iBiz 3.0

Template Manual

IGG SOFTWARE

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iBiz Template Manual: Contents

Chapter 1: Introduction

Welcome to iBiz!

This manual is provided to help familiarize you with template editing in iBiz. If you are just getting acquainted with iBiz, please review the iBiz 3 User's Guide (available at http://www.iggsoftware.com/ibiz/iBiz_3_Manual.pdf) before reading this in-depth manual, which focuses specifically on the template features. Before we begin, here are a few notes about how to use this manual.

Browsing

To get a quick overview of what is contained in this manual, please visit the Table of Contents page and browse the chapter headings. Page numbers are included for quick reference. A Tag Reference has also been provided for browsing definitions of template tags in alphabetical order. If your PDF viewer has a Table of Contents tab, you can use this to easily jump between chapters in addition to the methods above.

Searching

If you have a particular question in mind, you can use the search function in your PDF viewer to locate the section of the manual that addresses it. The contents of this manual have been organized in question format to better help you find what you are looking for.

Hyperlinks

Throughout this manual you will find words or phrases that are highlighted in blue. The color indicates that the word or phrase is a hyperlink, which you can click to jump to another section of the manual for more information on that topic. These cross-references should help to ensure that you always find the right answers to your questions, no matter where you start your search.

Menu commands

In this manual, you are often instructed to choose commands from the various menus provided in iBiz. To simplify the menu hierarchy, we chose to use the '>' character to denote each sub-menu or menu item. To illustrate, when you see "Choose Client>Filter Out>Closed Clients," this can be interpreted as "Go to the Client menu, then go to the Filter Out submenu, then choose Closed Clients."

Chapter 2: Getting Started with Templates

What are iBiz templates all about?

In addition to tracking the work you perform, iBiz features the ability to generate invoices, estimates, and reports quickly and easily based on the information you record. iBiz uses templates to allow you greater control over how your invoices, estimates, and reports will appear. By creating, modifying, and organizing your templates, you can decide what information appears on the forms you create.

To illustrate, suppose you want to send an invoice to two of your clients. One client needs to know exactly what the rate is that you are charging her, but the other client set up a retainer account to handle his payment and does not expect to see the hourly charges. With iBiz, you can easily set up two different templates: they both may contain the same letterhead and formatting for consistency, but one can have rate information displayed while the other does not. Both templates can be stored for easy access each time the clients need to be billed.

To accomplish this kind of customization, iBiz templates include text commands called tags (e.g. <CLIENT NAME>). When iBiz generates an invoice, estimate, or report using a template, any tags contained within the template are replaced with appropriate data pulled from the client(s), project(s), and job event(s) for which the form is being made. You select which tags to include on each template, and thus what data is printed.

iBiz keeps all of your templates in one place for quick retrieval, and includes a basic template editor for building and modifying templates. There is no limit to the number of templates you can have, so feel free to create a template for any occasion!

What is the difference between invoice/estimate templates and report templates?

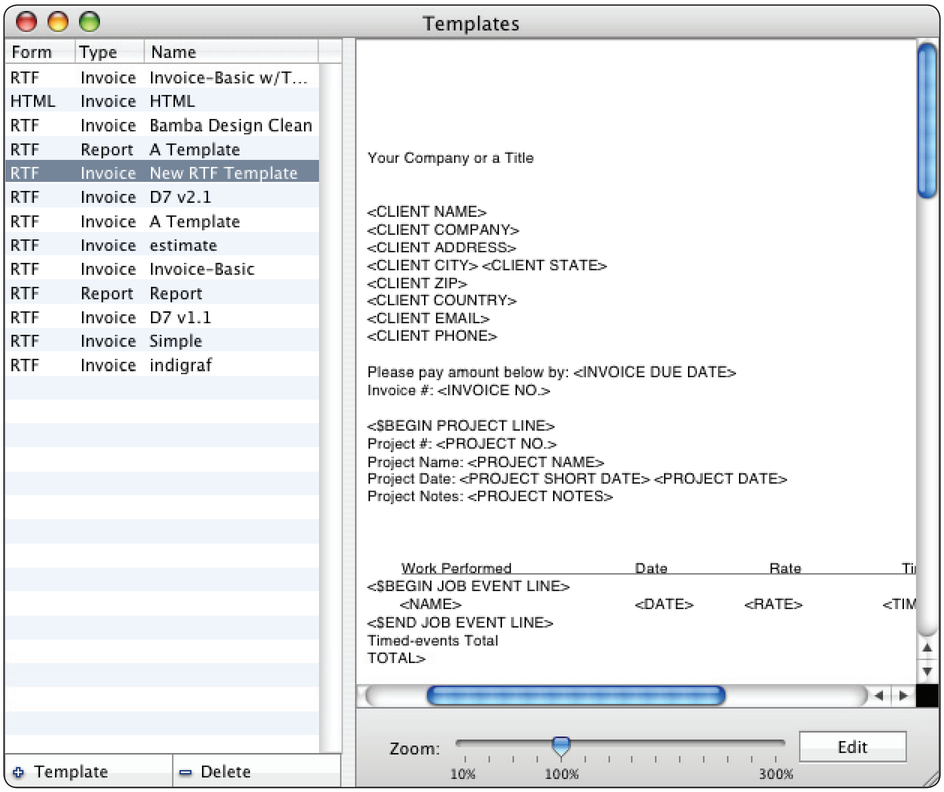
There is very little functional difference between invoice/estimate templates and report templates. They use the same tags and same structure, are stored in the same location and can be edited in the same fashion.

The main difference is that invoices and estimates, when generated, only include job events that have not already been invoiced, whereas reports will include all selected job events regardless of status. When you create a template, be sure to assign it the correct type so that it will be available for use in the right section of iBiz.

Additionally, report templates are restricted to RTF format (only invoice/estimate templates support HTML), and reports are not stored in iBiz after they are generated (as invoices and estimates are).

How do I add and delete templates?

To view your templates, open the template window by choosing Invoice>Show Templates, or by clicking the Invoice/Estimate button below the project list and choosing "Show Templates."



Your templates are listed along the left side of the template window, each one with its format (RTF or HTML), type (Invoice or Report), and name. Clicking a template will display a preview of that template to the right, which you can zoom in or out using the “Zoom” slider at the bottom right side of the template window.

To add a new template:

- Click the Template button at the bottom left corner of the template window. A sheet will appear with several options for the new template.
- Enter a name for the template, choose whether it is an invoice/estimate or report template, and choose whether you want to use Rich Text or HTML format.
- Click “OK” to add the new template to your list.

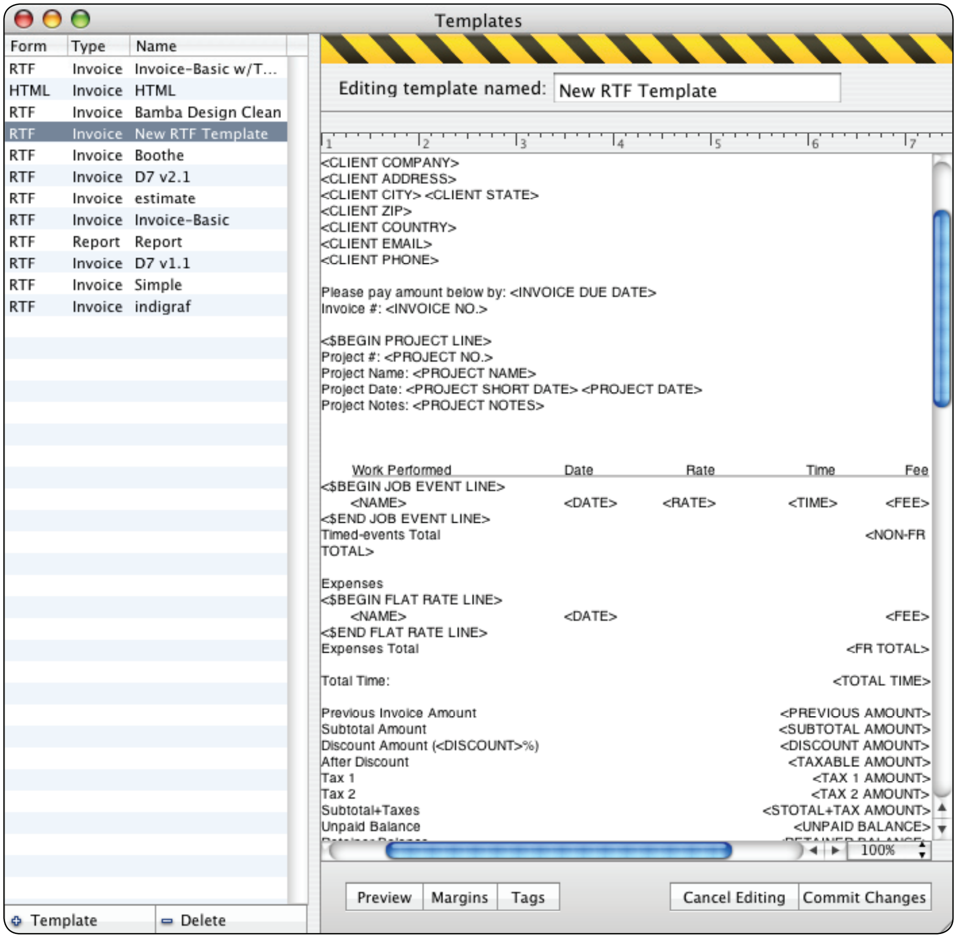
To delete a template:

