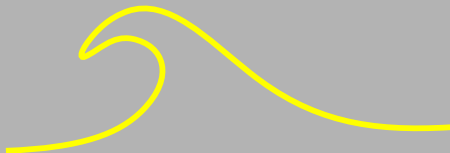
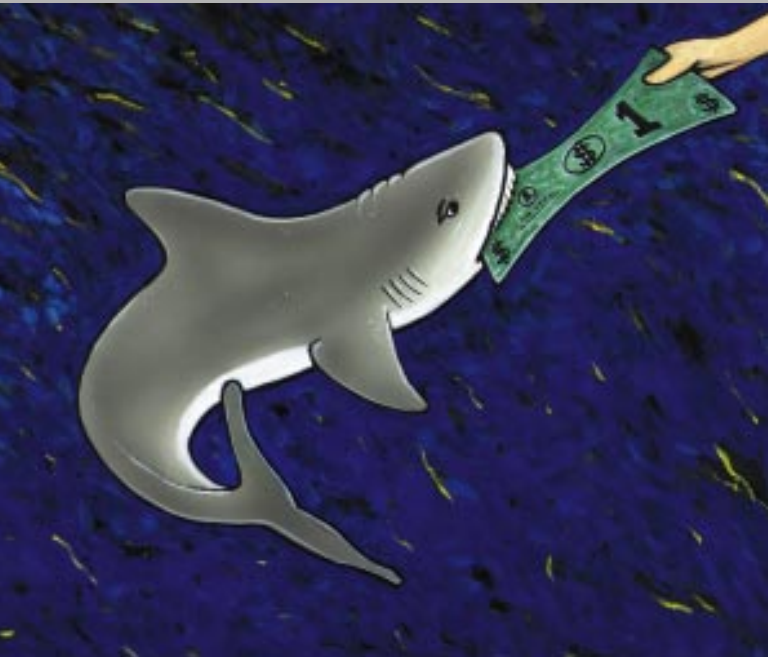


# Bills to Pay Pro<sup>TM</sup>

## *User Manual*



**MAR Software<sup>TM</sup>**

THE WAVE OF THE FUTURE

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## Chapter 1

# Introduction to Bills to Pay™ Pro

Welcome to Bills to Pay Pro from MAR Software. Bills to Pay is a bill management system that allows you to track bills you customarily pay, expenses you incur such as credit card charges, ATM withdrawals, grocery lists, expenses associated with business trips, or just about any type of expense or budgeting projection you can think of. Bills to Pay can be customized to your needs and offers an alarm feature to alert you of bill due dates. Bills can be sent to the Calendar and Bills Lists can be sent to the Notepad. For those of you who use Pocket Money or Pocket Quicken, Bills to Pay can send items from your Bills Lists to any Pocket Money or Pocket Quicken account you designate, and can also look up and use balances from any of your Pocket Money or Pocket Quicken accounts.

Bills to Pay is the brainchild of Edward Martin, a Naval Architect, Software Engineer, and founder of MAR Software, who spends his spare time trying to squeeze as many toys out of each paycheck as possible. A Newton here, a new windsurfing sail there, and the odd PowerPC or two (yeah, one's portable). In order to successfully live on the bleeding edge, he developed Bills to Pay for the Newton. Now, no matter where he and his Newton are, he always knows, to the penny, whether he can afford this latest indulgence or not. Not that it stops him from buying it, you understand. But now he knows for *sure* when he commits himself to the plastic god, whether he can afford this toy or not.

We at MAR Software would like to thank you for choosing Bills to Pay and we invite your comments and suggestions regarding our product. Please address all correspondence to Edward Martin at:

AOL ..... MartinEd  
CompuServe ..... 76502,13  
Internet ..... info@marsoftware.com

or by regular mail to:  
MAR Software  
1801 Shore Line Drive, Suite 233B  
Alameda, CA 94501 U.S.A.

## **If You Hate Manuals**

If you hate manuals or just can't wait to get started turn to the QuickStart card. The QuickStart card offers an at-a-glance reference to all of the Bills to Pay components to get you on your way.

