

Billings Pro & Daylite Integration Guide

[Oct 26, 2012]

Table of contents

<i>Objective</i>	3
<i>Audience</i>	3
<i>Introduction</i>	4
<i>Before you integrate</i>	5
<i>Setting up Daylite and Billings Pro for integration</i>	6
<i>Billings Pro and Daylite 3 integration</i>	7
<i>Billings Pro and Daylite 4 integration</i>	17
<i>Help and other resources</i>	27

Objective

This document is for Billings Pro and Daylite users who wish to share data between the two applications.

Audience

This document is for individuals who manage their business in Daylite, but are interested in importing data from Daylite to Billings Pro for sending professional invoices and other billing activities.

Introduction

Billings Pro and Daylite integration allows you to share data between these 2 applications.

Daylite helps businesses organize themselves with powerful tools such as shared calendars, contacts, tasks, projects, notes and more. Billings Pro is a multi-user time tracking and invoicing application on Mac, iPhone, & Web.

You can set up your business in Daylite and import data into Billings Pro for managing your time-billing and invoicing needs. The seamless integration between Daylite and Billings Pro allows you to add contacts from Daylite as clients in Billings Pro. Any projects or opportunities linked to the contact in Daylite can be imported as projects in Billings Pro. Tasks and appointments linked to these projects become either estimate or working slips in Billings Pro. Sending invoices, recording payments, and other billing activities can all be easily accomplished in Billings Pro.

Before you integrate

To be able to integrate Billings Pro and Daylite, you will need the following:

- Daylite 3 users must ensure that you use the latest version of the application. If you are using Daylite 4, then Billings Pro can integrate with Daylite 4.1 (or higher).
- Both Daylite and Billings Pro applications must be installed on the same computer.
- You should keep one Daylite database and Billings Pro open. You can only integrate between the two of them.

Setting up Daylite and Billings Pro for integration

The following best practices are recommended for using Daylite and Billings Pro integration:

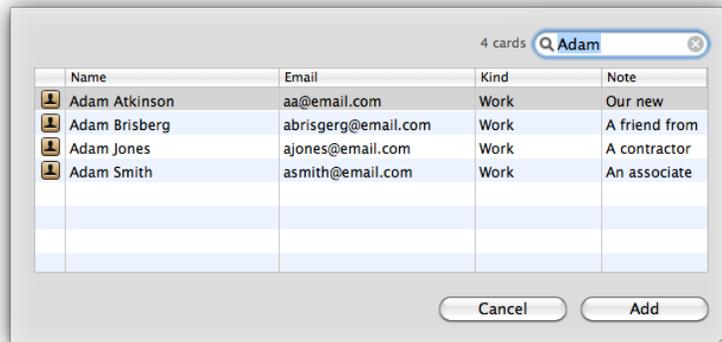
- It is a good idea to plan and manage your business in Daylite. Thus, all your primary business related information will be in Daylite and you can import it into Billings Pro. For instance, if you create a project in Billings Pro, it will only be available in Billings Pro. Whereas, if you create a project in Daylite and import it into Billings Pro, you have a record of data in both applications.
- It is best to start by adding a client in Billings Pro. This makes sure that if you are bringing in a project, opportunity, task, and/or appointment from Daylite, Billings Pro always knows where it is supposed to go.
- The full name of the Daylite user who owns the objects (such as tasks, appointments, etc) in Daylite must exactly match the worker name in Billings Pro (if one exists). This allows Billings Pro to assign the slip to that same worker. If no suitable match is found, then Billings Pro assigns it to the worker you are logged in as.
- It is good to use the Estimate feature of opportunities in Daylite to set up line-items for the products/services you are selling. You can import these line items to Billings Pro as slips and send them to your clients. This makes sure you have the same template styles available for both estimates and invoices.

Billings Pro and Daylite 3 integration

Information for users who are currently using Daylite 3 and wish to integrate with Billings Pro.

Adding a contact or organization from Daylite

1. In Billings Pro, choose File > Add Client from > Daylite.
2. In the sheet that opens, enter the contact or organization name in the search field and press the *return* key.