Select the template and click the Delete button at the bottom of the templates window. A sheet will appear asking you to confirm that you want to permanently delete the template.

How do I edit templates in iBiz?

First, open the template window. Double-click a template, or select a template and click the “Edit” button in the bottom right corner of the template window to open the template in edit mode.

Yellow and black stripes appear at the top of the pane to remind you that you are currently editing the template. You can change the name of the template at the top of the edit pane. If it is an RTF template, the editor displays the text of the template; if it is HTML, you will see the HTML code.



To control formatting: Use the toolbar at the top of the edit pane to apply styles, set alignment, control spacing, and create lists. Use the ruler along the top of the pane to set tabs and indents. For more formatting options (including font settings), choose Invoice>Template Editing. Any formatting applied to a tag will be applied to the text that replaces it when the invoice, estimate, or report is generated.

To preview your changes: Click the "Preview" button. Your invoice, estimate, or report will be displayed as it would appear when applied to a project with sample client, project, and job event information. Click "Done" to return to the edit pane.

To edit margin settings: Click the "Margins" button. A sheet will appear in which you can enter values for the top, bottom, left, and right margins.

To view a list of available tags: Click the "Tags" button. A drawer will appear to the side of the template window containing all the tags that can be added to your template. For descriptions of each tag, see Chapter 4: Tag Reference in this manual.

When you are done editing the template, click the "Commit Changes" button at the bottom right of the template window to save your changes, or click "Cancel Editing" to discard them.

Can I use another program to edit my templates?

It is easy to use outside applications to edit your iBiz templates if you prefer another software package to iBiz's built-in template editor. Simply use copy and paste to move the text of any template back and forth between the iBiz template editor and an outside editor. TextEdit is usually best for editing RTF templates as iBiz uses Apple's RTF rendering engine. Use Safari to preview your HTML code for best results in iBiz.

To include images and other files with your HTML:

Browse to the following location in the Finder: ~/Library/Application Support/IGG Software/iBiz/Templates/ (the '~' indicates your user folder). Each ".biztemplate" file kept here is a bundle containing the following files:

- The RTFD or HTML file that contains the text of your template.
- Any image files or supporting documents that may be included in your template (if it is an HTML document).
- An "Attributes" file that contains additional info needed by iBiz to manage the template.

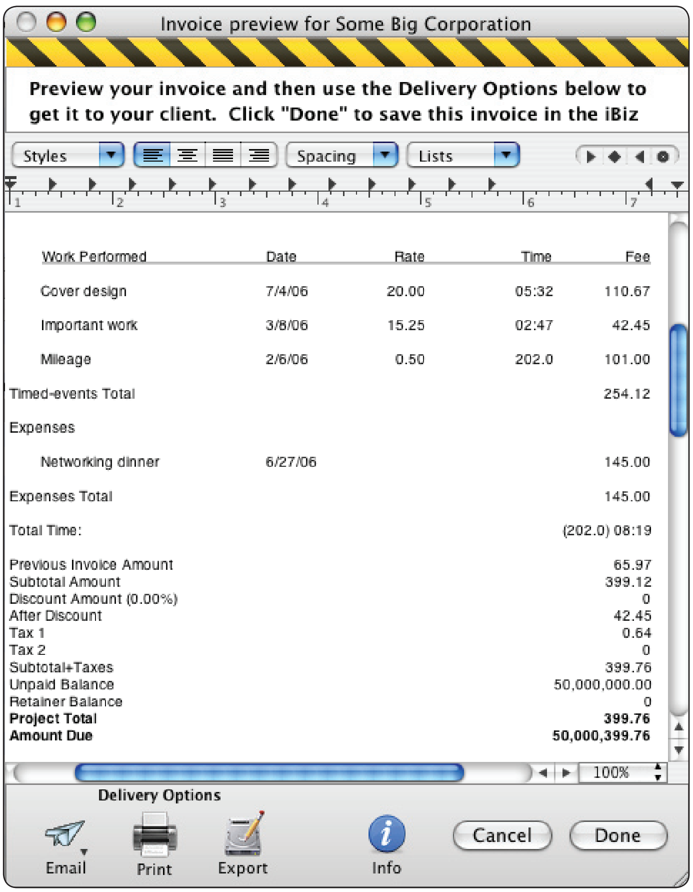
To view these files, Command-click on a template file and choose "Show Package Contents." Locate the bundle containing your HTML template, and copy any images, CSS files, or other included documents into it. You can now link to these files in your HTML code and have them appear in the template.

How do I generate invoices or estimates using my templates?

First, select one or more client(s) and project(s) to be invoiced (multiple clients/projects can be selected using Command-click). Go to Invoice>Create Invoice and choose a template, or click the Invoice/Estimate below the project list and choose a template from the drop-down menu.

If you are generating an invoice, all job events listed under the Work tab for the selected project(s) that are not marked closed already, and are not marked non-billable, will be included on the new invoice. Likewise, if you are generating an estimate, all job events listed under the Estimate tab for the selected project(s) that are not marked closed or non-billable will be included on the new estimate.

After choosing a template, a window will appear showing a preview of your invoice/estimate. The yellow and black stripes appearing across the top of the window are there to remind you that the invoice/estimate has not yet been saved to the billing section.



If you need to make any manual changes to the invoice/estimate, you can make them directly in the preview window. You can view additional information about the invoice/estimate by clicking the button at the bottom of the window.

