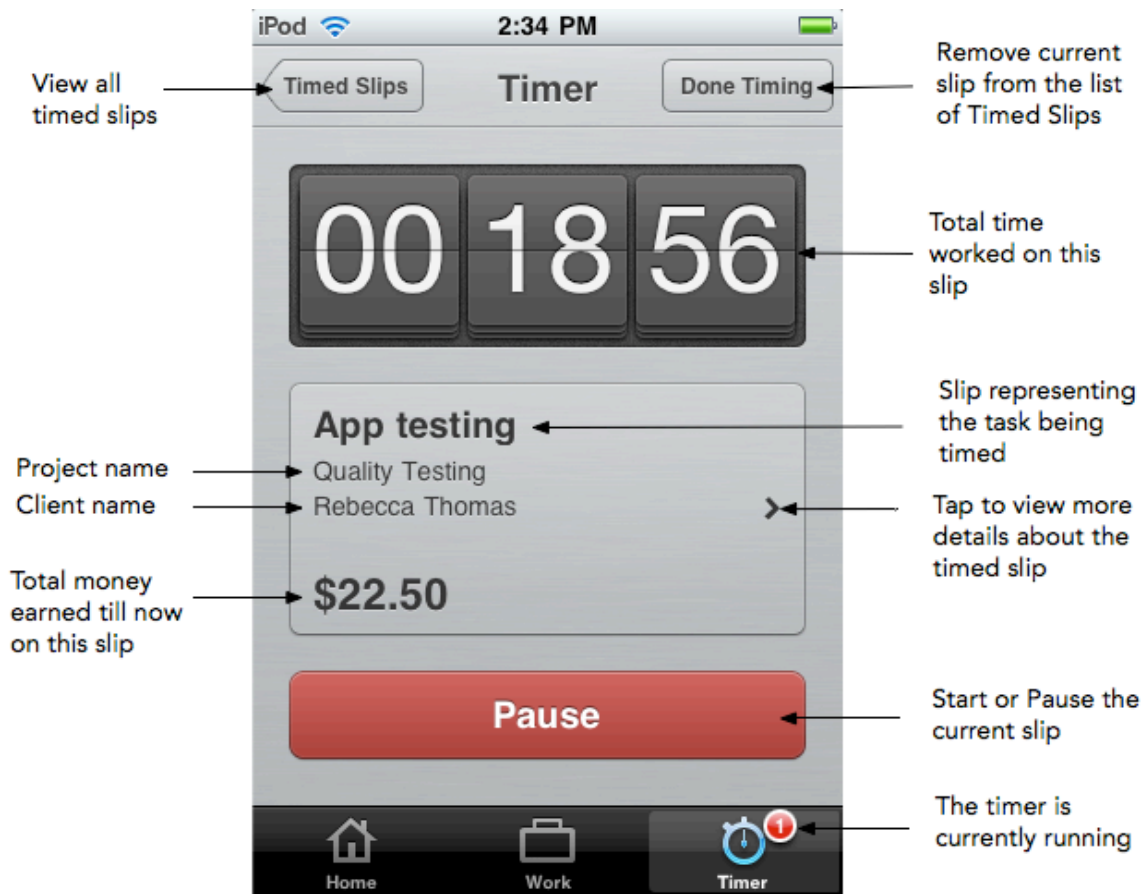
Basics

The Home screen

Buttons to create different kinds of slips →

Buttons to switch the graph for displaying the total amount billed each day or total time spent working each day in the past week

Go to the Home screen

Home

New Timed Slip   Add Expense   Add Mileage

Add Quantity   New Fixed Slip   Use Blueprint

$12,000.00
$8,000.00
$4,000.00
$0.00
S Su M Tu W Th F

Unfiled Slips   2 ›

Settings   ›

Home   Work   Timer

Create a new slip using a blueprint

Slips not associated with any project are listed as Unfiled slips

Specify your preference settings for identity, rates & units, taxes, blueprints, and invoices