## **Uses for Bills to Pay**

Bills to Pay has as many uses as there are users. It was designed to track upcoming monthly bills and expenses, however, our users have found that it works well in a multitude of other ways. Below are some popular uses of the software.

### **Tracking Expenses**

- Monthly bill payments—don't incur late charges or avoidable bank fees any more. Let the Bills to Pay alarms warn you of upcoming bills or postdated checks.

- Trip expenses—track the cost of meals, accommodation, mileage, etc., while traveling for pleasure or business.
- Daily expenses—keep track of what really happens to those \$50 you withdraw from the ATM every few days. You will then have accurate information to enter into your financial management program, instead of the usual guesses.
- Shopping /Grocery/Holiday lists—keep yourself focused while you shop by buying the items on your list, or, keep from fainting at the register by entering the amount of each item as you pick it up. It's also a good way of not forgetting anyone on your holiday gift list, and lets you budget your holiday spending in advance.

### **Tracking Accounts**

- Credit card charges—keep a list of credit card charges to compare with your monthly statements.
- ATM withdrawals—keep a list of withdrawal amounts and dates to compare with your monthly bank statements. In an effort to conserve our environment, some ATM providers are making paper transaction receipts optional. Now, you can do your part.

### **Tracking Birthdays**

- Birthdays and gift costs—one enterprising grandmother keeps a list of her grandchildren's birthdays, complete with alarms, so she doesn't miss anyone. When she purchases a gift, she enters the amount of the gift for reference.



## **Budgeting**

- You can create a list for each of several months and use them to project monthly expenses to see how much you can put aside each month for those things you've been dreaming about.
- On a more basic level, you can also determine if your paycheck will stretch as far as it needs to for a given month.

## **What's New**

Below are highlights of the new features in Bills to Pay Pro:


- Supports Pocket Quicken.
- Floating button lets you access Bills to Pay quickly.
- Post Bill Items to the Calendar or ToDo list.
- Send Bills Lists to the Notepad.
- Improved alarms, including a Preference option for displaying and/or clearing all active Bills to Pay alarms.
- Improved balance and total display options.
- New printing formats: Bills List and Unpaid Bills.
- Support for the Assistant and Newton 2.0 stationery.
- Expanded help file in Newton Book format. Once you no longer need the help book, you can remove it. This saves on internal storage space and makes the application faster.
- Streamlined application uses less space on your storage card.

## Installing Bills to Pay

The Bills to Pay Pro application, the Bills to Pay Help Book, and the Bills Stationery are installed onto your MessagePad using the Newton Backup Utility. It is not necessary to install the Help Book in order to use Bills to Pay.

**Important** For best performance, we recommend that you install Bills to Pay on a PCMCIA storage card instead of on internal MessagePad memory.

### Installing with the Newton Backup Utility

- 1** If you want to install the software onto a storage card, insert the card into your MessagePad.
- 2** Connect your MessagePad to your desktop computer using a serial cable. For more complete instructions on doing this, see your Newton Backup Utility user's guide.
- 3** On your MessagePad, tap Extras▶
- 4** In the Extras Drawer, tap Connection .
- 5** Choose the type of connection in the Connection Options slip.
- 6** On your Macintosh or Windows screen, select Install Package.
- 7** In the directory dialog box that appears, choose Bills to Pay, Help Book, or Bills Stationery.
- 8** On your MessagePad, tap Connect to establish the connection.

The Help Book is installed in the Help folder and the Bills Stationery is installed in the Extensions folder.

## Chapter 2 Tutorial

Below is a brief tutorial to help you get started entering bills right away. For more detailed information look for the specific topic in the Index or Table of Contents of this manual.

### Creating and naming a new list

- 1 Tap the New button at the bottom of the Overview.
- 2 Choose Home Bills for this tutorial.
- 3 Scrub out the default name and write a new name on the title line.

1:31 Tue 12/12		◆ Unfiled Bills	
Title		Created	
January Household Bills		12/12/95	

### Completing a bill

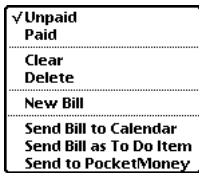
- 1 Write 'Mortgage' on the first blank Bills line.