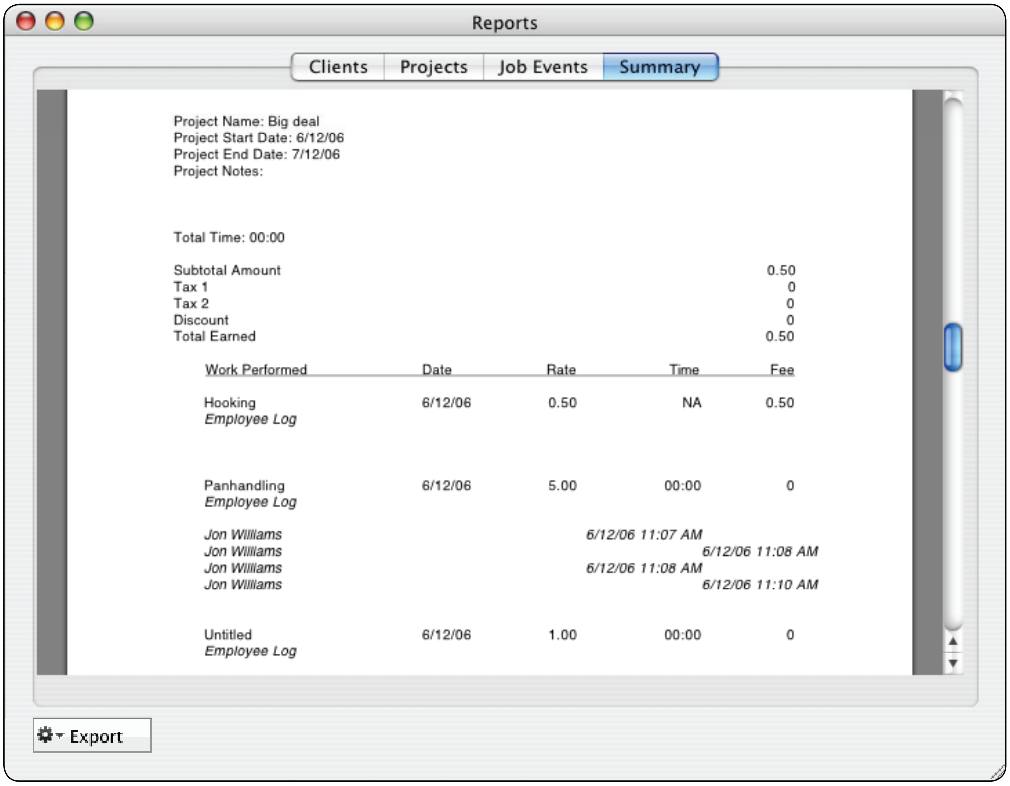
For more information about using invoices and estimates in iBiz, please refer to the iBiz User's Guide, available at http://www.iggsoftware.com/ibiz/iBiz_3_Manual.pdf

How do I generate reports using my templates?

In the main iBiz window, select the client or clients (using Command-click) for which you want to generate a report, then choose Client>Make Report or click the Report button on the toolbar.

A sheet will appear displaying each of the selected clients and their associated projects. Check individual projects to mark them for inclusion in the report. Checking a client will mark all its associated projects; clicking "Check/Uncheck All" will mark all displayed clients and projects. Choose a report template from the drop-down menu at the bottom of the sheet, then click "Generate Report."

The reports window that appears contains four tabs; click the Summary tab to display the report generated from the selected template.



To save the report to a PDF document, click the Export button and choose "PDF file." Choose a location for the new file and click "Save."

For more information about using reports in iBiz, please refer to the iBiz User's Guide, available at http://www.iggsoftware.com/ibiz/iBiz_3_Manual.pdf.

Chapter 3: Template Design

What is the difference between RTF and HTML templates?

Generally speaking, with RTF templates, what you see is what you get. The text you type into an RTF template, along with any images or formatting you apply, will be transferred directly to the invoice, estimate, or report that is generated using that template.

If you are already familiar with HTML coding (or have a WYSIWYG editor), you can author HTML templates with relative ease. The advantage to this method is that the incorporation of web formatting tools (such as tables and CSS) makes your templates highly customizable.

This chapter covers design principles for all templates using examples from RTF design. Our assumption is that if you are using HTML templates, you already have a thorough understanding of HTML design. To assist you in coding specifically for iBiz, special notes have been interspersed throughout this chapter with special considerations for HTML templates.

What is the basic structure of iBiz templates?

Regardless of whether you compose templates in RTF or HTML, tags are used to automatically insert data about your clients, projects, and job events. It is important to understand, however, that your templates must follow certain structural guidelines.

Templates are divided into sections according to content – for example, each one contains separate sections for client, project, and job event information. These sections are demarcated using tag lines, which follow a hierarchical [relationship](). Continue reading for more detailed descriptions of these concepts and terms.

What are tags?

Tags are text commands included in templates that provide special instructions to iBiz. Tags are always enclosed in angular brackets (e.g. <CLIENT NAME>) and act as placeholders for information that will be drawn from your iBiz data.

> **NOTE** *On HTML templates, tags must be entered as plain text so that they appear on the rendered document. To display the left and right angular brackets correctly, use "<" and ">" respectively. For example, the <CLIENT NAME> tag should appear as "<CLIENT NAME>" in your code.*

Each unique tag corresponds to a specific piece of information. When you generate an invoice, estimate, or report based on your template, iBiz looks up the information requested by each tag and places it in the template. Any formatting that was applied to the tag (including size, font, style, color, spacing, alignment, tabs, etc.) will be applied to the information taking its place.

To illustrate, suppose you write a template that looks like this:

```
Invoice #: <INVOICE NO.>
Date: <TODAY SHORT>

<CLIENT NAME>
<CLIENT ADDRESS>
<CLIENT CITY>, <CLIENT STATE>  <CLIENT ZIP>
```

NOTE *The included examples are based on RTF desgin; if you are working with HTML templates, consider the examples as if they reflected the rendered output of your HTML code.*

When used to generate an invoice, the output looks like this:

```
Invoice #: 103
Date: 8/15/06

Some Big Corporation
123 Main St.
Pleasantville, UT  55555
```

Tags can be used to place all sorts of information into your templates – please refer to Chapter 4: Tag Reference for a complete listing of tags and definitions.

What are tag lines?

Tag lines serve to demarcate the different sections of your template. They consist of "$BEGIN" and "$END" tags (see Which tags belong to which tag lines? for specific notation). The following tag lines are used in iBiz:

- *Client* – contains information about the client(s) selected when generating the invoice, estimate, or report.
- *Project* – contains information about the selected project(s).
- *Employee* – contains information about employees who contributed timed job events to the selected project.
- *Job event* – contains information about the selected timed job event(s).
- *Flat rate* – contains information about the selected flat rate and quantity job event(s). This line allows you to separate expenses from earnings on your projects.

- *Payment* – contains information about the selected payment job event(s).
- *Employee log* – contains information about invidivual employee times logged on the selected job event(s).

Unlike regular tags, tag lines do not display information on the form that is generated; they simply mark the different sections of the template. The main function they serve is to repeat the information contained between their <$BEGIN> and <$END> tags for each instance of that tag line's item.

NOTE *Tag lines are necessary for HTML templates as well. Even though the tag lines are not replaced with information when the invoice or estimate is generated, they must still appear in plain text. If they are in your HTML code but do not appear on the rendered document, iBiz will not process them and may display your project data incorrectly.*

For instance, the client line will repeat once for each client selected for inclusion in a report. The employee line will repeat for every employee that contributed time to the project being invoiced. This repetition prevents you from having to enter the same information multiple times on a template.

To illustrate, let's say you want to create a template that displays the project name and number for each included project. You will need to use the <PROJECT NAME> and <PROJECT NO.> tags, but if you simply place these on a template by themselves...

```
Project name:   <PROJECT NAME>
Project number: <PROJECT NO.>
```

...the resulting form will only display the name and number of the first project selected, not all of them:

```
Project name:  A Preview Project
Project number: 001
```

To make sure the tags are repeated for each included project, surround them with the <$BEGIN PROJECT LINE> and <$END PROJECT LINE> tags:

```
<$BEGIN PROJECT LINE>
Project name:  <PROJECT NAME>
Project number: <PROJECT NO.>
<$END PROJECT LINE>
```

This will result in the following output:

```
Project name:  A Preview Project
Project number: 001
Project name:  Another Project
Project number: 002
Project name:  One More Project
Project number: 003
```

Please note that not all tag lines must be used on every template; it is only important to include them if the template will be used to generate information on more than one of the item specified.

For example, if you are in the habit of invoicing only one client at a time, there is no need to include the <$BEGIN CLIENT LINE> and <$END CLIENT LINE> tags on your invoice template. Any client tags present will display information for the lone selected client.

It is very rare, however, that you will only want information on a single job event from a project, so most of your templates will include <$BEGIN JOB EVENT LINE> and <$END JOB EVENT LINE>.

How do tag lines relate to one another?