Go to the Work screen

Go to the Timer view

The Work screen

Edit client groups

Add a new client/new client from contact/ client group

Quickly search for clients and projects

A list of all existing clients

Clients who owe you money for an invoice that is past its due date

Clients for whom you've done work and may need to send invoices to

Projects that are not for any specific client

Client groups allow you to organize and manage clients

Clients not belonging to any client group are listed as unfiled

iPod 3:19 PM

Edit **Work** +

Search Clients and Projects

All Clients >

Overdue 1 >

Unbilled 5 >

Personal Projects >

Client Groups

Europe >

Unfiled >

Recent Projects

Home Work Timer

The Timer screen

View all timed slips

Timed Slips

Timer

Done Timing

Remove current slip from the list of Timed Slips

00 18 56

Total time worked on this slip

App testing

Quality Testing

Rebecca Thomas

$22.50

Pause

Slip representing the task being timed

Project name

Client name

Tap to view more details about the timed slip

Total money earned till now on this slip

Start or Pause the current slip

The timer is currently running

Home   Work   Timer

The Settings pane

If you're using Billings Touch as a standalone application, you must enter certain preferences for using the application. Working from the **Home** screen of Billings Touch, tap **Settings** to specify your preferences.

If you're synchronizing Billings Touch with Billings on your Mac, then we recommend to enter all your preference settings in the desktop application. When you synchronize, these settings will be made available on your device.

Note: The "*Invoices*" settings are preferences for sending invoices using your device. This setting is for your device only, and will not sync with Billings on your Mac.
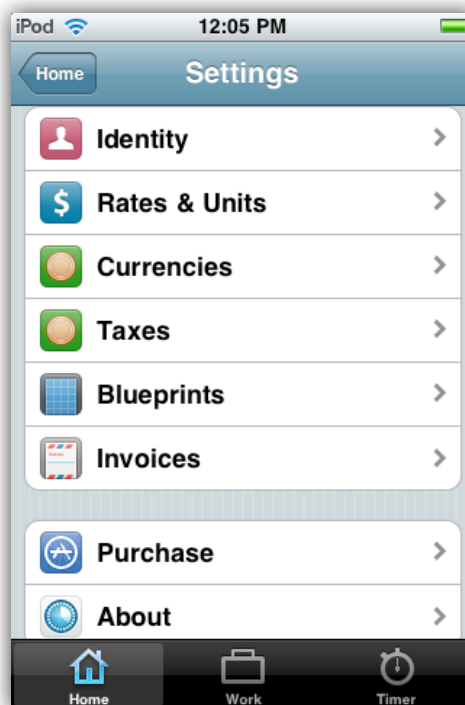
The Settings pane

Workflow suggestions

Whether you wish to use Billings Touch as a standalone application or you prefer to sync with Billings on your Mac, the following workflow suggestions apply in both cases.

A. Adding a client

A client is a person or organization whom you bill for the work done. From the **Work** screen of Billings Touch, you can create new clients or add contacts from Address Book on your device as clients or even set up a new client group.

Note: All new clients you create in Billings Touch are also added to the "Contacts" application of your device.

The **Work** screen of Billings Touch allows you to view your clients (including overdue and unbilled clients), personal projects, client groups, and recent projects.

To add a client

1. From the **Work** screen, tap the "+" button at the top-right corner of the device.
2. Select one of the following:
    - **New Client.** Enter the details of the new contact and tap **Done**.
    - **New Client from Contact.** This displays all the contacts on your device. You can select one of them to include them as a new client in Billings Touch.
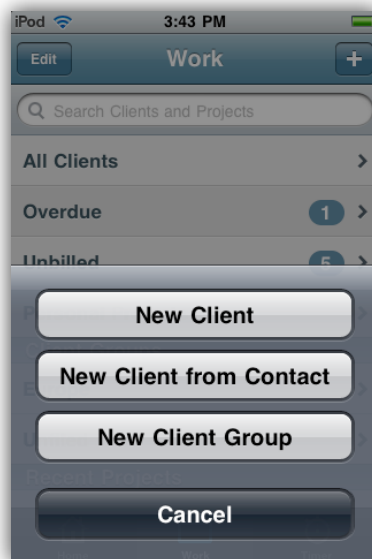
Adding a new client

Alternately, you can also add new clients by selecting **All Clients** and tapping the "+" button at the top-right corner of the device. Once you're done creating a client,

Billings Touch shows the **Projects/Accounts** list for the client. You can set up a project, if desired.