Adding a contact/organization from Daylite

3. Select the contact or organization you want to add to Billings Pro. Click Add.
Billings Pro adds the contact/organization to your client list.
 - If there are open projects/opportunities linked to the contact/organization in Daylite, Billings Pro opens a sheet displaying those projects and opportunities. You can select a project/opportunity that you wish to import.
 - If you choose to import an opportunity, you can include line items from the opportunity's estimate. The taxes you have set up in Billings Pro Preferences can be applied to the estimate.
 - You can select whether you wish to import appointments, tasks, file references, web references, and/ or notes.
 - You can choose whether you wish to import tasks/appointments as either estimate slips or working slips.
4. Click Import.

You can bring in contacts/organizations from Daylite and add them to Billings Pro one at a time. If you already have a Billings Pro client who matches the record you want to import from Daylite, Billings Pro alerts you that a duplicate record was found. If you still want to proceed, a second client with the same details will be created.

Importing a project or opportunity from Daylite

Generally, the first time you add a contact/organization from Daylite as a client in Billings Pro, you can import open projects and opportunities, tasks, and appointments linked to the contact/organization. For clients that have already been added from Daylite, Billings Pro provides an easy way to import projects, opportunities, tasks, appointments and more.

To import a project/opportunity from Daylite into Billings Pro

1. In Billings Pro, select a client.
2. Choose File > Import > Import Project Or Opportunity from Daylite for *client name*. Keep in mind the following:
 - If there are open projects and opportunities linked to the contact/organization in Daylite, Billings Pro opens a sheet displaying those projects and opportunities. You can select a project/opportunity that you wish to import.
 - If you choose to import an opportunity, you can include line items from the opportunity's estimate. The taxes you have set up in Billings Pro Preferences can be applied to the estimate.
 - You can select whether you wish to import appointments, tasks, file references, web references, and/ or notes.
 - You can choose whether you wish to import tasks/appointments as either estimate slips or working slips.
3. Click Import.

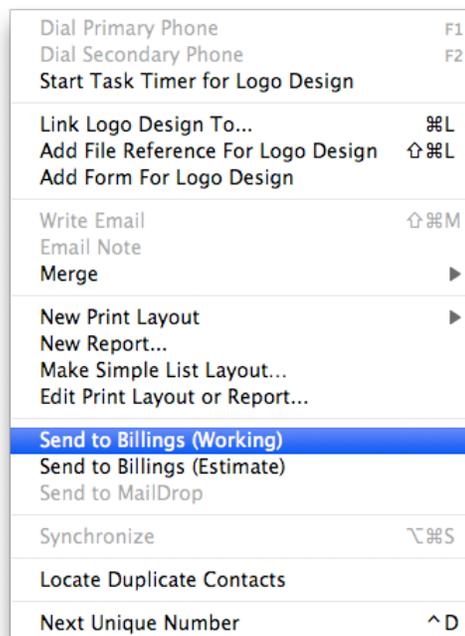
When you import tasks/appointments as slips in Billings Pro, you can filter and view slips from the last import only. To do this, choose View > All Slips and select Last Import from the pop-up menu. At any point, you can update Billings Pro by choosing File > Update from Daylite. The update will not overwrite your changes.

Sending a project from Daylite to Billings Pro

Starting from Daylite, you can send a project to Billings Pro. Billings Pro creates a project that retains the same name as the project in Daylite. Any tasks/appointments linked to the project in Daylite will be sent as either estimate slips or working slips based on your selection.

To send a project to Billings Pro starting from Daylite

1. In Daylite, select a project.
2. To send the tasks/appointments linked to the project as working slips, choose Actions > Send to Billings (Working). Or, to send the tasks/appointments linked to the project as estimate slips, choose Actions > Send to Billings (Estimate).



Sending a project from Daylite to Billings Pro

Note:

- If the project was not linked to any contact/organization in Daylite, then Billings Pro opens a new window where you can select a client to add the project/opportunity.
- If the project was linked to a contact/organization in Daylite who is also a client in Billings Pro, then Billings Pro adds the project to that client.
- If the project was linked to a contact/organization in Daylite that is not in Billings Pro, then Billings Pro creates the client and adds the project to that client.