Tag lines also follow rules of hierarchy similar to the basic iBiz hierarchy (Client>Project>Job Event). This means that on your templates, the job event line should be nested inside the project line, and the project line should be nested inside the client line (tabs have been added for illustrative purposes and are not required):

```
<$BEGIN CLIENT LINE>
     <$BEGIN PROJECT LINE>
          <$BEGIN JOB EVENT LINE>
          <$END JOB EVENT LINE>
     <$END PROJECT LINE>
<$END CLIENT LINE>
```

Nested tag lines will repeat just as tags do – for example, if we add a tag to our code...

```
<$BEGIN CLIENT LINE>
     <$BEGIN PROJECT LINE>
          <$BEGIN JOB EVENT LINE>
               <NAME>
          <$END JOB EVENT LINE>
     <$END PROJECT LINE>
<$END CLIENT LINE>
```

...this template would produce a list of the names of all included job events for every selected project and client. The list would begin with the first job event in the first project for the first client, run through all job events in that project, then move on to the next project. After going through all job events in all projects for the first client, it would begin on the next client. This would continue until the list ends with the last job event in the last project for the last client.

Don't forget, however, that there are more tag lines than just clients, projects, and job events. The complete hierarchy for tag lines is as follows:

```
<$BEGIN CLIENT LINE>

     <$BEGIN PROJECT LINE>

           <$BEGIN EMPL. LINE>
           <$END EMPL. LINE>

           <$BEGIN JOB EVENT LINE>

                 <$BEGIN EMPL. LOG LINE>
                 <$END EMPL. LOG LINE>

           <$END JOB EVENT LINE>

           <$BEGIN FLAT RATE LINE>
           <$END FLAT RATE LINE>

           <$BEGIN PAYMENT LINE>
           <$END PAYMENT LINE>

     <$END PROJECT LINE>

<$END CLIENT LINE>
```

Please note that not all tag lines must be used on every template, but any tag lines that are used should follow the hierarchy outlined above. If the flat rate and/or payment lines are not included, the job event line will include information about flat rate and payment events from the project.

Which tags belong to which tag lines?

The following list is to provide a quick reference of tags associated with each line. Tags listed under "Misc." can be placed anywhere on the template and do not require a tag line to be used. Please refer to Chapter 4: Tag Reference for definitions of each tag.

Client:

<$BEGIN CLIENT LINE>
<$END CLIENT LINE>
<CL. FINAL BALANCE>
<CL. LAST PAYMENT>
<CL. STOTAL+TAX AMOUNT>
<CL. SUBTOTAL AMOUNT>
<CL. TAX 1 AMOUNT>
<CL. TAX 2 AMOUNT>
<CL. TAXABLE>
<CL. TOTAL AMOUNT>
<CL. TOTAL TAX>
<CL. TOTAL TIME>
<CL. TTL AFTER DISCOUNT>

<CLIENT ADDRESS>
<CLIENT CITY>
<CLIENT COMPANY>
<CLIENT COUNTRY>
<CLIENT EMAIL>
<CLIENT NAME>
<CLIENT PHONE>
<CLIENT STATE>
<CLIENT VAT>
<CLIENT ZIP>
<PREVIOUS AMOUNT>
<UNPAID BALANCE>

Project:

<$BEGIN PROJECT LINE>
<$END PROJECT LINE>
<DISCOUNT>
<DISCOUNT AMOUNT>
<FINAL BALANCE>
<FR TOTAL>
<NON-FR TOTAL>
<NON-PAYMENTS TOTAL>
<PAYMENTS TOTAL>
<PREVIOUS AMOUNT>
<PROJECT END DATE>
<PROJECT NAME>
<PROJECT NO.>
<PROJECT NOTES>
<PROJECT SHORT END DATE>

<PROJECT SHORT START DATE>
<PROJECT START DATE>
<RETAINER BALANCE>
<STOTAL+TAX AMOUNT>
<SUBTOTAL AMOUNT>
<TAX 1 AMOUNT>
<TAX 2 AMOUNT>
<TAXABLE AMOUNT>
<TIMED EMPLOYEES>
<TOTAL AMOUNT>
<TOTAL TAX>
<TOTAL TIME>
<TTL AFTER DISCOUNT>
<UNPAID BALANCE>

Employee:

<$BEGIN EMPL. LINE>
<$END EMPL. LINE>
<EMP. AVG. RATE>

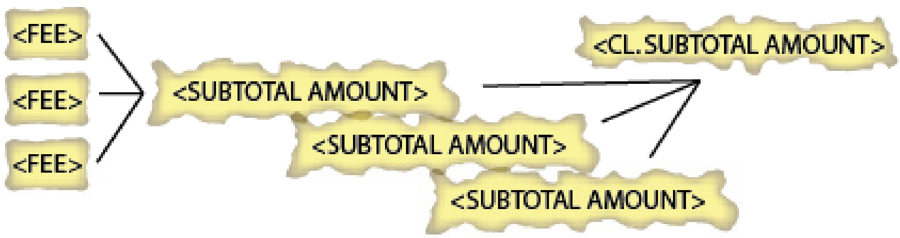
<EMP. COST>
<EMP. NAME>
<EMP. TIME>

Job event:	<$BEGIN JOB EVENT LINE> <$END JOB EVENT LINE> <DATE> <FEE> <NAME> <NOTES>	<QUANTITY> <RATE> <SSTIME> <TIME> <TIME D>
Flat rate (expense):	<$BEGIN FLAT RATE LINE> <$END FLAT RATE LINE> <DATE> <FEE>	<NAME> <NOTES> <RATE> <SSTIME>
Payment:	<$BEGIN PAYMENT LINE> <$END PAYMENT LINE> <DATE> <FEE>	<NAME> <NOTES> <RATE> <SSTIME>
Employee log:	<$BEGIN EMPL. LOG LINE> <$END EMPL. LOG LINE> <EMP. NAME>	<END> <START>
Misc. (no tag line):	<DAYS UNTIL DUE> <INVOICE DUE DATE> <INVOICE NO.> <INVOICE SHORT DUE DATE> <TODAY SHORT>	<TODAY LONG> <SUM TAX> <SUM TIME> <SUM TOTAL> <SUM UNPAID>

How are totals calculated?

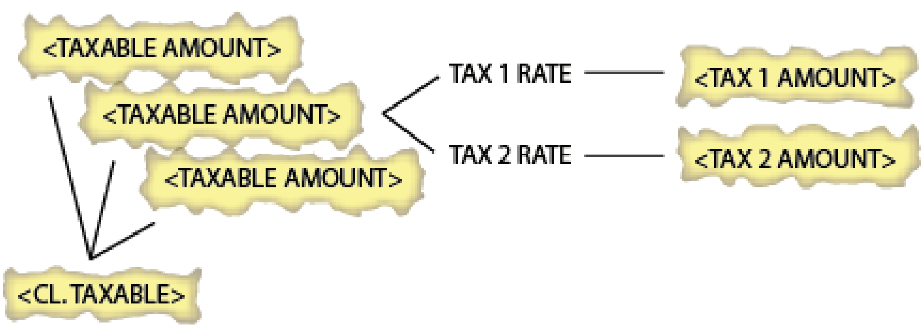
There are a number of tags used to display different totals on your templates. Understanding what each of these tags represents can be a little bit confusing. To help make sense of the process used to calculate the various totals (as well as the relationships between these tags), we have included several diagrams below.