1:37 Tue 12/12		◆ Unfiled Bills	
Title		Created	
January Household Bills		12/12/95	
Payee	\$	Amount	Due
◆ Mortgage		\$1,475.00	1/2

- 2 Write '1475' in the adjacent Amount line.
- 3 Tap the Date button, tap Today, and tap Enter.

## Marking a bill as paid

- 1 Tap the '\$' next to the amount.

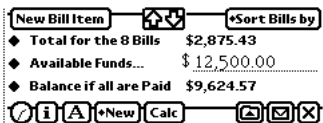


- 2 Tap Paid. The '\$' changes to a 'P' to indicate the bill has been paid.

**Important** If you have Pocket Money or Pocket Quicken installed, in addition to marking the bill as paid, you can tap the '\$' next to the amount and tap Send to Pocket Money or Pocket Quicken to send the item to a Pocket Money or Pocket Quicken account. The '\$' will invert to show that the item has been posted to Pocket Money or Pocket Quicken.

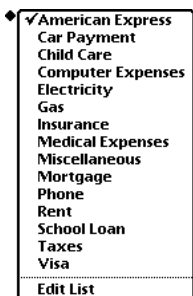
## Entering your Available Funds

- 1 Scrub out '0.00' in the Available Funds line.
- 2 Write in a new amount. The balances at the bottom of the screen reflect your changes.



## Completing a bill using the pop-up list

- 1 Tap the diamond to the left of the next blank bill.



- 2 Tap American Express.
- 3 Write '200' in the Amount line.
- 4 Tap the adjacent date button, choose a date two days away, and tap Enter.

## Setting an alarm

- 1 If you closed the calendar, tap the Due date button for the American Express bill.

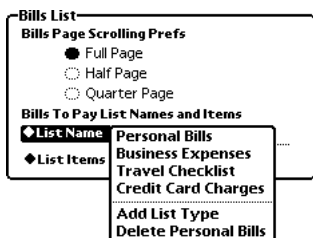


*Note date alarm  
has been set for  
appears here.*

- 2 Tap the diamond to the left of Weeks Notice.
- 3 Tap Days Notice. This now shows 1 Days Notice.
- 4 Tap the Set Alarm button. The button changes to Remove Alarm, indicating that your alarm is now set and will alert you tomorrow that this bill is due the next day. Tapping the Remove Alarm button will clear the alarm for that bill.

## Creating a new list type

- 1 Tap the Info button ⓘ at the bottom of a Bills List or the Overview.
- 2 Tap Prefs.
- 3 Tap List Name in the Bills List Preferences.

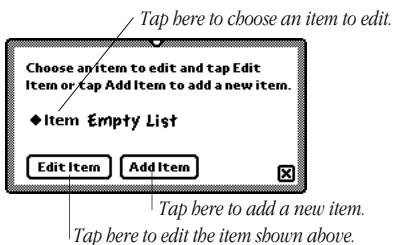


- 4 Tap Add List Type.
- 5 Scrub out Empty List Type and write in Gift List. This creates a new List Type titled Gift List.

## Customizing list pop-ups

- 1 Make sure Gift List is selected in the List Name in the Preferences.

- 2 Tap List Items, tap Edit List.
- 3 In the Edit List Slip, tap Add Item.



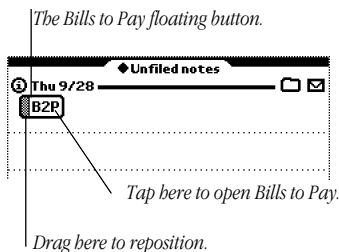
- 4 Write in a name (Mary, for example), and close the slip.
- 5 Repeat steps three and four until your list is complete.
- 6 Close the slip.

Now when you create a new list, the Gift List will show up as a list type and all of your custom items will appear in its bill pop-up.

## Chapter 3

# The Buttons

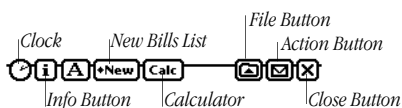
Bills to Pay Pro offers a floating button that opens the Bills to Pay application. The button is an option and must be turned on in the Preferences to be available. After you turn on this Preference option and close Bills to Pay, the floating button will appear in the upper left corner of your MessagePad screen. The button can be moved to any part of the screen by dragging it by its left side to a new location on the screen.