When you send a project from Daylite to Billings Pro, you can filter and view the slips from your last import only in Billings Pro. To do this, choose View > All Slips and select Last Import from the pop-up menu.

At any point, you can update the project in Billings Pro by choosing File > Update from Daylite. This update will not overwrite your changes.

If both Billings and Billings Pro are found on your computer, Daylite will ask which one must be used and remember that preference for future uses of "Send To Billings."

Sending an opportunity from Daylite to Billings Pro

Opportunities are useful for managing prospects. Starting from Daylite, you can send an opportunity to Billings Pro. You would want to do this if you are repeatedly selling certain products or services or you want to send an invoice for a custom product that you have set up in Daylite.

When you send an opportunity to Billings Pro, it will be added as a new project. Any tasks/appointments linked to the opportunity in Daylite will be sent as either estimate slips or working slips depending on your selection.

To send an opportunity to Billings Pro starting from Daylite

1. In Daylite, select an opportunity.
2. To send the tasks/appointments linked to the opportunity as working slips, choose Actions > Send to Billings (Working). Or, to send the tasks/appointments linked to the opportunity as estimate slips, choose Actions > Send to Billings (Estimate).

Note:

- If the opportunity was not linked to any contact/organization in Daylite, then Billings Pro opens a new window where you can select a client to add the project/opportunity.
- If the opportunity was linked to a contact/organization in Daylite who is also a client in Billings Pro, then Billings Pro adds the project/opportunity to that client.
- If the opportunity was linked to a contact/organization in Daylite that is not in Billings Pro, then Billings Pro creates the client and adds the project/opportunity to that client.

When you send an opportunity from Daylite to Billings Pro, you can filter and view the slips from your last import only in Billings Pro. To do this, choose View > All Slips and select Last Import from the pop-up menu.

At any point, you can update the project in Billings Pro by choosing File > Update from Daylite. This update will not overwrite your changes.

If both Billings and Billings Pro are found on your computer, Daylite will ask which one must be used and remember that preference for future uses of "Send To Billings."

Sending a task/appointment from Daylite to Billings Pro

Working from Daylite, you can send tasks and appointments to Billings Pro. Tasks and appointments sent from Daylite will be added as either estimate slips or working slips in Billings Pro depending on your selection.

Sending tasks/appointments to Billings Pro as estimate slips enables you to generate estimates from them and send to clients. Sending tasks/appointments to Billings Pro as working slips enables you to generate invoices from them and send to clients.

To send a task/appointment to Billings Pro

1. In Daylite, select a task/appointment.
2. To send the task/appointment as a working slip, choose Actions > Send to Billings (Working). Or, to send the task/appointment as an estimate slip, choose Actions > Send to Billings (Estimate).

Note:

- If the task/appointment is not linked to a contact/organization in Daylite, Billings Pro adds the task/ appointment to the primary user by creating a project called "Slips Without a Project."
- If the task/appointment was linked to a contact/organization in Daylite that is also a client in Billings Pro, Billings Pro adds the task/appointment to that client by creating a project called "Slips Without a Project."
- If the task/appointment was linked to a contact/organization in Daylite that is not in Billings Pro, Billings Pro creates that client and adds the task/appointment by creating a project called "Slips Without a Project."

If you make changes to a task/appointment in Daylite after sending them over to Billings Pro, you can update Billings Pro by choosing File > Update from Daylite.

If both Billings and Billings Pro are found on your computer, Daylite will ask which one must be used and remember that preference for future uses of "Send To Billings."

Note: When you import an appointment into Billings Pro from Daylite, the information specified in "Details" section of the appointment in Daylite is brought into Billings Pro. This data can be seen in the "Comments" tab of the slip window in Billings Pro. Any information in the "Minutes" tab of the Appointment window in Daylite is not imported into Billings Pro.

Opening a project or slip in Daylite

For a project, opportunity, task, and/or appointment you've imported from Daylite, Billings Pro allows you to open that item in Daylite. This is useful if you're interested in quickly reviewing that item in Daylite.