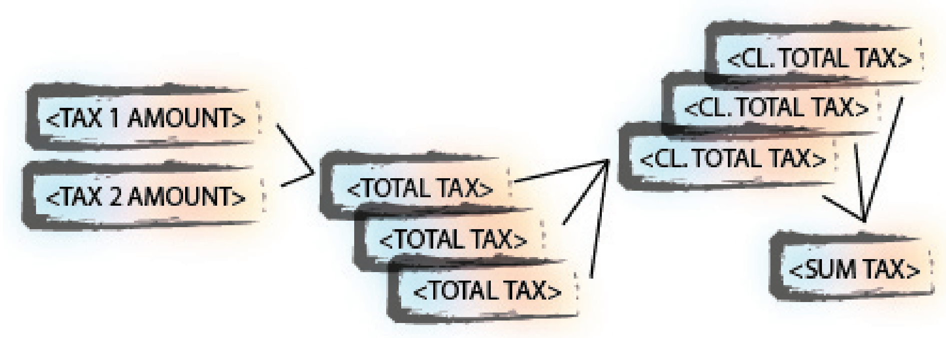
First, the subtotals are calculated from job event fees:



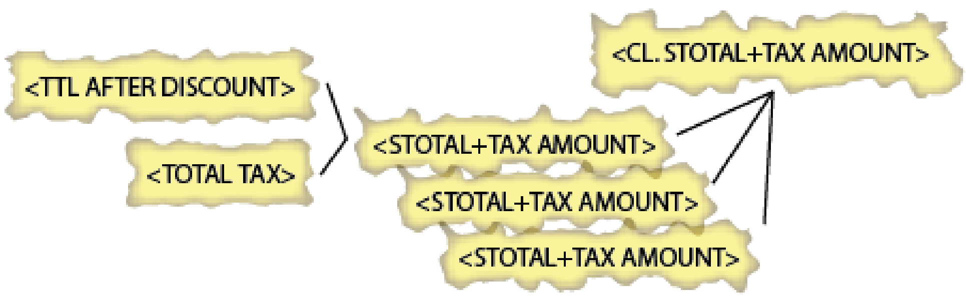
Second, project discounts are subtracted:

Third, taxes are calculated:

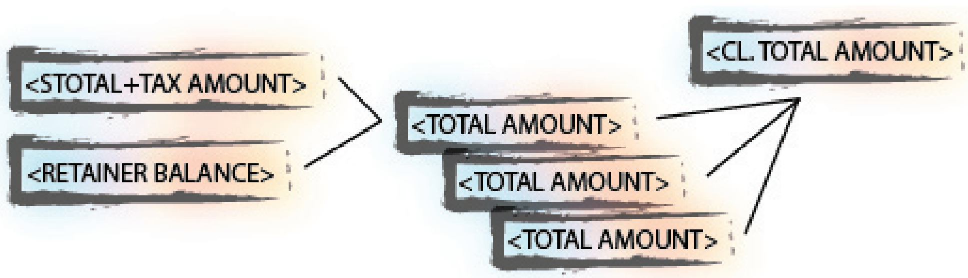




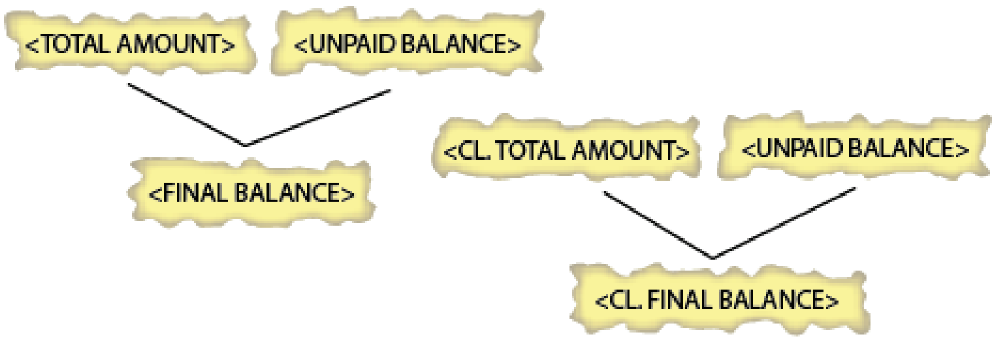
Fourth, the taxes are added in:



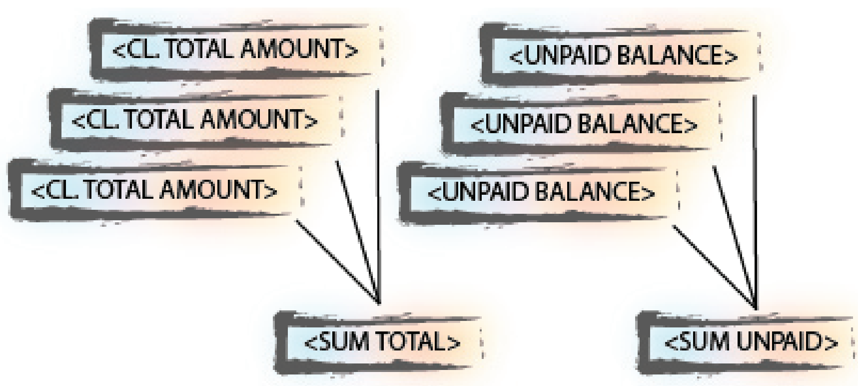
Fifth, retainer deposits are applied:



Finally, any outstanding balance (debit or credit) is added or subtracted:



For overall totals, client totals are simply added together:



How do I add images to my templates?

Images can be added to RTF templates by dragging and dropping the image file from the Finder onto the template, or via copy and paste. iBiz templates can use any graphic format supported by TextEdit, including TIF, PNG, JPG, and GIF.

Once added to your template, the original image file does not need to be kept on your hard drive. iBiz makes an inline copy of the image, which is saved directly in the RTF template file.

NOTE *Images can be placed in HTML templates, just as in any other HTML document, by using <img> tags. Any images placed in an HTML template should be kept in the same location as the template file itself. See* *Can I use another program to edit my templates?* *for more information.*

Chapter 4: Tag Dictionary

<$BEGIN CLIENT LINE>

Indicates the start of the client section of the template. Should not be used within any other tag line. All information enclosed between this tag and the <$END CLIENT LINE> tag will be repeated for each included client. See Chapter 3: Designing RTF Templates for more information about structuring your client tags. This tag is not replaced with text when the invoice/estimate or report is generated.

<$BEGIN EMPL. LINE>

Indicates the start of the employee section of the template. Should be used within the project line. All information enclosed between this tag and the <$END EMPL. LINE> tag will be repeated for each employee in the included project(s). See Chapter 3: Designing RTF Templates for more information about structuring your employee tags. This tag is not replaced with text when the invoice/estimate or report is generated.

<$BEGIN EMPL. LOG LINE>

Indicates the start of the employee log section of the template. Should be used within the job event line. All information enclosed between this tag and the <$END EMPL. LOG LINE> tag will be repeated for each employee log entry for the included project(s). See Chapter 3: Designing RTF Templates for more information about structuring your employee log tags. This tag is not replaced with text when the invoice/estimate or report is generated.

<$BEGIN FLAT RATE LINE>

Indicates the start of the flat rate job event section of the template. Should be used within the project line. All information enclosed between this tag and the <$END FLAT RATE LINE> tag will be repeated for each flat rate job event included. If the flat rate line is not included on the template, flat rate job events will be listed in the regular job event section instead. See Chapter 3: Designing RTF Templates for more information about structuring your job event tags. This tag is not replaced with text when the invoice/estimate or report is generated.

<$BEGIN JOB EVENT LINE>

Indicates the start of the job event section of the template. Should be used within the project line. All information enclosed between this tag and the <$END JOB EVENT LINE> tag will be repeated for each job event included (excluding payments). If a flat rate line has been included on the template, flat rate job events will not be listed in this section. See Chapter 3: Designing RTF Templates for more information about structuring your job event tags. This tag is not replaced with text when the invoice/estimate or report is generated.

<$BEGIN PAYMENT LINE>

Indicates the start of the payment job event section of the template. Should be used within the project line. All information enclosed between this tag and the <$END PAYMENT LINE> tag will be repeated for each payment job event included. See Chapter 3: Designing RTF Templates for more information about structuring your job event tags. This tag is not replaced with text when the invoice/estimate or report is generated.

<$BEGIN PROJECT LINE>

Indicates the start of the project section of the template. Should be used within the client line. All information enclosed between this tag and the <$END PROJECT LINE> tag will be repeated for each included project. See Chapter 3: Designing RTF Templates for more information about structuring your project tags. This tag is not replaced with text when the invoice/estimate or report is generated.

<$END CLIENT LINE>

Indicates the end of the client section of the template. All information enclosed between this tag and the <$BEGIN CLIENT LINE> tag will be repeated for each included client. See Chapter 3: Designing RTF Templates for more information about structuring your client tags. This tag is not replaced with text when the invoice/estimate or report is generated.

