Index to Using Time and Billing for Windows

The Index lists the Help Topics describing how to use Time and Billing for Windows.

To Learn to Use the Help System press F1 or Select How to Use Help from the Help Menu.

Menu Items

- File
- Edit
- Setup
- Payments
- Help

What is a TimeCard

Entering A TimeCard

TimeKeeper	Client	Task
Dates From	Dates To	
Hours	Rate	
Charge		
Comments		
Tax Rate	Tax Amount	Charge With Tax
Add	Update	Delete
Clear	Get	
TimerOn	TimerOff	

File Menu

As in most Microsoft Windows Applications, File Creation and Print Information is store under the File Menu.   The Exit/Quit Command is also found here.

Billing Company Information

Print a Bill

Print this TimeCard

Printer Setup

Exit Time and Billing

Edit Menu

To Cut, Copy and/or Paste and Numbers beteweeen Time and Billing and Other Windows applications, select the text with the Cursor and pull down the Edit Menu.

Cut

Copy

Paste

Setup Menu

To be able to enter TimeCards, you must enter Client, Task and TimeKeeper information for your company or firm. These proceedures must be performed when you first install Time and Billing for Windows and then whenever Client, Task and TimeKeeper information changes. You may make these changes at anytime.

Client Setup

Task Setup

TimeKeeper Setup

Payments Menu

Use the Payments Menu to make and track entries that effect Client Balances.

Make Payments

Accounts Receivable List

Help Menu

Use this Menu to discover information about Time and Billing for Windows

How to Use Time and Billing	Calls this Help System
How to Use Help	Call the Standard Microsoft Windows Help System
Future Upgrades	

About Time and Billing for Windows

Billing Company Information

When you start Time and Billing for Windows it is absolutely imperative you complete the fields on this screen, but you may change it later as the need arises.

Company Name:	Your Name or Company Name that will appear on Bills and Invoices
Address1:	The First Line of your Company's address (will not print if left blank)
Address2:	The Second Line of your Company's address (will not print if left blank)
City, State, Zip Code:	The Third Line of your Company's address (will not print if left blank)
Phone:	Your Company's phone number (will not print if left blank)
Next Invoice #:	The Next Invoice # that will be printed (***this number must be entered***)

Print A Bill

You are presented with a list box populated with all Clients. Select the appropriate Client and click OK. An Invoice will then be printed. You will then be asked if the bill printed correctly. Check it and if you are satisfied, say Yes and Client Balances and applicable Charges will be updated. If not click No and go back and make corrections.

Print This TimeCard

This option prints the TimeCard or Charge displayed on your Monitor. If your firm has a number of TimeKeepers, you may want to distribute blank copies of this screen to each TimeKeeper and have them submit them completed to the Time and Billing for Windows operator.

Printer Setup

Allows the user to change Printers and Printer Configurations from within Time and Billing for Windows

Exit Time and Billing

Quits Time and Billing for Windows. You will not be able to Quit if an active TimeCard is on the screen, it must be Added, Deleted, Updated or Cleared first.

Cut, Copy, Paste

To copy and paste or cut and past text:

1 Select the text.
2 To copy text, choose Copy from the edit menu.
3 Move the insertion point where you want the text to appear
Or select the text you want to replace.
4 From the Edit menu, choose Paste.

Client Setup

Before a TimeCard for a Client can be entered, the Client must be setup.

Client Name: The Client or Company Name that will appear on Bills and Invoices
Address1: The First Line of your Client's address (will not print if left blank)
Address2: The Second Line of your Client's address (will not print if left blank)
City: The Client's City
State: The Client's State
Zip Code: The Client's Zip Code
Phone Number: The Client's Phone Number
Default Biller: Which TimeKeeper generally workws with this Client
Default Rate: The Standard Hourly Rate for this Client
Balance: The Present Balance for this Client, (Time and Billing will keep this figure up to date after it is initally entered)

Add Push Button Stores a New Client in the System
Update Push Button Stores Changes to this Client in the System
Delete Push Button Deletes this Client from the System
Clear Push Button Removes Client Infromation from the Screen but leaves the Client file unchanged.
Done Push Button Exits the Client Setup Screen.

Client List Box Select from this List to View, Change or Delete Existing Clients

Task Setup

Before a TimeCard referencing a Task can be entered, the Task must be setup.

Task Name: The Task Name that will be referenced on a TimeCard.
Default Rate: The Standard Hourly Rate for this Task

Add Push Button Stores a New Task in the System
Update Push Button Stores Changes to this Task in the System
Delete Push Button Deletes this Task from the System
Clear Push Button Removes Task Information from the Screen but leaves the Task file unchanged.
Done Push Button Exits the Task Setup Screen.