To open a project in Daylite

1. In Billings Pro, select a project.
2. Choose Project > Open in Daylite.
Billings Pro takes you to the appropriate project/opportunity in Daylite.

To open a slip in Daylite

1. In Billings Pro, select a slip.
2. Choose Slips > Open Slip in Daylite.
Billings Pro takes you to the appropriate task/appointment in Daylite.

Mapping criteria

This section explains how different fields are mapped when you do an import from Daylite to Billings Pro.

Case 1: You add a client from Daylite (File > Add Client from > Daylite) into Billings Pro and import projects, opportunities, tasks, and/or appointments for the client. Or, you select a client in Billings Pro and import a project/opportunity from Daylite (File > Import > Import Project or Opportunity from Daylite).

Daylite	Billings Pro	Daylite field	Corresponding Billings Pro field
Contact	Client	First name Middle name Last name Default Organization Email Address Title Prefix	First name Middle name Last name Company Email Address Job Title Prefix
Project (Status must be one of New, In Progress, Deferred, Cancelled, or Abandoned)	Project	Name Started date Due date File reference Web reference	Name Started date Due date Click the "Links" tab to see the file and web links.
Opportunity (State must be open)	Project	Name Forecasted Close File reference Web reference	Name Due date Click the "Links" tab to see the file and web links.
Appointment	Estimate/working slip	Name Owner Duration Details	Name Worker Duration Comments
Task	Estimate/working slip	Name Owner Duration Due date Details	Name Worker Duration Due date Comments
File reference	File		
Web reference	Web URL		

Daylite	Billings Pro	Daylite field	Corresponding Billings Pro field
Line item from opportunity's estimate	Estimate/working slip	Name Quantity Price Description	Name Quantity Price Comments

Note:

1. A project in Daylite that is **not** marked as Completed can be imported into Billings Pro using the method given above. If you choose to import linked tasks/ appointments as estimate slips, then in Billings Pro, the project state is set as Estimate. Otherwise, it'll be set as Active.
2. An opportunity in Daylite whose state is Open can be imported into Billings Pro. If you choose to import linked tasks/appointments as estimate slips, then in Billings Pro, the project state is set as Estimate. Otherwise, it'll be set as Active.
3. For tasks marked as Done in Daylite, the start and end time is recorded as Duration for the slip in Billings Pro.

Case 2: Starting from Daylite, you select a project/opportunity/task/appointment and send it to Billings Pro (Actions > Send to Billings).

Daylite	Billings Pro	Daylite field	Corresponding Billings Pro field
Contact	Client	First name Last name Default Organization Email	First name Last name Company Email
Project	Project	Name Status Due date Started date Completed date Extra fields 1-4	Name State Due date Started date Completed date Extra fields 1-4
Opportunity	Project	Name State Forecasted Close Actual Close Extra fields 1-4	Name State Due date Completed date Extra fields 1-4

Daylite	Billings Pro	Daylite field	Corresponding Billings Pro field
Appointment	Estimate/working slip	Name Category Owner Start date End date Duration Details	Name Category Worker Started date Completed date Duration Comments
Task	Estimate/working slip	Name Category Owner Due date Start date Complete date Duration Details	Name Category Worker Due date Started date Completed date Duration Comments
Line item from opportunity's estimate	Estimate/working slip	Name Quantity Price Discount Total Description	Name Quantity Price Discount Total Comments

Billing for multiple workers

Consider you are using Daylite's projects for grouping work. In a multi-user environment, there are many users who are working on the project. Also, there are many projects in the project list with different users linked to each one of them. Each user who is working on the project creates a task/appointment, assigns a category, enters all the details, and links it to the project. When it is time to send the invoice to the client (usually, this is at the end of the month), the manager brings the project data from Daylite to Billings Pro. If the project already exists in Billings Pro, then the manager would simply update that project.

Tasks/appointments linked to the project in Daylite will be added as either estimate slips or working slips depending on your selection. If the owner of the task/appointment in Daylite exists as a worker in Billings Pro, then the slips will be assigned to that worker, otherwise, the slips will be assigned to the worker you are logged in as.