<$END EMPL. LINE>

Indicates the end of the employee section of the template. All information enclosed between this tag and the <$BEGIN EMPL. LINE> tag will be repeated for each employee in the included project(s). See Chapter 3: Designing RTF Templates for more information about structuring your employee tags. This tag is not replaced with text when the invoice/estimate or report is generated.

<$END EMPL. LOG LINE>

Indicates the end of the employee log section of the template. All information enclosed between this tag and the <$BEGIN EMPL. LOG LINE> tag will be repeated for each employee log entry for the included project(s). See Chapter 3: Designing RTF Templates for more information about structuring your employee log tags. This tag is not replaced with text when the invoice/estimate or report is generated.

<$END FLAT RATE LINE>

Indicates the end of the flat rate job event section of the template. All information enclosed between this tag and the <$BEGIN FLAT RATE LINE> tag will be repeated for each flat rate job event included. If the flat rate line is not included on the template, flat rate job events will be listed in the regular job event section instead. See Chapter 3: Designing RTF Templates for more information about structuring your job event tags. This tag is not replaced with text when the invoice/estimate or report is generated.

<$END JOB EVENT LINE>

Indicates the end of the job event section of the template. All information enclosed between this tag and the <$BEGIN JOB EVENT LINE> tag will be repeated for each job event included (excluding payments). If a flat rate line has been included on the template, flat rate job events will not be listed in this section. See Chapter 3: Designing RTF Templates for more information about structuring your job event tags. This tag is not replaced with text when the invoice/estimate or report is generated.

<$END PAYMENT LINE>

Indicates the end of the payment job event section of the template. All information enclosed between this tag and the <$BEGIN PAYMENT LINE> tag will be repeated for each payment job event included. See Chapter 3: Designing RTF Templates for more information about structuring your job event tags. This tag is not replaced with text when the invoice/estimate or report is generated.

<$END PROJECT LINE>

Indicates the end of the project section of the template. All information enclosed between this tag and the <$BEGIN PROJECT LINE> tag will be repeated for each included project. See Chapter 3: Designing RTF Templates for more information about structuring your project tags. This tag is not replaced with text when the invoice/estimate or report is generated.

<CL. FINAL BALANCE>

Client tag – displays the final balance owed by the client, totalling earnings from all included projects (including discounts, taxes, and retainers) and any oustanding balance. This is equal to the client's total amount plus/minus the unpaid balance. Not to be confused with <FINAL BALANCE>, which displays the final balance owed on a single project.

Related tags: <CL. TOTAL AMOUNT>, <UNPAID BALANCE>

<CL. LAST PAYMENT>

Client tag - displays the amount of the last payment received, as recorded in the client's billing section.

<CL. STOTAL+TAX AMOUNT>

Client tag - displays the amount owed across all of the client's projects, including all project earnings, discounts, and taxes, but excluding retainer deposits and any outstanding balance. This is equal to the sum of the "subtotal plust tax amount" for all included projects. Not to be confused with <STOTAL+TAX AMOUNT>, which displays the amount owed on a single project.

Related tags: <CL. TOTAL AMOUNT>

<CL. SUBTOTAL AMOUNT>

Client tag – displays the total earnings across all of the client's projects before any discounts, taxes, or retainer deposits are applied. This is equal to the sum of subtotal amounts for all included projects. Not to be confused with <SUBTOTAL AMOUNT>, which displays the total earnings for a single project.

Related tags: <CL. TTL AFTER DISCOUNT>

<CL. TAX 1 AMOUNT>

Client tag – displays the sum of Tax 1 amounts to be added to the client's subtotal (total earnings from all included projects). Not to be confused with <TAX 1 AMOUNT>, which displays the Tax 1 amount for a single project only.

Related tags: <CL. TAX 2 AMOUNT>

<CL. TAX 2 AMOUNT>

Client tag – displays the sum of Tax 2 amounts to be added to the client's subtotal (total earnings from all included projects). Not to be confused with <TAX 2 AMOUNT>, which displays the Tax 2 amount for a single project only.

Related tags: <CL. TAX 1 AMOUNT>

<CL. TAXABLE>

Client tag – displays the taxable earnings across all of the client's projects. This equals the sum of taxable earnings for all included projects. It is different from <CL. TTL AFTER DISCOUNT>, which includes the earnings from all job events included in the projects, regardless of whether they are taxable or not. Not to be confused with <TAXABLE AMOUNT>, which displays the taxable earnings for a single project.

Related tags: <CL. STOTAL+TAX AMOUNT>

<CL. TOTAL AMOUNT>

Client tag – displays the total amount owed across all of the client's projects, including all project earnings, discounts, taxes, and retainer deposits, but excluding any outstanding balance. This is equal to the sum of the total amounts for all included projects. Not to be confused with <TOTAL AMOUNT>, which displays the total amount owed on a single project, or <SUM TOTAL>, which displays the total amount owed across all clients and projects.

Related tags: <CL. FINAL BALANCE>

<CL. TOTAL TAX>

Client tag – displays the total amount of tax added to the client's projects, equal to the sum of <CL. TAX 1 AMOUNT> and <CL. TAX 2 AMOUNT>. Not to be confused with <TOTAL TAX>, which displays the total tax amount for a single project, or <SUM TAX>, which displays the total amount of tax across all clients and projects.

<CL. TOTAL TIME>

Client tag – displays the total time, quantity, and mileage for all corresponding job events included in the client's projects (this does not include flat rate or payment events). If only time information is present, the total time will be displayed. If quantity/mileage information is present, the total of these values will be displayed in parentheses in front of the total time, e.g. “(2.5) 11:34”. Not to be confused with <TOTAL TIME>, which displays the total time, quantity, and mileage for a single project, or <SUM TIME>, which displays the total time, quantity, and mileage across all clients and projects.

Related tags: <TIME>, <TIME D>, <QUANTITY>, <EMP. TIME>

<CL. TTL AFTER DISCOUNT>

Client tag – displays the amount owed across all of the client’s projects, including discounts but excluding taxes, retainer deposits, and any oustanding balance. This is equal to the sum of the “total after discount” for all included projects. Not to be confused with <TTL AFTER DISCOUNT>, which displays the amount owed on a single project.

Related tags: <CL. STOTAL+TAX AMOUNT>

<CLIENT ADDRESS>

Client tag – displays the client’s street address as specified in the “Street” field in Address Book.

<CLIENT CITY>

Client tag – displays the client’s city as specified in the “City” field in Address Book.

<CLIENT COMPANY>

Client tag – displays the name of the client's company as specified in the "Company" field in Address Book.

<CLIENT COUNTRY>

Client tag – displays the client's country as specified in the "Country" field in Address Book.

<CLIENT EMAIL>

Client tag – displays the client's email address as specified in the "Email" field in Address Book.

<CLIENT NAME>

Client tag – displays the name of the client as specified in the "First" and "Last" fields in Address Book.

<CLIENT PHONE>

Client tag – displays the client's phone number as specified in the "Phone" field in Address Book.

<CLIENT STATE>

Client tag – displays the client's state as specified in the "State" field in Address Book.

<CLIENT VAT>

Client tag – displays the client's VAT number as specified in a custom "Related Names" field in Address Book called "VAT" or "VAT #."

<CLIENT ZIP>

Client tag – displays the client's zip code as specified in the "ZIP" field in Address Book.

<DATE>

Job event tag – displays the job event's date as specified in the job event list.

<DAYS UNTIL DUE>

Invoices only – displays the number of days until payment is due for the invoice, as specified under the Advanced tab in iBiz Preferences. Must be used outside of all tag lines.

Related tags: *<INVOICE DUE DATE>*

<DISCOUNT>

Project tag – displays the rate of the discount applied to the project.

Related tags: [<DISCOUNT AMOUNT>]

<DISCOUNT AMOUNT>

Project tag – displays the total amount of the discount to be subtracted from the project's earnings.

Related tags: <DISCOUNT>, <TTL AFTER DISCOUNT>

<EMP. AVG. RATE>

Employee tag – displays the average rate earned by the employee on timed job events to which he or she contributed time, equal to the sum of the rates divided by the number of job events. Note that job events will only be counted if a log entry exists for that employee.