Client groups allow you to organize and manage clients by classifying them into distinct groups. From the **Work** screen, add a new client group by simply tapping the "+" button at the top-right corner of the device and selecting **New Client Group**. When you select a pre-existing client group, you can add a new client to that group by tapping the "+" button at the top-right corner of the device.

Note: If you've added an address for your client, simply tapping the address will open a Google map displaying the location. If you are meeting a client and looking for directions, this feature comes in handy.

B. Adding a project

Projects are designed to reflect the organization of work in real life. You can use Billings Touch to create projects for your clients. Projects you wish to add for your own personal use and are not associated with any client can be included as "Personal Projects."

To create a project for a client

1. From the **Work** screen, you can do one of the following:
    • Tap **All Clients** and select a client. OR
    • Tap a client group and select a client.
2. In the **Client** view, tap **Projects**.
3. Tap "+" button at the top-right corner of the device.
   This opens a **New Project** pane.
4. Enter the project details and tap **Done.**
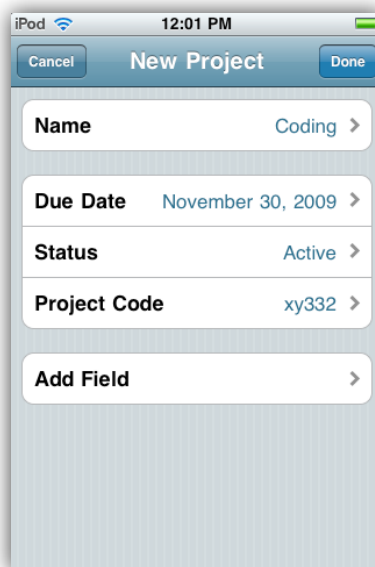
Creating a new project

All projects of a client can be viewed by going to the **Client** view and tapping **Projects**. Billings Touch sorts projects by status displaying active projects at the top of the list and completed/cancelled projects at the bottom of the list.

C. Adding slips

A slip corresponds to a task, or a small series of tasks, which eventually become line items on an invoice. There are 5 different kinds of slips: Timed, Expense, Mileage, Quantity, and Fixed slips. There are 2 different methods to quickly create any of these slips.

1. **From the Home screen**
   Simply tap one of the buttons at the top of the **Home** screen to create a slip of that kind. The slips created this way are all unfiled (i.e. not associated to any project or client). You'll have to manually link them to the project of a client later. This method is useful when you want to get started quickly but organize your slips at a later stage.
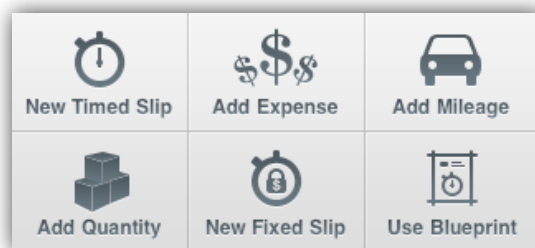
The Home screen with buttons to create slips

2. **From the Project view of a client**
   Select a client, tap the **Projects** tab, and select a project for adding the slip. In the **Project** view, tap the "+" button at the top-right corner of the device.
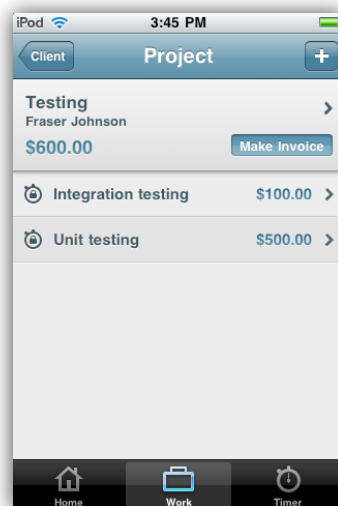
Viewing a client's project

You'll be presented with buttons to add different kinds of slips. Create a new slip, enter the details of the slip, and tap **Done**. Slips added this way are linked to the project of the client.