Workflow for a staff member

1. In Daylite, select a project.
2. Create tasks/appointments and link them to the project.

Workflow for a manager

A. Client and project don't exist in Billings Pro

1. Working from Billings Pro, add the client from Daylite.
2. Import the project/opportunity from Daylite to Billings Pro. Bring the tasks and appointments associated with the project/opportunity as estimate or working slips. Billings Pro creates a new project whose name matches the name of the project/opportunity in Daylite. Tasks/appointments linked to the project/opportunity in Daylite are imported as estimate or working slips depending on your selection.
3. To view the slips from the last import in Billings Pro, choose View > All Slips and select Last Import from the pop-up menu.
4. Open the slips, enter the appropriate information, and send the invoice.

B. Client and project exist in Billings Pro

1. In Billings Pro, select the project and choose File > Update from Daylite.
2. To view the slips from the last import in Billings Pro, choose View > All Slips and select Last Import from the pop-up menu.
3. Open the slips, enter the appropriate information, and send the invoice.

Billings Pro and Daylite 4 integration

Information for users who are currently using Daylite 4.1 (or higher) and wish to integrate with Billings Pro.

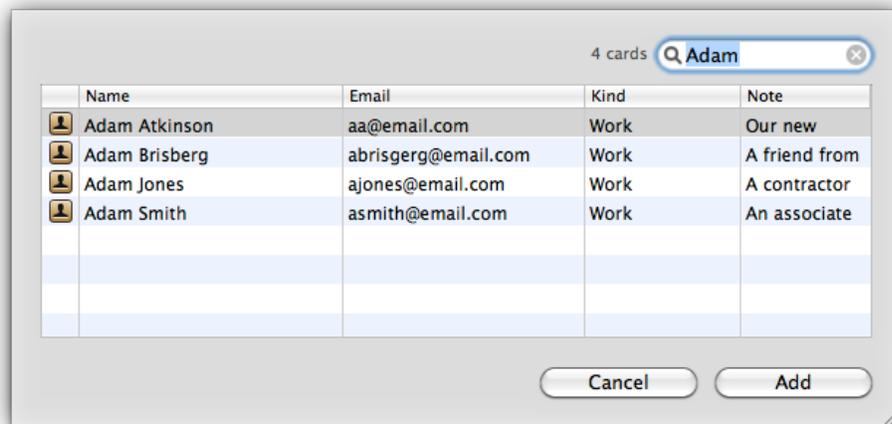
Note: If you need more information about using Daylite 4, please visit <http://www.marketcircle.com/help/training/daylite>.

Adding a person or company from Daylite

You can add contacts (people and companies) from Daylite as clients in Billings Pro.

To add a contact from Daylite

1. In Billings Pro, choose File > Add Client from > Daylite.
2. In the sheet that opens, enter the person or company name in the search field and press the return key.



Adding a person or company from Daylite

3. Select the record you want to add to Billings Pro. Click Add. Billings Pro adds the person/company to your client list.
 - If there are open projects/opportunities linked to the person/company in Daylite, Billings Pro opens a sheet displaying those projects and opportunities. You can select a project/opportunity that you wish to import.
 - If you choose to import an opportunity, you can include line items from the opportunity's estimate. The taxes you have set up in Billings Pro Preferences can be applied to the estimate.
 - You can select whether you wish to import appointments, tasks, file references, web references, and/ or notes.
 - You can choose whether you wish to import tasks/appointments as either estimate slips or working slips.
4. Click Import.

You can bring in people/companies from Daylite and add them to Billings Pro one at a time. If you already have a Billings Pro client who matches the record you want to import from Daylite, Billings Pro alerts you that a duplicate record was found. If you still want to proceed, a second client with the same details will be created.

Importing a project or opportunity from Daylite

The first time you add a person/company from Daylite in Billings Pro, you can import open projects and opportunities, tasks, and appointments linked to that person/company. For clients who have already been added from Daylite, Billings Pro provides an easy way to import projects, opportunities, tasks, appointments and more.