### The Button Bar


The Button Bar appears at the bottom of both the Overview and Bills List whenever Bills to Pay is open. Six of the buttons pertain specifically to Bills to Pay; the Info button, the New button, the Calc button, the File button, the Action button, and the close button.








The Clock button  gives time, date, and battery information.

The Info button  opens a pop-up list that lets you access the Bills to Pay About screen, the Bills to Pay Help screen, or the Bills to Pay Preferences. Each of these items is described in more detail later in this manual.

The New button  is for creating new Bills to Pay lists. Tapping this button opens a pop-up of List Types from which you can choose. List Types and Bills Lists are described in more detail later in this manual.

The Calc button  opens the MessagePad's Calculator, in case you need to do a computation while in Bills to Pay.

The File button  lets you file your Bills to Pay lists.

The Action button  lets you print, fax, beam, mail, duplicate, duplicate for next month, clear list alarms, send a list to the Notepad, or delete a list. It also allows you to move a list to and from a storage card.

The Close button  closes Bills to Pay.

## Chapter 4 Overview

When you launch Bills to Pay for the first time, it opens to the Overview. The Overview is a summary page that shows all the Bills Lists in the currently active folder. On first launch, the Overview shows one Bills List titled “Your First B2P List” in the Unfiled Bills folder.

Tap here to choose a sort option for the Overview.

Tap here to choose a different folder or to display all Bills Lists.

Tap here to choose which balance or total to display for all lists.

1:14 Tue 12/12		◆ Unfiled Bills
◆ Sort On:	Name of List	◆ Bills Total
<input type="checkbox"/>	<b>American Express Bills</b> Date Created: 12/12/95	\$684.78
<input type="checkbox"/>	<b>ATM Transactions</b> Date Created: 12/12/95	\$467.83
<input checked="" type="checkbox"/>	<b>Budget for Home Remodeling</b> Date Created: 12/12/95	\$35,867.55
<input type="checkbox"/>	<b>Business Trip to N.Y. Expenses</b> Date Created: 12/12/95	\$1,483.45
<input type="checkbox"/>	<b>Holiday Shopping List</b> Date Created: 12/12/95	\$783.00
<input checked="" type="checkbox"/>	<b>Home Budget for March</b> Date Created: 12/12/95	\$3,843.17
<input type="checkbox"/>	<b>January Household Bills</b> Date Created: 12/12/95	\$2,875.43
<input type="checkbox"/>	<b>Vacation Expenses</b> Date Created: 12/12/95	\$6,589.00
<b>Total of bills in folder...</b>		<b>\$52,594.21</b>
<b>The total number of lists in memory is... 11</b>		

Tap here to open the calculator.

Balance Summary for all Lists in the current folder.

Total number of Bills to Pay lists in all folders.

Tap here to close Bills to Pay.

Tap here to print, fax, beam, or mail selected lists.

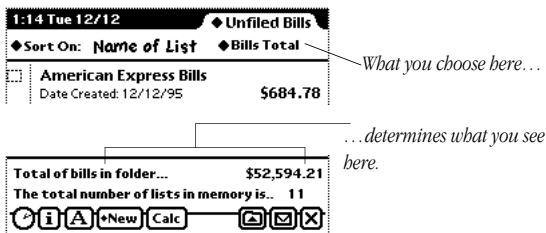
Tap here to file selected lists.

Tap here to create a new Bills to Pay list.

Tap here for information on MAR Software, for help using Bills to Pay, or to open the Prefs.

The bottom of the Overview shows the total for the bills in the folder you are in. This total is based on the balance selection you made from the Balance Option pop-up.

- Bills Total—displays the sum of all of the bills for each of the lists in the current folder.
- Unpaid Bills Total—displays the sum of all unpaid bills for each of the lists in the current folder.
- Paid Bills Totals—displays the sum of all paid bills for each of the lists in the current folder.
- Available Bal—displays the available balances for each of the lists in the current folder.
- Bal. (All Bills)—displays the available balance if all of the bills for each list in the current folder were paid.
- Bal. (Unpaid Only)—displays the balance of unpaid bills for each list in the current folder.
- Bal. (Paid Only)—displays the balance available after deducting only those bills marked paid in the lists in the current folder.