Note: New slips not given a name will use the current date and time as their name. New timed, quantity, and fixed slips use the client hourly rate specified in the **Settings** pane under **Rates & Units**.

a. Recording time

Timed slips track the time spent working on a task, and use an hourly rate to calculate the total amount due. Billings Touch has a timer function similar to the one in your desktop Billings application. The timer is useful for tracking time and recording the duration in the slip. You can also manually edit a slip and enter the time.

To create a new timed slip

1. Working from the **Home** screen, tap **New Timed Slip**.
2. Enter a name for the slip.
3. To add additional information about the slip, tap **More**. Enter the details and tap **Done**.
   Billings Touch displays the new timed slip in the Timer and you can start timing.

You can also start timing from the **Timed Slip Info** pane by tapping **Start Timing**.
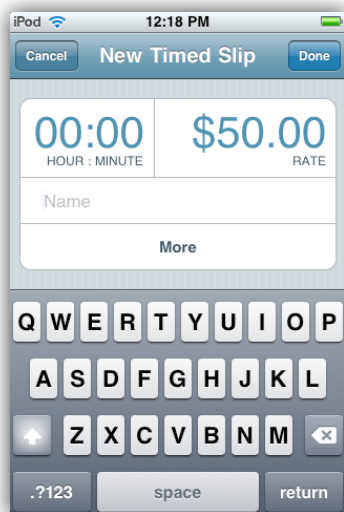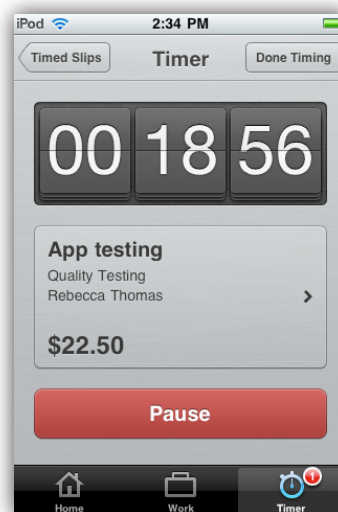
Creating a new timed slip   Timing a slip

For example, if you're at a client site and wish to track how long you will be working there, then simply create a new timed slip, enter the details, and start the timer. When you are done, you can link the slip to a project. Once you are done working on the project, you can send an invoice to the client.

Or, you could synchronize with Billings for Mac and send the invoice from your Mac.

Note: You can view a timed slip in the Timer using the following methods.

a. In the **Timer** view, there is a **Timed Slips** button at the top-left corner. Tapping this button displays all timed slips. The most recently timed slips appear at the top of the list. If a slip is currently being timed, then the duration worked on the slip shows up in red color in the **Timed Slips** list. Tapping a timed slip opens that slip in the Timer.

b. Working from the **Unfiled Slips** view or **Project** view, you can select a timed slip. This opens the **Timed Slip Info** pane. If you scroll down, there is a button at the bottom called **Start Timing** which will open the timed slip in the Timer and start timing.

b. Recording expense

Expense slips are a way of specifically tracking any miscellaneous expenses associated with a project. Working from the **Home** screen, you can create a new expense slip.

To create a new expense slip

1. Working from the **Home** screen, tap the **Add Expense** button.
2. Enter the details.
3. Tap **Done**.
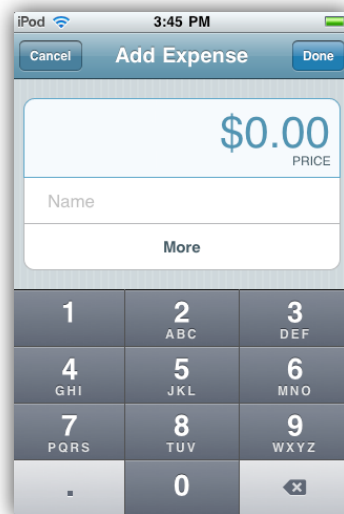
Creating a new expense slip

c. Recording mileage

Mileage slips record the distance travelled and rate per mile or kilometer to calculate the total cost. Working from the **Home** screen, you can create a new mileage slip.