To import a project/opportunity from Daylite into Billings Pro

1. In Billings Pro, select a client.
2. Choose File > Import > Import Project Or Opportunity from Daylite for *client name*. Keep in mind the following:
 - If there are open projects and opportunities linked to the person/company in Daylite, Billings Pro opens a sheet displaying those projects and opportunities. You can select a project/opportunity that you wish to import.
 - If you choose to import an opportunity, you can include line items from the opportunity's estimate. The taxes you have set up in Billings Pro Preferences can be applied to the estimate.
 - You can select whether you wish to import appointments, tasks, file references, web references, and/ or notes.
 - You can choose whether you wish to import tasks/appointments as either estimate slips or working slips.
3. Click Import.

When you import tasks/appointments as slips in Billings Pro, you can filter and view slips from the last import only. To do this, choose View > All Slips and select Last Import from the pop-up menu. At any point, you can update Billings Pro by choosing File > Update from Daylite. The update will not overwrite your changes.

Sending a project from Daylite to Billings Pro

Starting from Daylite, you can send a project to Billings Pro. Billings Pro creates a project that retains the same name as the project in Daylite. Any tasks/appointments linked to the project in Daylite will be sent as either estimate slips or working slips depending on your selection.

To send a project from Daylite to Billings Pro

1. In Daylite, select a project.
2. To send the tasks/appointments linked to the project as working slips, choose File > Send To > Billings as Working. To send the tasks/appointments linked to the project as estimate slips, choose File > Send To > Billings as Estimate.

Note:

- If the project was not linked to a person/company in Daylite, then Billings Pro opens a new window where you can select a client to add the project/opportunity.
- If the project was linked to a person/company in Daylite who is also a client in Billings Pro, then Billings Pro adds the project to that client.
- If the project was linked to a person/company in Daylite who does not exist in Billings Pro, then Billings Pro creates the client and adds the project to that client.

When you send a project from Daylite to Billings Pro, you can filter and view the slips from your last import only in Billings Pro. To do this, choose View > All Slips and select Last Import from the pop-up menu.

At any point, you can update the project in Billings Pro by choosing File > Update from Daylite. This update will not overwrite your changes.

If both Billings and Billings Pro are found on your computer, Daylite will ask which one must be used and remember that preference setting in future.

Sending an opportunity from Daylite to Billings Pro

Starting from Daylite, you can send an opportunity to Billings Pro. You would want to do this if you are repeatedly selling certain products or services or you want to send an invoice for a custom product that you have set up in Daylite.

When you send an opportunity to Billings Pro, it will be added as a new project. Any tasks/appointments linked to the opportunity in Daylite will be sent as either estimate slips or working slips depending on your selection.

To send an opportunity from Daylite to Billings Pro

1. In Daylite, select an opportunity.
2. To send the tasks/appointments linked to the opportunity as working slips, choose File > Send To > Billings as Working. To send the tasks/appointments linked to the opportunity as estimate slips, choose File > Send To > Billings as Estimate.

Note:

- If the opportunity was not linked to a person/company in Daylite, then Billings Pro opens a new window where you can select a client to add the project/opportunity.
- If the opportunity was linked to a person/company in Daylite who is also a client in Billings Pro, then Billings Pro adds the project/opportunity to that client.
- If the opportunity was linked to a person/company in Daylite who does not exist in Billings Pro, then Billings Pro creates the client and adds the project/opportunity to that client.

When you send an opportunity from Daylite to Billings Pro, you can filter and view the slips from your last import only in Billings Pro. To do this, choose View > All Slips and select Last Import from the pop-up menu.

At any point, you can update the project in Billings Pro by choosing File > Update from Daylite. This update will not overwrite your changes.

If both Billings and Billings Pro are found on your computer, Daylite will ask which one must be used and remember that preference for future uses of "Send To Billings."

Sending a task/appointment from Daylite to Billings Pro

Working from Daylite, you can send tasks and appointments to Billings Pro. Tasks and appointments sent from Daylite will be added as either estimate slips or working slips in Billings Pro depending on your selection.

Sending tasks/appointments to Billings Pro as estimate slips enables you to generate estimates from them and send to clients. Sending tasks/appointments to Billings Pro as working slips allows you to generate invoices from them and send to clients.