## Displaying all Bills Lists in the Overview

The last line at the bottom of the Overview shows the total number of Bills to Pay lists that you have created. These lists may be filed in different folders and may not all display in the Overview.

### To display all of the Bills lists in the Overview


- 1 Tap the diamond at the top right of the Overview.
- 2 Tap All Bills at the bottom of the pop-up.

You can also follow the steps above to switch to a different folder. Instead of tapping All Bills, tap the folder you want to go to. If that folder contains Bills lists, the lists will appear. Otherwise, the Overview will display a message stating that there are no lists in that folder.


## Scrolling the Overview

The Overview displays a varying number of Bills Lists, depending on which of the MessagePad's orientations you are currently using. If you have more Bills Lists than can be displayed, you must scroll to see the rest of your Bills Lists.

### To scroll the Overview

- Tap the down arrow  in the button bar to see items at the bottom of the Overview, or, tap the up arrow to see items at the top of the Overview.

## Switching From the Overview to a Bills List


Tap a Bills List in the Overview to open it, tap the New button and create a new list, or tap the Overview button  to open the first list.

## Chapter 5

# The Bills List

The Bills List contains information on the bills you need to pay or have already paid. You can name each list, customize the bills pop-up to include bills you commonly pay, you can mark items as paid or unpaid, you can send bills directly to Pocket Money or Pocket Quicken or to any financial management program that supports the Pocket Money Financial Posting Standard™, you can select which balances and totals to view, you can send bill items to the Calendar or ToDo list, or Bills Lists to the Notepad, and you can set alarms so that Bills to Pay can alert you of bills or postdated checks that are coming due.

### To create a list

- 1 Tap the New button  at the bottom of the Overview or Bills List.
- 2 Choose a list type .  
A new, blank Bills to Pay list is created. Your new list will be titled 'Name Your B2P List' by default.

### To name your list

- 1 Scrub out the default name.
- 2 Write the new name on the title line.

Tap here to choose a Bill Item or edit the bill items in the pop-up.  
 Scrub out the default name and write in the name of your list.  
 Tap here to sort bills alphabetically. An underline shows the sort column.  
 Tap here to bring unpaid bills to the top of the list.

1:39 Tue 12/12 ◆ Unfiled Bills

Title	Created
January Household Bills	12/12/95
Payee	\$ Amount Due
◆ Mortgage	P 1,475.00 1/2
◆ Car Insurance	\$ 145.00 1/15
◆ Car Payment	\$ 425.00 1/19
◆ Phone	\$ 225.00 1/25
◆ Utilities	\$ 302.43 1/26
◆ Medical Expenses	\$ 105 1/20
◆ Health Club	\$ 145 1/25
◆ Cable	\$ 53 1/15
◆ Total for the 8 Bills \$2,875.43	
◆ Available Funds... \$12,500.00	
◆ Balance if all are Paid \$9,624.57	

◆ New Bill Item ◆ Sort Bills by

◆ Total for the 8 Bills \$2,875.43

◆ Available Funds... \$12,500.00

◆ Balance if all are Paid \$9,624.57

◆ i ◆ A ◆ New Calc

Names Dates Extras Undo Find Assist

Tap here to sort bills by amount.

This is the list's creation date.

Tap here to sort by due date.

Tap here to enter a bill's due date or to set an alarm. A bold outline indicates that an alarm has been set for that bill.

Tap here to choose a sort order.

Tap the diamond to choose a total to display.

Write in the available funds here. If Pocket Money or Pocket Quicken is installed, tap 'Available Funds' to choose a balance from a Pocket Money or Pocket Quicken account.

Tap here to scroll the Bills List.

Tap here to add a new bill to the list.

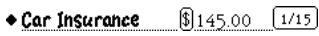
Tap the diamond to choose a balance to display.

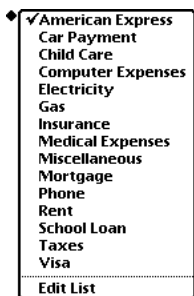
Tap here to mark a bill as paid or unpaid, send a bill to the Calendar, ToDo list, Pocket Quicken or Pocket Money; clear a bill, delete a bill, or create a new bill.