To create a new mileage slip

1. Working from the **Home** screen, tap the **Add Mileage** button.
2. Enter the details.
3. Tap **Done**.
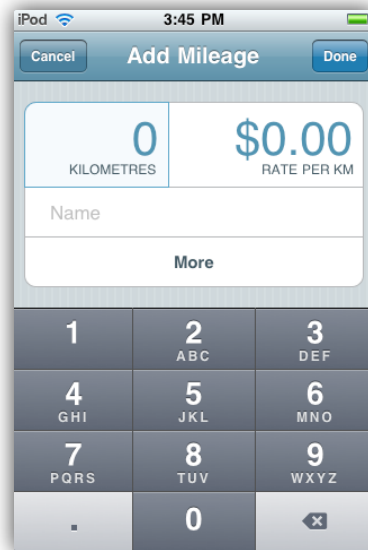
Creating a new mileage slip

For example, you travel from Toronto to Ottawa for work. You can set up a mileage slip and enter the total distance travelled and rate per mile or kilometer.

d. Recording quantity

Quantity slips use the number and price of an item to calculate the total cost. Working from the **Home** screen, you can create a new quantity slip.

To create a new quantity slip

1. Working from the **Home** screen, tap the **Add Quantity** button.
2. Enter the details.
3. Tap **Done**.
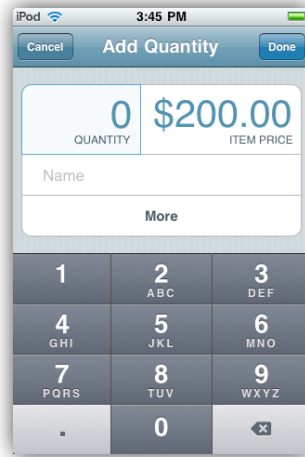
Creating a new quantity slip

For example, you can use quantity slips when selling a product to a client.

e. Creating a new fixed slip

Fixed slips track the time spent on a task, but allow you to charge a flat rate to your client. Working from the **Home** screen, you can create a new fixed slip.

To create a new fixed slip

1. Working from the **Home** screen, tap **New Fixed Slip**.
2. Enter a name for the slip.
3. To add additional information about the slip, tap **More**. Enter the details and tap **Done**.
   Billings Touch displays the new fixed slip in the Timer and you can start timing if required.
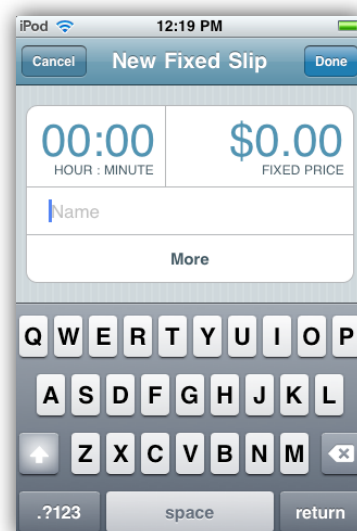
Creating a new fixed slip

For example, consider you are working for a client for a fixed rate. You can create a new fixed slip and link it to the respective project. If you're interested in knowing how long you'll be working, you can start the timer for this slip and record time.

f. Creating a slip from a blueprint

A slip blueprint is a preset for frequently used slips. It is a template that has information for you to quickly create and use slips.