To send a task/appointment from Daylite to Billings Pro

1. In Daylite, select a task/appointment.
2. To send the task/appointment as a working slip, choose File > Send To > Billings as Working. To send the task/appointment as an estimate slip, choose File > Send To > Billings as Estimate.

Note:

- If the task/appointment is not linked to a person/company in Daylite, Billings Pro adds the task/ appointment to "Internal Projects."
- If the task/appointment was linked to a person/company in Daylite who exists as a client in Billings Pro, Billings Pro adds the task/appointment to that client.
- If the task/appointment was linked to a person/company in Daylite who does not exist in Billings Pro, Billings Pro creates that client and adds the task/appointment to that client.

In all the above cases, if the owner of the task/appointment in Daylite exists as a worker in Billings Pro, then the task/appointment is assigned to that worker. Otherwise, the task/ appointment is assigned to the worker you are logged in as.

If you make changes to a task/appointment in Daylite after sending them over to Billings Pro, you can update Billings Pro by choosing File > Update from Daylite.

If both Billings and Billings Pro are found on your computer, Daylite will ask which one must be used and remember that preference for future uses of "Send To Billings."

Note: When you import an appointment into Billings Pro from Daylite, the information specified in "Details" section of the appointment in Daylite is brought into Billings Pro. This data can be seen in the "Comments" tab of the slip window in Billings Pro. Any information in the "Minutes" tab of the Appointment window in Daylite is not imported into Billings Pro.

Opening a project or slip in Daylite

For a project, opportunity, task, and/or appointment you've imported from Daylite, Billings Pro allows you to open that item in Daylite. This is useful if you're interested in quickly reviewing that item in Daylite.

To open a project in Daylite

1. In Billings Pro, select a project.
2. Choose Project > Open in Daylite.

Billings Pro takes you to the appropriate project/opportunity in Daylite.

To open a slip in Daylite

1. In Billings Pro, select a slip.
2. Choose Slips > Open Slip in Daylite.

Billings Pro takes you to the appropriate task/appointment in Daylite.

Updating your projects

For projects you have added in Billings Pro from Daylite, you can select them one at a time and update them by choosing File > Update from Daylite.

You can also update all active projects in Billings Pro that were added from Daylite by choosing File > Update all active projects from Daylite.

Mapping criteria

This section explains how different fields are mapped when you do an import from Daylite to Billings Pro.

Case 1: You add a client from Daylite (File > Add Client from > Daylite) into Billings Pro and import projects, opportunities, tasks, and/or appointments for the client. Or, you select a client in Billings Pro and import a project/opportunity from Daylite (File > Import > Import Project or Opportunity from Daylite).

Daylite	Billings Pro	Daylite field	Corresponding Billings Pro field
Contact	Client	First name Middle name Last name Default Company Email Address Title Prefix	First name Middle name Last name Company Email Address Job Title Prefix
Project (Status must be one of New, In Progress, Deferred, Cancelled, or Abandoned)	Project	Name Start date Due date File reference Web reference	Name Started date Due date Click the "Links" tab to see the file and web links.
Opportunity (State must be open)	Project	Name Forecasted File reference Web reference	Name Due date Click the "Links" tab to see the file and web links.
Appointment	Estimate/working slip	Name Owner Duration Details	Name Worker Duration Comments
Task	Estimate/working slip	Name Owner Duration Due date Details	Name Worker Duration Due date Comments
File reference	File		
Web reference	Web URL		

Daylite	Billings Pro	Daylite field	Corresponding Billings Pro field
Line item from opportunity's estimate	Estimate/working slip	Name Quantity Price Description	Name Quantity Price Comments

Note:

1. A project in Daylite that is **not** marked as Completed can be imported into Billings Pro by going to File > Import > Import Project or Opportunity from Daylite. If you choose to import linked tasks/ appointments as estimate slips, then in Billings Pro, the project state is set as Estimate. Otherwise, it'll be set as Active.
2. An opportunity in Daylite whose state is Open can be imported into Billings Pro. If you choose to import linked tasks/appointments as estimate slips, then in Billings Pro, the project state is set as Estimate. Otherwise, it'll be set as Active.
3. For tasks marked as Done in Daylite, the start and end time is recorded as Duration for the slip in Billings Pro.