Related tags: <EMP. TIME>, <EMP. COST>, <RATE>

<EMP. COST>

Employee tag – displays the total cost (fee) of the employee based on the time and rate for all included timed job events to which the employee contributed. Note that job events will only be counted if a log entry exists for that employee.

Related tags: <EMP. TIME>, <EMP. AVG. RATE>, <TIME>, <TIME D>, <RATE>, <FEE>

<EMP. NAME>

Employee tag – displays the name of the employee. Can be used in both the employee line and employee log line sections of the template. Will only display names of employees who logged time on timed job events.

<EMP. TIME>

Employee tag – displays the total time for all included timed job events to which the employee contributed. Note that job events will only be counted if a log entry exists for that employee.

Related tags: <EMP. AVG. RATE>, <EMP. COST>, <TIME>, <TIME D>, <TOTAL TIME>, <CL. TOTAL TIME>

<END>

Employee log tag – displays the end time of the employee's log. Will only display results for timed job events.

Related tags: <START>

<FEE>

Job event/flat rate/payment tag – displays the total earnings for the job event. For timed events, this equals the event's time multiplied by its rate. For flat rate and payment events, it is equal to the rate. For quantity and mileage events, it equals the quantity/mileage times the event's rate.

Related tags: <TIME>, <TIME D>, <QUANTITY>, <RATE>, <EMP. COST>, <NON-FR TOTAL>, <FR TOTAL>, <PAYMENTS TOTAL>, <SUBTOTAL AMOUNT>

<FINAL BALANCE>

Project tag – displays the final balance owed on a project, including discounts, taxes, retainer deposits, and any outstanding balance (whether debt or deposit). This is equal to the project's total amount plus/minus the unpaid balance. Not to be confused with <CL. FINAL BALANCE>, which displays the final balance owed by a client across all included projects.

Related tags: <TOTAL AMOUNT>, <UNPAID BALANCE>

<FR TOTAL>

Project tag – displays the sum of earnings (fees) from all flat rate job events included in the project. This does not include discounts, taxes, retainer deposits, or any outstanding balance.

Related tags: <FEE>, <NON-FR TOTAL>, <PAYMENTS TOTAL>

<INVOICE DUE DATE>

Invoices only – displays the due date of the invoice in long format. This is calculated using the current date and the number of days before the invoice is due (as specified under the Advanced tab in iBiz Preferences). Must be used outside of all tag lines.

Related tags: *<INVOICE SHORT DUE DATE>*, *<TODAY LONG>*, *<TODAY SHORT>*, *<DAYS UNTIL DUE>*

<INVOICE NO.>

Invoices/estimates only – displays the number of the invoice or estimate as specified under the Advanced tab in iBiz Preferences. Must be used outside of all tag lines.

<INVOICE SHORT DUE DATE>

Invoices only – displays the due date of the invoice in short format. This is calculated using the current date and the number of days before the invoice is due (as specified under the Advanced tab in iBiz Preferences). Must be used outside of all tag lines.

Related tags: *<INVOICE DUE DATE>*, *<TODAY SHORT>*, *<TODAY LONG>*, *<DAYS UNTIL DUE>*

<NAME>

Job event/flat rate/payment tag – displays the job event's name as specified in the job event list.

<NON-FR TOTAL>

Project tag – displays the sum of earnings (fees) from all timed, quantity, mileage, and payment job events included in the project. This does not include discounts, taxes, retainer deposits, or any outstanding balance.

Related tags: <u><FEE></u>, <u><FR TOTAL></u>, <u><PAYMENTS TOTAL></u>, <u><NON-PAYMENTS TOTAL></u>

<NON-PAYMENTS TOTAL>

Project tag – displays the sum of earnings (fees) from all timed, flat rate, quantity, and mileage job events included in the project. This does not include payments, discounts, taxes, retainer deposits, or any outstanding balance.

Related tags: <u><FEE></u>, <u><FR TOTAL></u>, <u><NON-FR TOTAL></u>, <u><PAYMENTS TOTAL></u>

<NOTES>

Job event/flat rate/payment tag – displays any notes associated with the job event as specified in the job event list.

<PAYMENTS TOTAL>

Project tag – displays the sum of payments (fees) from all payment job events included in the project.

Related tags: <FEE>, <NON-PAYMENTS TOTAL>, <NON-FR TOTAL>, <FR TOTAL>

<PREVIOUS AMOUNT>

Client tag – displays the final balance of the last invoice or estimate generated for the client. Can be used in both the project line and client line sections of the template. This information is not used in any calculations performed by other tags.

Related tags: <FINAL BALANCE>

<PROJECT END DATE>

Project tag – displays the due date of the project, as specified in the project list, in long format.

Related tags: <PROJECT START DATE>, <PROJECT SHORT START DATE>, <PROJECT SHORT END DATE>

<PROJECT NAME>

Project tag – displays the project's name as specified in the project list.

<PROJECT NO.>

Project tag – displays the project's number as specified in the project list.

<PROJECT NOTES>

Project tag – displays any notes associated with the project, as specified in the project list.

<PROJECT SHORT END DATE>

Project tag – displays the due date of the project, as specified in the project list, in short format.

Related tags: <PROJECT SHORT START DATE>, <PROJECT START DATE>, <PROJECT END DATE>

<PROJECT SHORT START DATE>

Project tag – displays the start date of the project, as specified in the project list, in short format.

Related tags: <PROJECT SHORT END DATE>, <PROJECT START DATE>

<PROJECT START DATE>

Project tag – displays the start date of the project, as specified in the project list, in long format.

Related tags: <PROJECT END DATE>, <PROJECT SHORT START DATE>

<QUANTITY>

Job event tag – displays the quantity or mileage of the job event (must be a quantity or mileage event) as specified in the job event list. Please note that the <TIME> tag also displays the quantity/mileage value if present, however that tag displays it in parentheses before an empty time value, e.g. "(10.2) 00:00."

Related tags: <TIME D>, <RATE>, <FEE>, <TOTAL TIME>, <CL. TOTAL TIME>, <EMP. TIME>

<RATE>

Job event/flat rate/payment tag – displays the rate of the job event as specified in the job event list.

Related tags: <TIME>, <TIME D>, <QUANTITY>, <FEE>

<RETAINER BALANCE>

Project tag – displays the total of any deposits made against the project under Project>Show Retainer Activity.

Related tags: <TOTAL AMOUNT>, <CL. TOTAL AMOUNT>

<SSTIME>

Job event/flat rate/payment tag – displays the start and end times of the job event, as specified under the Workday pane of the info drawer. Only the start time will be displayed for job events that are not timed events.

<START>

Employee log tag – displays the start time of the employee's log. Will only display results for timed job events.

Related tags: <END>

<STOTAL+TAX AMOUNT>

Project tag – displays the amount owed on the project, including discounts and taxes, but excluding retainer deposits and any oustanding balance. This is equal to the total after discount plus tax amounts. Not to be confused with <CL. STOTAL+TAX AMOUNT>, which displays the amount owed across all of the client's projects.

Related tags: <TTL AFTER DISCOUNT>, <TAX 1 AMOUNT>, <TAX 2 AMOUNT>, <TOTAL AMOUNT>

<SUBTOTAL AMOUNT>

Project tag – displays the total earnings of the project (including markup) before any discounts, taxes, retainer deposits, or outstanding balances are applied. This is equal to the sum of fees for all job events included in the project. Not to be confused with <CL. SUBTOTAL AMOUNT>, which displays the total earnings across all of the client's projects.

Related tags: <FEE>, <TTL AFTER DISCOUNT>

<SUM TAX>

Displays the total amount of tax added to all projects for all included clients, equal to the sum of <CL. TOTAL TAX> for all clients. Not to be confused with <TOTAL TAX>, which displays the total tax amount for a single project. Must be used outside of all tag lines.

<SUM TIME>

Displays the total time, quantity, and mileage for all job events across all included projects and clients (this does not include flat rate or payment events). If only time information is present, the total time will be displayed. If quantity/mileage information is present, the total of these values will be displayed in parentheses in front of the total time, e.g. "(2.5) 11:34". Not to be confused with <TOTAL TIME>, which displays the total time, quantity, and mileage for a single project; or <CL. TOTAL TIME>, which displays the total time, quantity, and mileage for a single client. Must be used outside of all tag lines.