To create a new slip using blueprint

1. Working from the **Home** screen, tap **Use Blueprint.**
2. Select a blueprint.
   Note: If you have not set up any blueprint, you may do so by going to the **Settings** pane of Billings Touch and tapping **Blueprints**. Or, you could add them in the **Blueprints** pane of Billings Preferences on your Mac and synchronize with your device.
3. Enter the details if any.
4. When complete, tap **Done**.
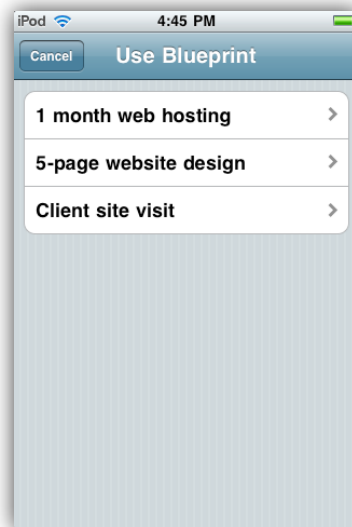
Creating a slip from a blueprint

Slip blueprints are useful if you repeat similar tasks frequently for many clients, or if you regularly sell certain products or incur certain expenses.

Note:
Billings Touch allows you to conveniently switch between timed and fixed slips. While creating a new timed slip, tap **More**. Tap the "Kind" of slip and select **Fixed**. Tap **Save**.
The same applies to fixed slips as well. They can be easily switched into timed slips.

Filing slips

Slips that are not associated with any project or client are considered as "Unfiled slips."You can view these slips by going to the **Home** screen of Billings Touch and tapping **Unfiled Slips**. For example, when you are at a client site, you can quickly create a timed slip for tracking how long you will be working there and start timing. This slip is added to the "'Unfiled Slips" list. When you are done timing, you can move the slip to the appropriate project.

To file a slip

1. From the **Home** screen, tap **Unfiled Slips**.
2. Tap **File** at the top-right corner of the device.
3. Select the slip(s) and tap **Move**.
4. Choose where you want to move the slip(s) to. You can also search clients and projects for moving the slip.

Alternately, all slip info panes have a button called **File Slip. Simply tap** this button and move the slip to the appropriate project.

D. Sending invoices

An invoice is a list of work done or products sold, with the total amount due for those items. Billings Touch enables you to send an invoice in 2 different ways. You can send an invoice from a project or from a client. If you've received a pre-payment from a client, you can deposit it in the retainer. Further, you could apply the retainer when sending the invoice.

To send invoices from a project

1. Select a project.
2. Tap **Make Invoice**. **Note:** This button is hidden when there are no slips to invoice.
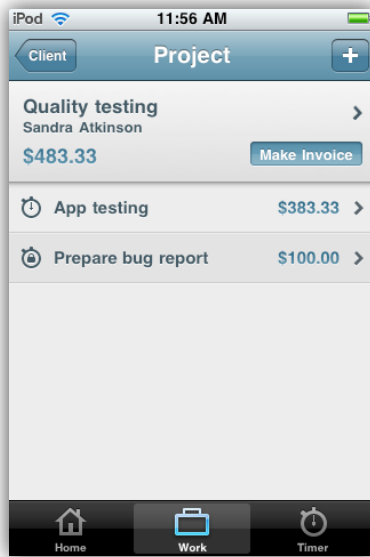
The Project view

3. Select and order the slips. To order the slips, tap the list button at the right end of the slip to select it and move the slip.
4. If you wish to apply a retainer, tap **Apply Retainer**. Enter the amount and tap **Save**.
5. Tap **Customize**.
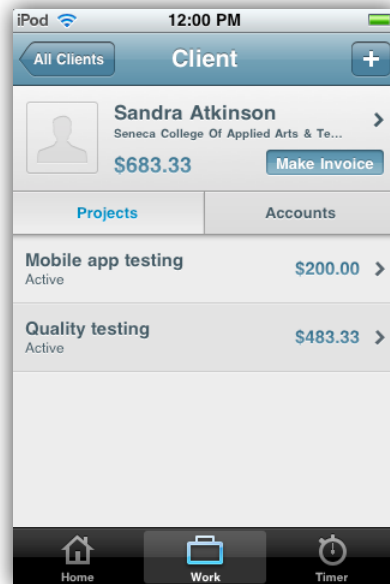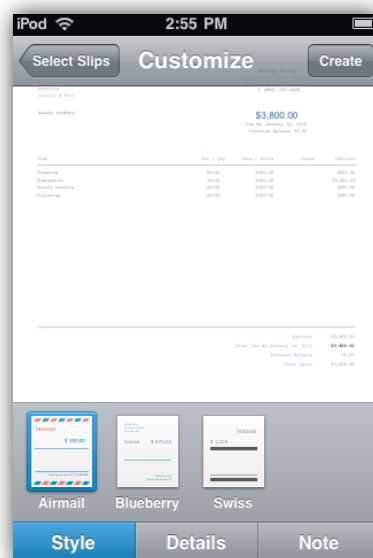6. Select a style, enter the details and/or note if necessary.