## Entering Bill Items

The Bills column in your Bills to Pay list is where the item to be paid is entered. You can tap the diamond to the left of each line to choose a bill item from the default list or you can write in a new item by hand or with the MessagePad keyboard.

### To enter a bill item

- 1 Write the item on the line you want it to appear; or,  

- 2 Tap the diamond to the left of the line you want to enter an item in and tap the desired bill item from the list. The list will close and the bill item will be entered.



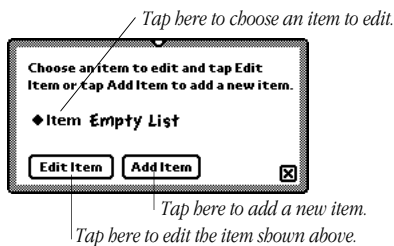
**Important** If you have more characters in an item than Bills to Pay can display, an ellipsis (...) will indicate that the item was truncated.

## Customizing the Bills Pop-up List

Bills to Pay allows you to customize any Bill Items list to display any number of items of your choosing. By customizing the list to include bills you pay often, you will save time entering bill information. If you customize the items from within a Bills List, the changes you make will apply to that list only, or to any duplicates you make of that list. To customize the Bill Items list so that the information applies to all new lists of a certain type, see Preferences later in this manual.

### To customize the bills pop-up list

- 1 Tap any of the diamonds in the Bills column.
- 2 Tap List Items, tap Edit List.
- 3 In the Edit List Slip, tap Add Item, or Edit Item.



- 4 Write in the new item and close the slip.
- 5 Repeat steps three and four until your list is complete.
- 6 Close the slip.



## Entering Amounts

The Amount column in your Bills to Pay list is where you enter the payment due or cost of the item in the adjacent line. You can enter an amount by writing it in or by using the Newton keypad.

### To enter an amount

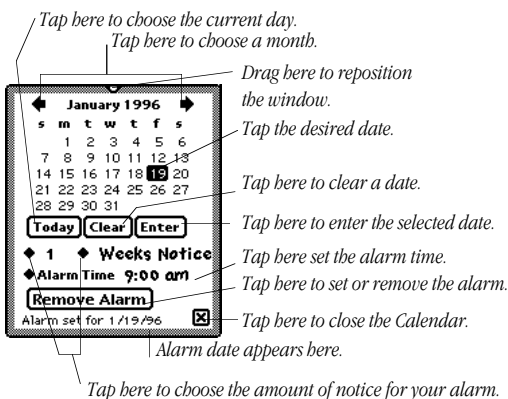
- Write the amount on the line you want it to appear.

## Entering Dates and Alarms

The Due Date column in your Bills to Pay list is where you enter the date the bill must be paid by; or the date you incurred a bill, if you are tracking expenses.

### To enter a date

- 1 Tap the box you want to enter a date in. A floating calendar appears.



- 2 Select the month and day you want and tap Enter. To clear a date field, tap Clear. To enter the current date tap Today, then tap Enter.
- 3 Tap  to close the calendar, or if you want to set an alarm follow the steps below.

**Important** To save time, enter all of the bill due dates together. Choose the date and alarm, if desired, for the first bill, tap Enter, tap the date box of the next bill choose a date and alarm, if desired, and tap Enter. Continue until you enter all of your dates and alarms.

If the Calendar is obscuring a bill while you are entering dates, you can drag it to a different location on the screen.

#### To set an alarm

- 1 Tap the diamond to the left of the 1 to open the pop-up list. Choose the desired interval number.
- 2 Tap the diamond to the left of Weeks Notice to open the pop-up list. Choose the desired notice interval and time.
- 3 Tap the Set Alarm button. The button will change to Remove Alarm, indicating that an alarm is now set for that bill item. You can remove the alarm for that bill item by tapping the Remove Alarm button. Also note that the date the alarm is set for appears at the bottom of the Calendar.