Case 2: Starting from Daylite, you select a project/opportunity/task/appointment and send it to Billings Pro (File > Send To > Billings as Estimate Slip, or, File > Send To > Billings as Working Slip).

Daylite	Billings Pro	Daylite field	Corresponding Billings Pro field
Contact	Client	First name Last name Default Company Email	First name Last name Company Email
Project	Project	Name Status Due date Start date End date Extra fields 1-4	Name State Due date Started date Completed date Extra fields 1-4
Opportunity	Project	Name State Forecasted Extra fields 1-4	Name State Due date Extra fields 1-4

Daylite	Billings Pro	Daylite field	Corresponding Billings Pro field
Appointment	Estimate/working slip	Name Category Owner Start date End date Duration Details	Name Category Worker Started date Completed date Duration Comments
Task	Estimate/working slip	Name Category Owner Due date Start date End date Duration Details	Name Category Worker Due date Started date Completed date Duration Comments
Line item from opportunity's estimate	Estimate/working slip	Name Quantity Price Discount Total Description	Name Quantity Price Discount Total Comments

Billing for multiple workers

Consider you are using Daylite's projects for grouping work. In a multi-user environment, there are many users who are working on the project. Also, there are many projects in the project list with different users linked to each one of them. Each user who is working on the project creates a task/appointment, assigns a category, enters all the details, and links it to the project. When it is time to send the invoice to the client (usually, this is at the end of the month), the manager brings the project data from Daylite to Billings Pro. If the project already exists in Billings Pro, then the manager would simply update that project.

Tasks/appointments linked to the project in Daylite will be added as either estimate slips or working slips depending on your selection. If the owner of the task/appointment in Daylite exists as a worker in Billings Pro, then the slips will be assigned to that worker, otherwise, the slips will be assigned to the worker you are logged in as.

Workflow for a staff member

1. In Daylite, select a project.
2. Create tasks/appointments and link them to the project.

Workflow for a manager

A. Client and project don't exist in Billings Pro

1. Working from Billings Pro, add the client from Daylite.
2. Import the project/opportunity from Daylite to Billings Pro. Bring the tasks and appointments associated with the project/opportunity as estimate or working slips.
Billings Pro creates a new project whose name matches the name of the project/opportunity in Daylite. Tasks/appointments linked to the project/opportunity in Daylite are imported as estimate or working slips depending on your selection.
3. To view the slips from the last import in Billings Pro, choose View > All Slips and select Last Import from the pop-up menu.
4. Open the slips, enter the appropriate information, and send the invoice.

B. Client and project exist in Billings Pro

1. In Billings Pro, select the project and choose File > Update from Daylite.
2. To view the slips from the last import in Billings Pro, choose View > All Slips and select Last Import from the pop-up menu.
3. Open the slips, enter the appropriate information, and send the invoice.

Help and other resources

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

- We have certified partners who can provide product training and other specialized services. For more information, visit <http://partners.marketcircle.com/partners/index>.
- Apple Help offers step-by-step instructions and tips for making the most of Billings Pro. While using Billings Pro, choose **Help > Billings Pro Help**.
- The Billings Pro knowledge Base has up-to-date articles that can help you solve technical difficulties. Visit <http://www.marketcircle.com/help/troubleshooting/billingspro>.
- The forums is a good place to share ideas, tips, and questions with fellow Billings Pro users. Marketcircle engineers, designers, and support staff also share their knowledge on the forums. Visit <http://forums.marketcircle.com>.

© 2012-2013 Marketcircle Inc. All rights reserved.

Under the copyright laws, this manual may not be copied, in whole or in part, without the written consent of Marketcircle Inc.

Every effort has been made to ensure that the information in this manual is accurate. Marketcircle is not responsible for printing or clerical errors.

Marketcircle Inc.
30 Centurian Dr, Suite 201
Markham, Ontario
L3R8B8, Canada

Phone: +1 905 480 5555
Fax: +1 905 248 3101
Email: info@marketcircle.com