Task List Box Select from this List to View, Change or Delete Existing Task

TimeKeeper Setup

Before a TimeCard referencing a TimeKeeper can be entered, the TimeKeeper must be setup.

TimeKeeper Name: The TimeKeeper Name that will be referenced on a TimeCard.
Default Rate: The Standard Hourly Rate for this TimeKeeper

Add Push Button Stores a New TimeKeeper in the System
Update Push Button Stores Changes to this TimeKeeper in the System
Delete Push Button Deletes this TimeKeeper from the System
Clear Push Button Removes TimeKeeper Information from the Screen but leaves the TimeKeeper file unchanged.
Done Push Button Exits the TimeKeeper Setup Screen.

TimeKeeper List Box Select from this List to View, Change or Delete Existing TimeKeeper

Make Payments

Enter Transactions such as payments, retainers and credits through this dialog box.

To Enter a Payment:

1. Select a Client from the Client List Box
2. All previous transactions by this Client will be displayed along with the Clients Balance to date (a credit Balance will be a negative amount).
3. Enter a payment/transaction in the Payment Amount Field, the Pay Date and click Add.
   Click Clear if you make a mistake.
4. Repeat steps 1. through 3. until all payments have been entered and then Click Done.

Accounts Receivable List
This report will display a list of clients, their phone numbers and respecive balances.

From the file menu you can Print the Account Recievable List as well as Exit the display list.

Future Upgrades

An infromation screen describing what you will find in future registered versions of Time and Billing for Windows.

About Time and Billing for Windows

A disclaimer, copyright and version screen.

TimeKeeper

A TimeKeeper is the way Time and Billing for Windows referes to your firms: Professionals, Lawyers, Accountants, Contractors, Programmers and/or anyone else that bills charges.

Client
A Client is the way Time and Billing for Windows referes to your firm's Clients, Customers and/or Patrons.

Task A Task is the way Time and Billing for Windows refers to your firm's billable Jobs, Tasks and/or Products.

Charge Dates

From Date The Date the Task began (default is today's date)**To Date** The Date the Task was completed (default is today's date)

Hours
The number of Hours taken to peform the Task (in Decimals). Hours are not applicable for Flat Rate Charges.

Rate The Hourly Rate used to calculate a charge.   Can be the Default TimeKeeper, Client or Task Rate or a User Specified Rate.   Rate is not applicable for Flat Rate Charges.

Charge A Calculated field that specifies the amount to be charged for a specific task. Hours are multiplied by Hourly Rate. If Flat Rate has been selected, the user must manually enter a rate.

Comments A Description or Comments on a specific TimeCard that will appear on a bill or invoice.

Tax Rate

The Percentage that will be multiplied by the Charge Amount when the Charge is Taxable. (Default is 5%).

Tax Amount The derived Tax Rate that will be multiplied by the Charge Amount produce this Tax Amount,

Charge With Tax The Gross Charge Amount for a TimeCard. The Charge Amount plus the Tax Amount (if the Taxable Checkbox is On).

Getting, Enterting, Updating, Deleting and Clearing TimeCards

Add Push Button Stores a New TimeCard to System
Update Push Button Stores Changes to a TimeCard in the System
Delete Push Button Deletes a TimeCard from the System
Clear Push Button Removes TimeCard Information from the Screen but leaves the Time file unchanged.
Get Push Button Brings up a List Box populated with past TimeCards, select on and TimeCard detail will be displayed.

Timer

The Timer is a feature of Time and Billing for Windows that allows you to interactively track the amount of time spent on a particular TimeCard.   To use this feature create a TimeCard that with TimeKeeper, Client and Task Information filled in and select a Hourly Rate.   Click the **TimeOn** Button and you will see the Hours and Charge Amount Update every second as Time goes on.

Time and Billing for Windows can be minimized and other applications can be run while Time and Billing for Windows   continues to track the time spent.   For Instance, a attorney might run the Timer in the background while he or she works on a brief using a Windows Word Processor.

To Turn off the Timer click the **TimeOff** Pushbutton.

TimeCard

A TimeCard is a metaphor used by Time and Billing for Windows to refer to individual charges made with the application. For instance an Accountant might use Time and Billing for Windows to enter a 2 hour TimeCard entry for the preparation of a Tax Return.

When Time and Billing for Windows is started the user is presented with the TimeCard entry screen. By selecting TimeKeeper, Client, Task, Dates, Hours and Rates and then clicking Add, a TimeCard is entered.

Time and Billing for Windows is not limited to only time entries, tasks can be setup to represent parts, expenses, travel and other items used by the TimeKeeper that must be billed to the Client. Many of these items may be taxable and should be mark as such by clicking the Taxable button.