Customizing an invoice

7. When you are done, tap **Create**.
   Billings Touch displays the invoice.
8. Tap **Done**. Or, tap **Email Invoice to Client** to send an email.

To send invoices from a client

1. Select a client.
2. Tap **Make Invoice**. **Note:** This button is hidden when there are no slips to invoice.

The Client view

3. Select and order the slips. To order the slips, tap the list button at the right end of the slip to select it and move the slip.
4. If you wish to apply a retainer, tap **Apply Retainer**. Enter the amount and tap **Save**.
5. Tap **Customize**.
6. Select a style, enter the details and/or note if necessary.

Customizing an invoice

7. When you are done, tap **Create**.
   Billings Touch displays the invoice.
8. Tap **Done**. Or, tap **Email Invoice to Client** to send an email.

If you synchronize Billings Touch with Billings on your Mac, you can send invoice from the desktop application or your device. For invoices created using Billings Touch, an invoice PDF is generated for the Billings desktop application when synced.
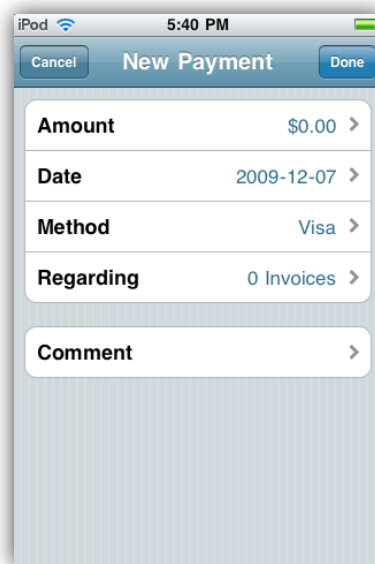
Invoices you send from your device are numbered according to the numbering scheme you've entered in the "Invoice" settings.

E. Accepting payments

A payment is an amount you receive from a client for the services you offer or products you sell, typically with respect to specific invoices you have sent. Payments are made on a per client basis. For example, you could have multiple invoices sent to a client for the work you've done. When the client makes a payment, you can select the invoice where you wish to apply the payment.

To add payment received from a client

1. Select the client.
2. Tap the **Accounts** tab.
3. Tap the "+" button at the top-right corner of the device.
4. Tap **New Payment**.

Adding a new payment

5. Enter the details of the payment.
   • Specify the amount, date of payment, and method.
   • Tap **Regarding** and select the invoice(s) for applying the payment. Tap **Done**.

24
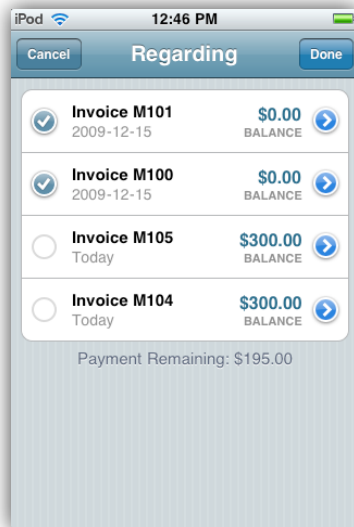
Select invoice(s) for applying the payment

- • Enter comments, if any.
6. Tap **Done**.

