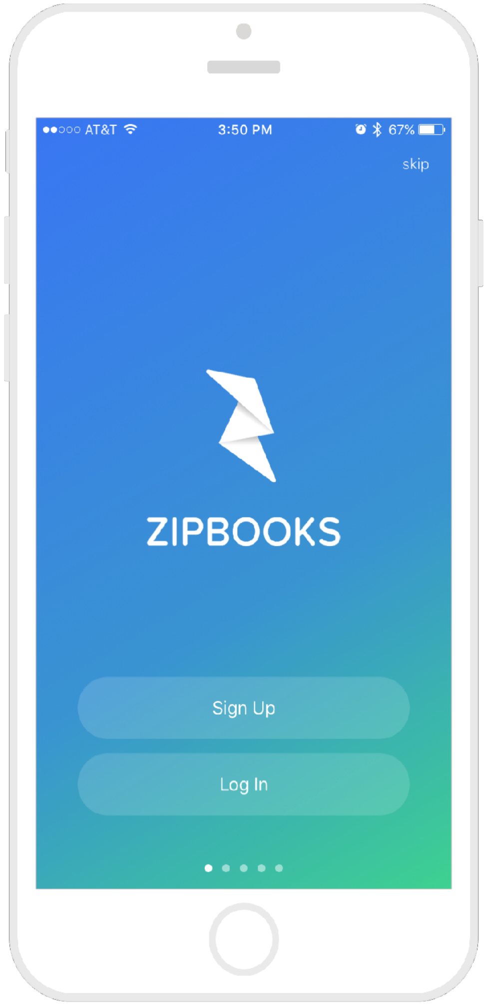
ZIPBOOKS

iPhone User Guide

USING ZIPBOOKS ON YOUR IPHONE



There is a lot going on in the ZipBooks iPhone app, so we built a user guide to help get you started. Enjoy!

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DASHBOARD

Get a quick overview of the health of your business!

Billings and collections

The first thing you'll see at the top of your dashboard is a graph labeled **Billings and Collections**. This shows the amount you have billed and collected on a month-to-month basis.

Monthly revenue

The number directly below Billings and Collections records your total revenue for the last 12 months.

Active customers

Scroll down to see your number of Active Customers. These are customers that have paid you and that you have not archived in the web version of the app.

Customer concentration

This shows you which of your customers generate the most revenue. The graph will change as different customers pay you different amounts.

Accounts receivable

Accounts Receivable shows the amount of money still owed to you by your customers.

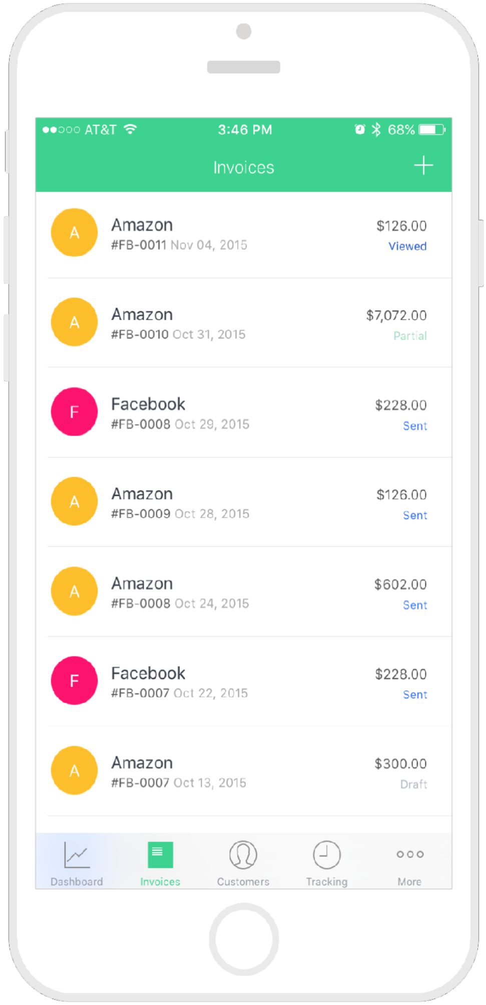
Average collection day period

This shows on average, how many days it takes your customers to pay you after receiving an invoice.

Time logs

Once you've tracked time, you'll see your total logged hours marked on a graph in this subsection.