<SUM TOTAL>

Displays the total amount owed across all clients and projects, including all earnings, discounts, taxes, and retainer deposits, but excluding clients' outstanding balances. This is equal to the sum of the total amounts for all included clients. Not to be confused with <TOTAL AMOUNT>, which displays the total amount owed on a single project, or <CL. TOTAL AMOUNT>, which displays the total amount owed by a single client. Must be used outside of all tag lines.

<SUM UNPAID>

Displays the total amount of outstanding balances (whether debt or deposit) across all clients' accounts as indicated in the billing section. Not to be confused with <UNPAID BALANCE>, which displays the oustanding balance for a single client or project. Must be used outside of all tag lines.

<TAX 1 AMOUNT>

Project tag – displays the total amount of Tax 1 to be added to the project's earnings. Not to be confused with <CL. TAX 1 AMOUNT>, which displays the total Tax 1 amount for all of the client's projects.

Related tags: <TAX 2 AMOUNT>, <TOTAL TAX>

<TAX 2 AMOUNT>

Project tag – displays the total amount of Tax 2 to be added to the project's earnings. Not to be confused with <CL. TAX 2 AMOUNT>, which displays the total Tax 2 amount for all of the client's projects.

Related tags: <TAX 1 AMOUNT>, <TOTAL TAX>

<TAXABLE AMOUNT>

Project tag – displays the taxable earnings of the project. This equals the sum of earnings from all taxable job events included in the project, including any discount that has been applied. This is different from <TTL AFTER DISCOUNT>, which includes the earnings from all job events included in the project, regardless of whether they are taxable or not. Not to be confused with <CL. TAXABLE>, which displays the taxable earnings across all of the client's projects.

Related tags: <DISCOUNT AMOUNT>, <STOTAL+TAX AMOUNT>

<TIME>

Job event tag – displays the job event's time as specified in the job event list. If the job event is a quantity or mileage event, it will display the quantity/mileage in parentheses before an empty time value, e.g. "(10.2) 00:00".

Related tags: <TIME D>, <QUANTITY>, <RATE>, <FEE>, <TOTAL TIME>, <CL. TOTAL TIME>, <EMP. TIME>

<TIME D>

Job event tag – displays the job event's time as specified in the job event list in decimal format (to two decimal places). If the job event is a quantity or mileage event, it will display the quantity/mileage in parentheses before an empty time value, e.g. "(10.2) 00.00".

Related tags: <TIME>, <QUANTITY>, <RATE>, <FEE>, <TOTAL TIME>, <CL. TOTAL TIME>, <EMP. TIME>

<TIMED EMPLOYEES>

Project tag – displays a list of the names of all employees who contributed timed job events to the project.

<TODAY LONG>

Displays the current date in long format. Must be used outside of all tag lines.

Related tags: <TODAY SHORT>

<TODAY SHORT>

Displays the current date in short format. Must be used outside of all tag lines.

Related tags: <TODAY LONG>

<TOTAL AMOUNT>

Project tag – displays the total amount owed on the project, including discounts, taxes, and retainer deposits, but excluding any outstanding balance. This is equal to the "subtotal plus tax amount" minus the retainer balance. Not to be confused with <CL. TOTAL AMOUNT>, which displays the total amount owed for all of a single client's projects, or <SUM TOTAL>, which displays the total amount owed across all clients and projects.

Related tags: <STOTAL + TAX AMOUNT>, <RETAINER BALANCE>, <FINAL BALANCE>

<TOTAL TAX>

Project tag – displays the total amount of tax to be added to the project's earnings, equal to the sum of <TAX 1 AMOUNT> and <TAX 2 AMOUNT>. Not to be confused with <CL. TOTAL TAX>, which displays the total tax amount for all of a client's projects, or <SUM TAX>, which displays the total amount of tax across all clients and projects.

<TOTAL TIME>

Project tag – displays the total time, quantity, and mileage for all corresponding job events included in the project (this does not include flat rate or payment events). If only time information is present, the total time will be displayed. If quantity/mileage information is present, the total of these values will be displayed in parentheses in front of the total time, e.g. "(2.5) 11:34". Not to be confused with <CL. TOTAL TIME>, which displays the total time, quantity, and mileage across all projects for a single client, or <SUM TIME>, which displays the total time, quantity, and mileage across all clients and projects.

Related tags: <TIME>, <TIME D>, <QUANTITY>, <EMP. TIME>

<TTL AFTER DISCOUNT>

Project tag – displays the amount owed on the project, including discounts but excluding taxes, retainer deposits, and any oustanding balance. This is equal to the subtotal amount minus the discount amount. Not to be confused with <CL. TTL AFTER DISCOUNT>, which displays the amount owed across all of the client's projects.

Related tags: <SUBTOTAL AMOUNT>, <DISCOUNT AMOUNT>, <STOTAL+TAX AMOUNT>

<UNPAID BALANCE>

Client tag - displays the amount of any outstanding balance (whether debt or deposit) on the client's account as indicated in the billing section. Can be used in both the project line and client line sections of the template. This amount is added to/subtracted from the <TOTAL AMOUNT> or <CL. TOTAL AMOUNT> when calculating <FINAL BALANCE> or <CL. FINAL BALANCE>, respectively. Displaying this tag on both the project and client lines will not cause any duplication in calculation; the outstanding balance will only be totaled with the client's total amount once to produce the client's final balance, regardless of how many projects it has been displayed under. Not to be confused with <SUM UNPAID>, which displays the total outstanding balance across all clients and projects.

Chapter 5: Frequently Asked Questions

How do I separate expenses or payments from earnings on a template?

Expenses should be tracked in iBiz as flat rate events, which are displayed in the flat rate line on invoices, estimates, and reports. Payments are displayed on the payments line. For information about which tags to use to display expense and payment information, see Which tags belong to which tag lines?

Can I use tables in my templates?

Yes, you can! Tables can come in handy when you want to keep your text columns aligned vertically. The built-in template editor in iBiz does not include tools for creating or editing them, however. Use an external editor like TextEdit to add or modify tables, or write your template in HTML and add tables that way.

How do I use templates with iBiz Server?

If you are using an iBiz network, all templates are stored centrally on the computer running iBiz Server. Any connected user can edit templates using iBiz Client; any changes saved to a template will automatically be reflected for the other users to see.

How do I backup or restore my iBiz templates?

Your iBiz templates are stored in the following location: ~/Library/Application Support/IGG Software/iBiz/Templates/ (the '~' denotes your user folder). To backup your templates, simply make a copy of this folder on another drive. To restore your templates from a backup, copy them back into this location and restart iBiz.

You can also backup your templates by opening them in the iBiz template editor, copying the text into an external editor, and saving the file as an RTF or HTML document. Likewise, you can restore templates via copy/paste in similar fashion. Images and other files linked through HTML code will not be preserved using this method.

Where can I download or share templates?

Additional templates are available for download from our website at:
http://www.iggsoftware.com/ibiz/downloads.php#templates

To install a downloaded template, place it in the following folder on your hard drive: ~/Library/Application Support/IGG Software/iBiz/Templates/ (the '~' denotes your user folder).

If you would like to share your template design with other iBiz users, please send an email to info@iggsoftware.com with the template attached in RTF, HTML, or "biztemplate" format, and we will consider posting it on our website!

Where can I find help or get additional support?

In addition to this manual, we offer free technical assistance via email and an interactive Web user forum. Please feel free to contact us at any time; we will be sure to respond to your inquiry in a timely and effective manner.

- Technical support: support@iggsoftware.com
- General inquiries: info@iggsoftware.com
- Bug reports: bugs@iggsoftware.com
- Feature requests: feature_requests@iggsoftware.com
- Knowledge base: http://www.iggsoftware.com/kb/
- User forums: http://www.iggsoftware.com/forums/

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iBiz 3 Template Manual authored by Jon Williams
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