You can also edit an existing payment. Working from the **Accounts** tab of a client, select a payment. This opens the **Payment Info** pane displaying more information about the payment including the invoices it is applied to. Tap **Edit** and make the changes. Tap **Done**.
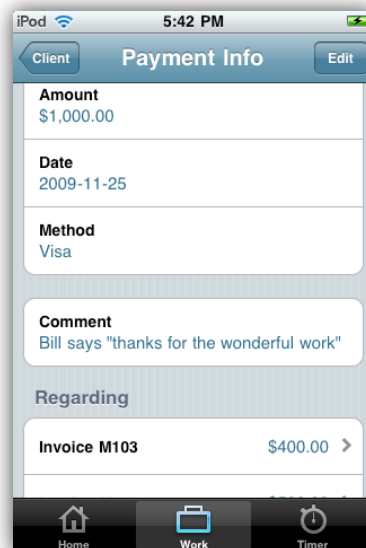

The Payment Info pane

F. Accepting retainers

A retainer is a fee paid in advance in order to secure your services. If you receive money from a client as a prepayment for services you will render, you can deposit it into the retainer, and later apply that retainer as payment against an invoice.

To add retainer

1. Select the client.
2. Tap the **Accounts** tab.
3. Tap the "+" button at the top-right corner of the device.
4. Tap **New Retainer**.
5. Enter the details for the retainer.
6. Tap **Done**.
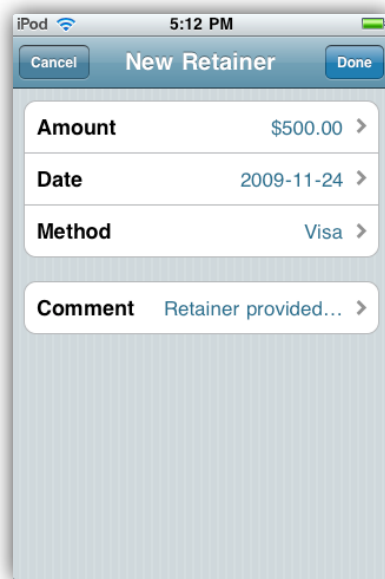
Adding a new retainer

You can also edit an existing retainer. Working from the **Accounts** tab of a client, select a retainer. In the **Retainer Info** pane, tap **Edit** to make the changes. Tap **Done**.
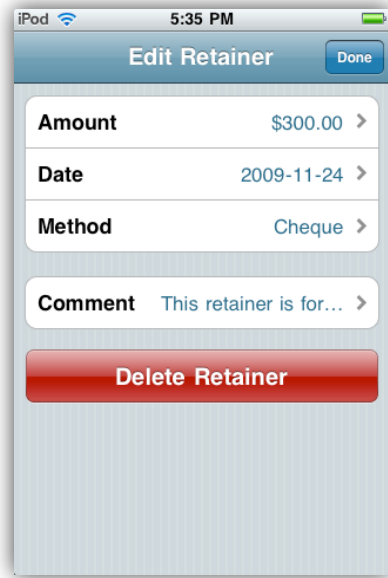
Editing an existing retainer

What preference settings from Billings are displayed in Billings Touch?

If you are using Billings Touch with Billings on your Mac, then please note that only certain preference settings from Billings are made available in Billings Touch.

Billings Preferences	Moved to Touch
General	No
Hot keys	No
Blueprints	Yes
Identity	Yes
Currencies	Yes
Taxes	Yes
Timers	No
Numbering	No
Labels	Client Groups: Yes Categories: No Payment Methods: Yes Workers: No
Extra Fields	For projects: Yes For clients: Yes
Templates	No

Help and other resources

There are a number of resources available to help you learn more about Billings and to provide answers when you have technical questions.

- Apple Help offers step-by-step instructions and tips for making the most out of Billings. While using Billings on your Mac, choose **Help > Billings Help**.

- The support website and knowledge base has up-to-date articles and movies that can help you solve technical difficulties. [Click here](#) for more information.

- Visit http://forums.marketcircle.com/groupee to share ideas, tips, and questions with other Billings users. Marketcircle engineers, designers, and support staff also share their knowledge on the forums.

Index

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