INVOICES



Billing customers has never been easier.
Create, edit and send invoices on the go!

Invoice list view

When you first navigate to Invoices from the bottom menu, you'll see a list of the invoices you have drafted and sent. This list is arranged by date.

Creating a new invoice

To create a new invoice, tap on the "+" button in the upper right corner. You'll be taken to a new screen where you'll be prompted to fill in your invoice details. The **customer name, hours, and rate** are all required fields.

Previewing an invoice

To preview an invoice, tap on it from the Invoice List View. You'll be taken to the a preview screen labeled "Invoice Summary".

Editing an existing invoice

From the invoice summary, select the blue "Edit" button on the bottom left of the invoice summary. Change any information on the invoice by filling in new details and then choosing "Update invoice" on the bottom left. Use the green (+) signs to add new items and tasks to the invoice.

Keep in mind, if you are editing an invoice that has already been sent, you'll need to resend it. To do this, select "Finalize & Send" from the bottom right of the edit screen.

Adding a payment

To add a payment to an invoice, choose the blue "Add $" button from the bottom middle of the invoice summary. You can then record the amount a customer paid (the default is the amount of the invoice), the date they paid, and their payment method. You can also add notes you need to—the customer won't be able to see these.

When you are finished adding the details, choose whether you want to send a receipt to your customer by using the toggle. Then select "Add Payment" from the bottom of the screen.

Invoice history

Access your invoice history by going to your invoice summary screen, and then choosing the right hand tab, labeled "invoice history." You'll be able to see who has viewed, edited, created, or sent that invoice.

Invoice settings

To change your invoice settings, go to More > Settings. Then select the settings tab labeled "Invoices". From there, change any of the settings you want to apply to all your invoices, including:

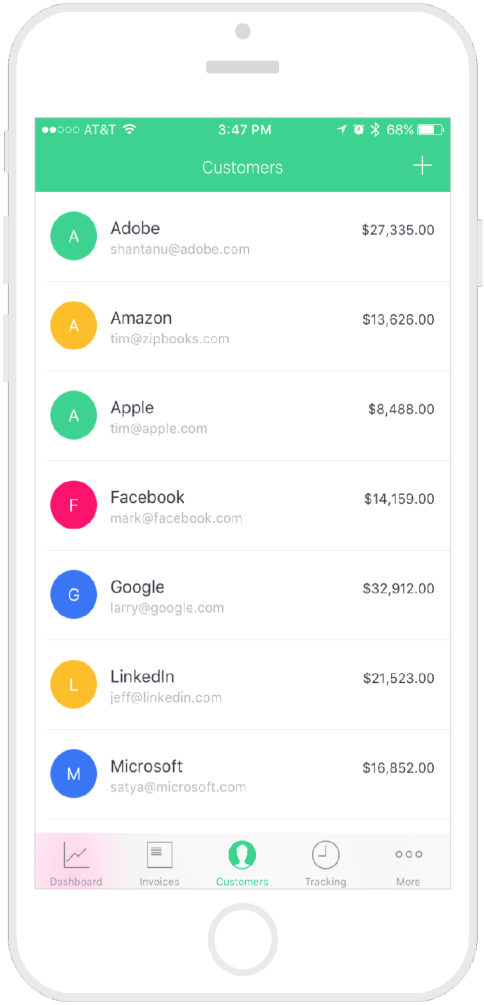
- **Default logo:** This is the logo that will appear on your invoices should you chose to upload it. Typically this would be your company logo.
- **Default terms:** e.g. On receipt of invoice...
- **Default notes:** Any notes you would prefer to appear on each invoice you send.
- **Default email subject:** If you do not update this field, the default subject will be "Invoice #000001" and so on.
- **Default email body:** If you do not update this field, the default email body will be "You have a new invoice from X".
- **Default email bcc:** This is the email that ZipBooks will send

a copy of your invoice to whenever you sends one to a customer.

- **Attach PDF by default:** If you would like to always send a PDF of your invoice to customers along with the standard, toggle this field to green.

  Make sure to save your default settings after you update them.

CUSTOMERS



Create and view customer information anywhere.

Customer list view

The customers list view shows any customers you have entered into ZipBooks, even if you have not sent an invoice to them yet. Tap on a customer to see more details.

Customer metadata

You can store a variety of contact details for your customers in ZipBooks and access them at any time. The name and email for the customer are required details.

Delete a customer

To delete a customer, swipe left on their entry in the list view, and then tap “Delete”.

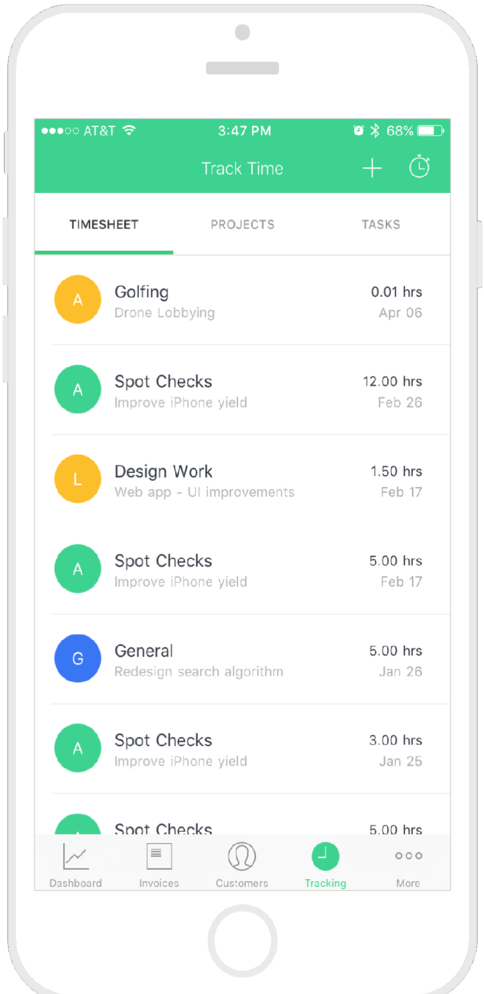
Creating a new customer

To create a new customer click on the “+” in the upper right hand corner of the customer list view. Then fill out the prompted fields.

Editing an existing customer

To edit an existing customer, simply tap on their entry in the list view and choose “Edit”.

TIME TRACKING



Track time while you work or enter it manually.

Time Entry List View

Editing time entries

You cannot edit entries that you have added to the time tracker. You will need to delete and recreate them manually instead.

Deleting time entries

To delete a time entry, swipe left on it and then tap delete.

Using the Time Tracker

Selecting a project and task

To begin using the time tracker, tap the “+” button in the upper right corner of the timesheet. You’ll be taken to the timer screen. Choose the button on the bottom left, “Select project”, to choose your project and task.

Starting the timer

Once you select a project and task, you’ll be taken back to the timer. Simply click “Start” on the bottom right to begin the timer.

Pausing and resuming the timer

The timer will run until you pause or stop it, even if you navigate away from the screen or close the app.

Choose pause at any time while you are taking a break in your work. Then choose resume when you are reading to start again.

Note: If you turn off your phone, the timer will stop running.

Submitting time

Once you've are finished timing a task, tap "Submit Time" to make an entry on the timesheet.

Manually Enter Time

To manually enter your hours, tap the clock symbol in the upper right corner of the screen. From there, enter the project, tasks, total hours, and any notes you need.

Projects and Tasks

Why projects and tasks?

Projects and tasks let you organize what type of work you are tracking and give different types custom hourly rates. Projects refers to a general assignment from a customer, while tasks are the individual actions that make up that project. You'll want to create an overall project first, and then the tasks that will be required for it.

Projects

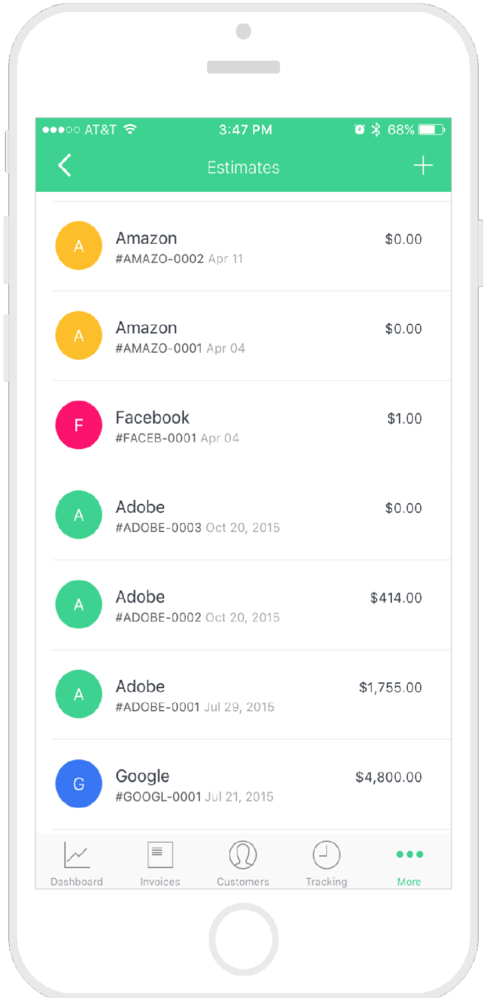
From the Tracking view, select "Projects" in the middle of the top menu. If you haven't created a project yet, you'll immediately be taken to the "Create Project" form. Fill out the details, including customer name, project name, billing method, and hourly rate. You can also leave any important notes about the project at the end.

If you've already created projects, you can choose one from the list that appears.

Tasks

From the Tracking view, select "Tasks" on the right of the top menu. If you haven't created a task yet, you'll immediately be taken to the "Create Task" form. Fill out the details, including the task name, the project, the hourly rate, and a general description.

ESTIMATES



Create and send an estimate outside of the office!

Estimate list view

To navigate to Estimates, select “More” from the bottom menu and the choose “Estimates”. You’ll be taken to the list view screen, where you can see estimates you’ve drafted and sent.

Creating a new estimate

To create a new estimate, tap on the “+” button in the upper right corner. You’ll be taken to a new screen where you’ll be prompted to fill in your estimate details.

Previewing an estimate

To preview an estimate, tap on it from the Invoice List View. You’ll be taken to the a preview screen labeled “estimate summary”.

Editing an existing estimate

From the view screen, select the blue “Edit” button on the bottom left of the invoice summary. You’ll then be able to change any information on the invoice by filling in new details and then choosing “Update estimate” on the bottom left.

Keep in mind, if you are editing an estimate that has already been sent, you will need to resend it. To do this, select “Finalize & Send” from the bottom right of the edit screen.

Adding items and tasks

If you want to go into more detail with you estimate, you can add specific items and tasks. This is helpful if you want to bill different amounts for different tasks, or if you want the customer to pay for an item you'll need. Use the green (+) signs to add new items and tasks to the estimate.

Estimate history

Go to the estimate summary screen, and then choose the right hand tab, labeled "Estimate History." You'll see who has viewed, edited, created, or sent that estimate.

Settings that affect estimates

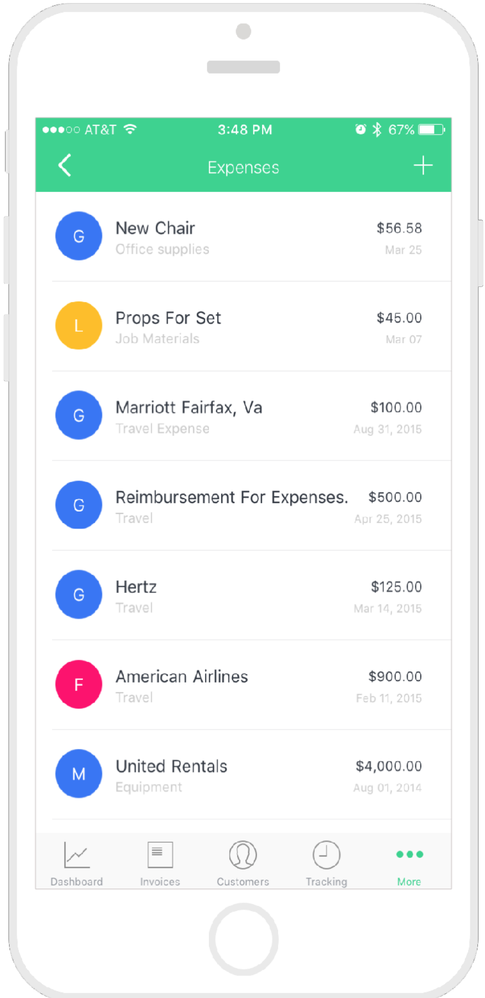
Changing the estimate label

Under Settings > General Settings, you can change what you call your estimates. For example, if you call estimates "bids" in your settings, then all estimates going forward will be labeled as "bids", including in your emails to customers.

Changing your default email settings

Your default email settings for invoices will also be the same for your estimates. Keep this in mind when you are changing details like your company name or email subject line.

EXPENSES



Save receipts on the go. No more paper!

Expense list view

From the expense list view, you can see any expenses you have previously recorded, arranged by date.

Creating a new expense

To create a new expense, tap on the “+” in the upper right hand of the list view screen. Enter the expense name, the date, and the category of expense. Then choose a customer from the drop down menu.

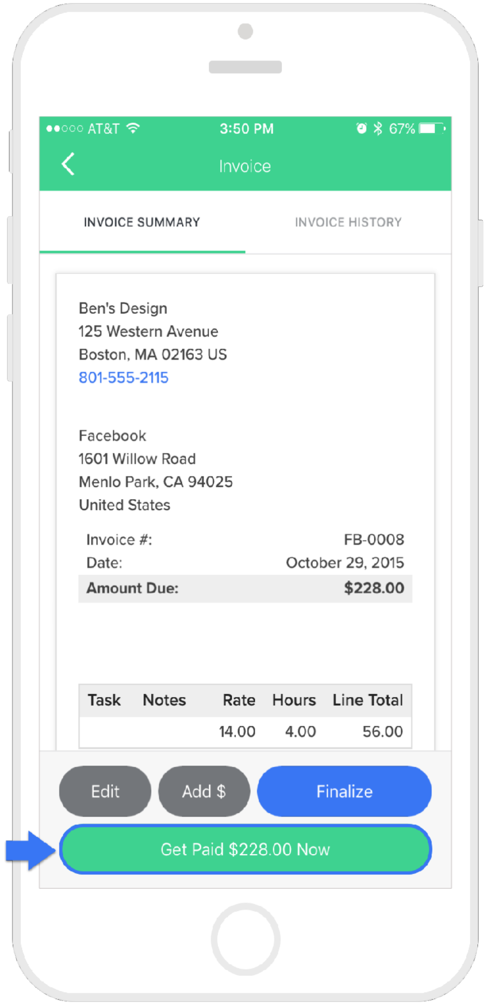
Editing an existing expense

To edit an existing expense, tap on it from the list view. You’ll be able to change the amount, date, etc.

Uploading a receipt

You can upload a receipt when you are creating or editing an expense. Scroll all the way down and then tap on “Upload an expense receipt” under “Expense image.” This lets you upload a photo stored on your phone. If your receipt photo is not on your phone, you’ll need to transfer it there.

INSTANT PAYMENTS



Instant payments let you get immediate cash for invoices you send. To access instant payments select More > Instant Payments. You'll be taken to the instant payment application screen.

Application process

Fill out each of the required fields to apply for instant payments. When you are finished, hit the green button at the bottom of the screen.

Your company's information is kept completely confidential by ZipBooks. You'll be notified that we received your application within 24 hours. We'll let you know the results of your application within 5-10 business days.

Creating a Dwolla account

Once your application is approved, you'll be notified by email. You'll then need to go to Settings > Instant Payments, where you'll be prompted to create a Dwolla account. This allows us to make you a payment to finance your invoices, and lets you pay us back on 12 month terms.

After you've created your Dwolla account, connect it to your bank. Then, allow ZipBooks permission to access Dwolla. ZipBooks will be able to see send you money, request money from you, and schedule payments (which you can cancel anytime).

Financing your first invoice

To finance your first invoice, go to Invoices in the app. Once you've been approved for instant payments, you'll see a new button after you finalize the invoice. Instead of choosing "Send", choose "Send and get paid now."

If you would like to get paid for an invoice you've already sent, select an invoice from the list view. Then, choose the green "Instant Payment" button.

Instant payments FAQ

What are Invoice Instant Payments?

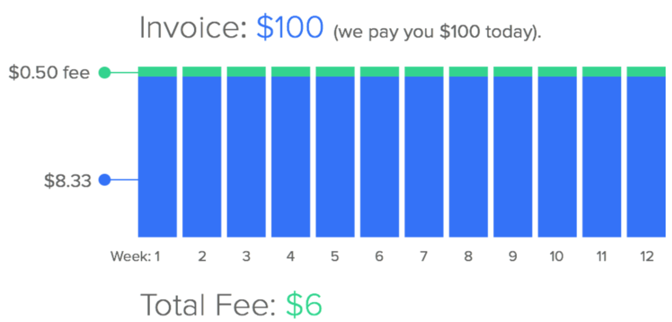
Invoice Instant Payments are our way of helping you better manage your cash flow and your business. If you have an invoice due in the future, but would like to get paid on it today, you can get it funded with a click of a button inside ZipBooks! We'll send 100% of the value of the invoice to your bank account (it normally arrives within 1 business day), and let you pay us back on low, straightforward terms.

How much does it cost to use Invoice Instant Payment?

We charge a 0.5% fee per week (with a one week minimum), and automatically schedule 12 equal payments for you to repay the Instant Payment in its entirety. If you only need the cash for a few weeks, you can reduce the cost of an advance by paying us back early.

After a week has past, prepay becomes available, and there's no prepayment penalty.

Here's what a typical Invoice Instant Payments payback schedule looks lik



How do I apply for Invoice Instant Payments participation?

Submit the application under “Instant Payment” in your account settings. Our underwriters will review your application, and let you know if you are approved within 2-3 business days.

What types of businesses will qualify for Invoice Instant Payments?

Invoice Instant Payment participation is currently limited to businesses incorporated in the United States.

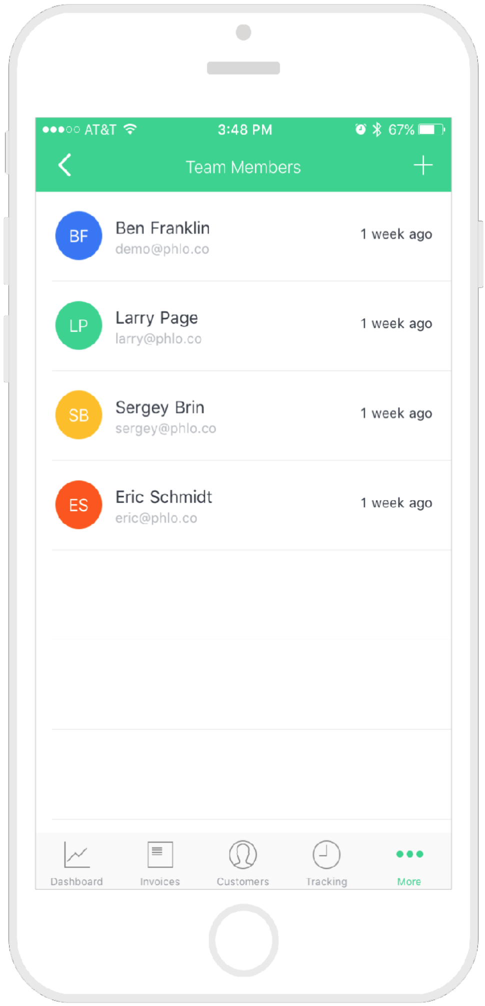
Is there a limit on how much I can use Invoice Instant Payments?

Yes. The limit depends on your business. You’ll be able to see that limit right here. The more you use Invoice Instant Payments, the more your limit increases!

When do funds arrive in my account?

Typically, next business day. We send the request to transfer to your bank or financial institution as soon as we receive it from you. If the bank receives that request before their ACH cut-off time (depends on the financial institution), the funds will become available to you the next morning. For most effective use of Instant Payments, we recommend initiating the payment before 12:00 PM PST Monday through Thursday.

TEAM



Manage your whole team with one device.

Team list view

To access the team list view, go to More > Team. From this view you can see all your current team members. Click on any of them to see more information.

Team member metadata

When you click on a team member from the list view, you'll see their information,

including name, email, and staff rate. Scroll down and you'll see what permissions they have in ZipBooks.

Editing a team member

If your permissions allow it, you can edit any team member by clicking on their entry in the list view.

Deleting a team member

To delete a team member, swipe left on the member from the list view, and then tap

"delete".

Creating a new team member

To create a new team member, tap the "+" in the upper right corner of the team list view.

The permissions manager

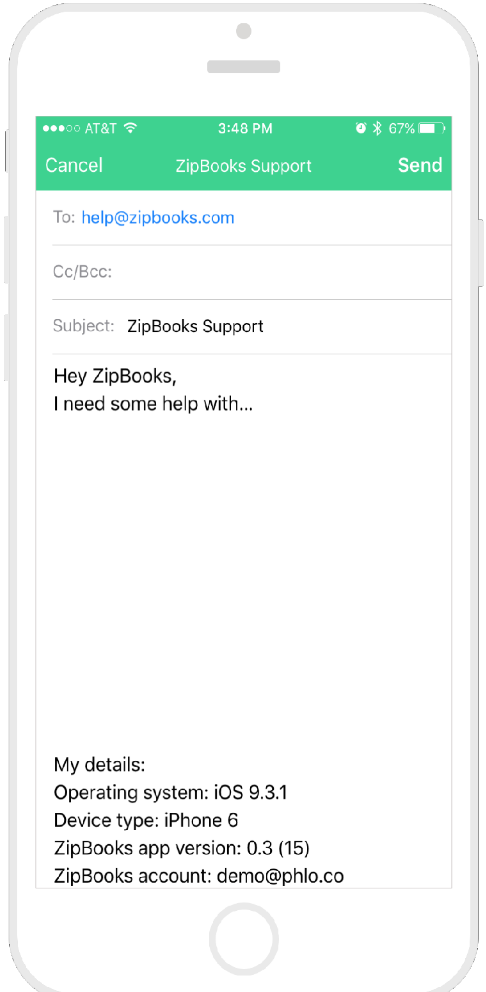
When you create or edit a team member, you'll see a long list of potential permissions marked with toggles. Slide the toggles to green for the permissions you wish to allow for that specific team member. Permissions available are:

- Manage account
- Manage projects
- Manage invoices
- Manage estimates
- Manage payments
- Manage tasks
- Manage expenses
- Track time
- Manage users
- Manage customers

Be sure to tap the "Save Team Member" button at the bottom of the screen when you are finished setting permissions.

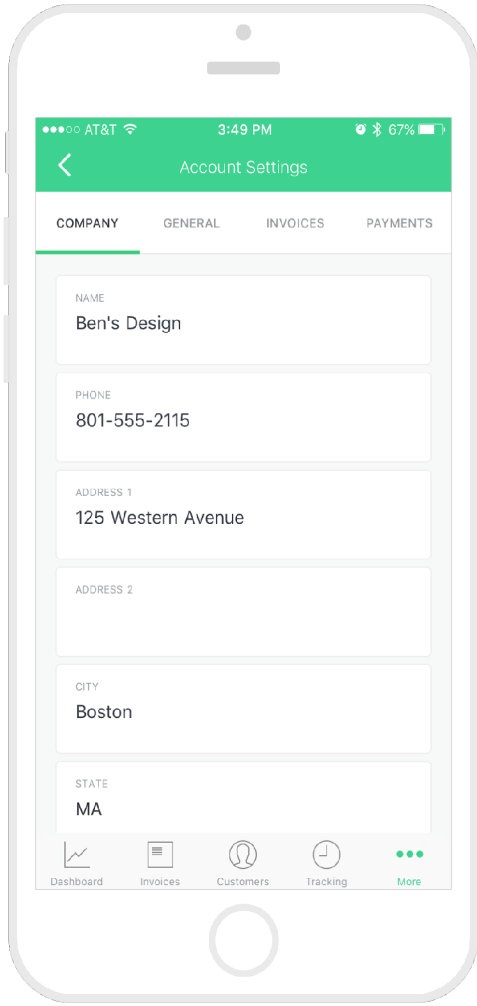
If you are not the account manager, and your account is too limited, you will need to talk to your account manager about resetting your team permissions.

SUPPORT



ZipBooks is committed to excellent customer support!

SETTINGS



Our settings let you customize your experience.

Company settings

This is where you fill out and update your company's name, location, and contact information.

General settings

General settings lets you fill out your preferred labels within ZipBooks. These are the default options:

- We call our customers: Customers
- We call our estimates: Estimates
- Default currency: USD

You can change any of these by using the dropdown menus to the right of the options.

Invoice settings

To change your invoice settings, go to More > Settings. Then select the settings tab labeled "Invoices". From there, change any of the settings you want to apply to all your invoices, including:

- **Default logo:** This is the logo that will appear on your invoices should you chose to upload it. Typically this would be your company logo.
- **Default terms:** e.g. On receipt of invoice...
- **Default notes:** Any notes you would prefer to appear on each invoice you send.
- **Default email subject:** If you do not update this field, the default subject will be "Invoice #000001" and so on.
- **Default email body:** If you do not update this field, the

default email body will be “You have a new invoice from X”.

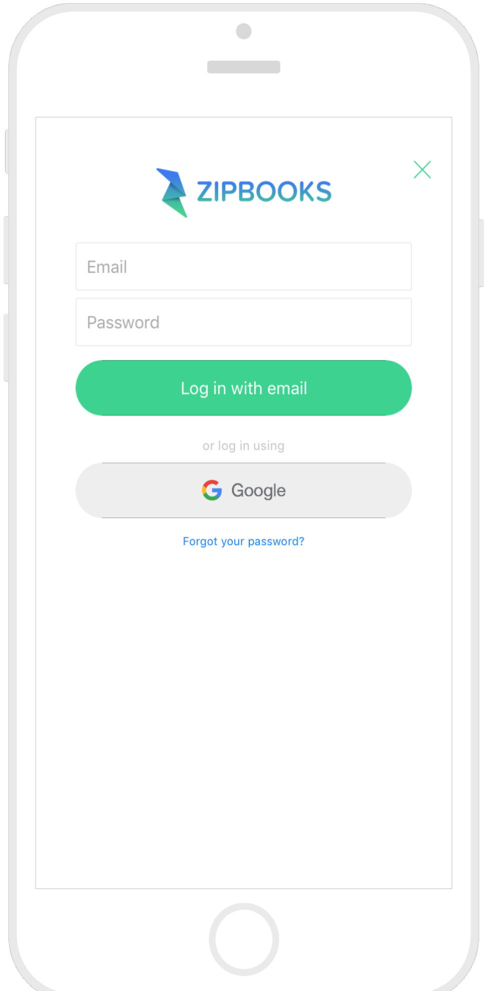
- **Default email bcc:** This is the email that ZipBooks will send a copy of your invoice to whenever you sends one to a customer.
- **Attach PDF by default:** If you would like to always send a PDF of your invoice to customers along with the standard, toggle this field to green.

Make sure to save your default settings after you update them.

Credit card processing

ZipBooks is integrated with Stripe and WePay. To enable these processing methods, go to More > Settings and then choose the “Payments” tab on the right. You will need to tap the “Accept Credit Cards” button.

LOGGING IN AND OUT



Logging in

You can log in with your username and password, or with Google single sign on. If you select “remember me” you won’t need to log in again for three months. If not, you’ll need to log in every time you open the app.

Logging out

To log out of ZipBooks, go to More > Log out.

IOS APP FAQS

What if I already have a email and password but I want to use my Google single sign on?

You can still use your Google single sign on. Log out of the app, and choose “sign in with Google.” You’ll be prompted to give your existing ZipBooks passwords once, after which you’ll always be able to sign in with Google.

Does this app support multi-currency?

It does. In your settings, you can change your currency from USD to CAD, EUR, GBP, CHF, or many more options.

How do I sort or filter a list?

Sorting and filtering lists is NOT enabled in the mobile app. If you need to filter a list, use the connected web app instead.

Is there an offline mode?

We know this is a popular request, but it’s not currently on our timeline.

Is this app available in other languages?

Not at this time.

Is this app really free? What's the catch?

Yes! ZipBooks is completely free software, there is no “premium version” that you need to upgrade to. Instead, we make our money through invoice financing for users who want to get paid for their invoices immediately.

Is my data secure on my phone?

Your data is secure. It is protected with 256-bit SSL encryption and the industry's highest security measures. For more information, check out our Security and Privacy Policy pages.

What credit cards can I accept?

With ZipBooks, you can accept all major credit cards, including Visa, MasterCard, and American Express. Through our Stripe integration, we also support international credit cards.

What are the fees for credit card processing?

Fees are a flat rate of 2.9% + 30 cents, even for international transactions. Although international rates can sometimes vary, we don't reflect that in our pricing.

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