**Important** You can set an alarm for each item in your Bills List, if you choose. Please note that you must fill in the bill item, amount (even if it is zero), and due date before you can set an alarm for a bill item. If all items are not filled out, Bills to Pay will put up an alert requesting that you fill out all of the bill items.

**Important** When setting an alarm, it is important to be sure that the notification you are requesting is realistic. For example, if the bill is due five days from the day you enter it, Bills to Pay will not be able to set an alarm for one week's notice. If Bills to Pay is unable to set an alarm for the specified notification interval, it will put up an alert requesting a new alarm setting.

## Entering Your Available Funds

Available Funds are entered in one of two ways. The amount can be written into the field, or, if you have Pocket Money or Pocket Quicken or a financial package that supports the Pocket Money Financial Posting Standard installed on your MessagePad, you can choose an account balance from your financial package as your available funds.

### To write in an amount

- Write the desired number on the line.

Available Funds...     \$ 5,000.00 .....

### To get the Available Funds from a Pocket Money or Pocket Quicken account

- 1 Tap the diamond next to Available Funds to see a list of your accounts. Pocket Money or Pocket Quicken must be installed for accounts to be available.

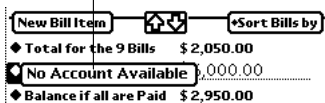
Checking
Pocket
Savings
Visa
.....
None

*If Pocket Money or Pocket Quicken is installed, tap Available Funds to choose a balance from a Pocket Money or Pocket Quicken account.*

- 2 Tap an account to automatically enter its balance in the Available Funds line.

**Important** Pocket Money or Pocket Quicken must be installed on your MessagePad in order to get and send balance and payment information between Bills to Pay and either of the two programs. If Pocket Money or Pocket Quicken is not installed, the pop-up states that no accounts are available.

*If neither Pocket Money or Pocket Quicken are installed, 'No Account Available' will be displayed and you must write in your balance.*





The Available Funds amount displayed does not automatically update after you send items to Pocket Money or Pocket Quicken. If you want to update the available funds, first send all desired items to Pocket Money or Pocket Quicken, then tap Available Funds and choose your account again.

The available funds will also update when you scroll to another Bills List and back, close and reopen the Bills List, or close and reopen Bills to Pay.

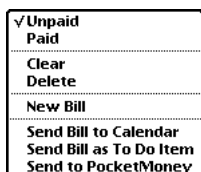
If you do not want the available funds you retrieved from the Pocket Money or Pocket Quicken account to update, after choosing the available funds from your Pocket Money or Pocket Quicken account, choose None from Available Funds pop-up. This will keep Bills to Pay from updating the available funds.

## The Bill Action Button





The Bill Action button  is used to change the status of a bill, or to create, delete, or add bills in a Bills List. You can also post bills to Pocket Money or Pocket Quicken or send them to the MessagePad's Calendar or ToDo list. When you first create a list, all Action buttons are set to .

### To change the status of a bill


- 1 Tap the Bill Action button .



- 2 Choose Paid, Unpaid, or Send to Pocket Money or Pocket Quicken (if installed). The Bill Action button changes to reflect the new status, as shown below.

-  *Not paid and not sent to Pocket Money or Pocket Quicken.*
-  *Paid, but not sent to Pocket Money or Pocket Quicken.*
-  *Sent to Pocket Money or Pocket Quicken, but not paid.*
-  *Paid and sent to Pocket Money or Pocket Quicken.*


### Clearing a Bill

Information can be cleared from a bill. Clearing a bill does not delete it from the list. It clears information entered. If you accidentally clear a bill, you can immediately tap Undo  to restore it.


### **To clear a bill**

- 1 Tap the Bill Action button .
- 2 Tap Clear.

### **Deleting a Bill**

You can entirely delete a bill from a list if you choose. This deletes all of the information in that bill and moves the rest of the bills up in the list. If you accidentally delete a bill, you can immediately tap Undo  to restore it.


### **To delete a bill**

- 1 Tap the Bill Action button .
- 2 Tap Delete.

### **Inserting a Bill**

By default a list contains one bill. You can insert as many more bills in a list as you like.

### **To insert a bill in a list**

- Tap the Bill Action button  and choose New Bill; or tap New Bill Item. The list will scroll up, if necessary, and the new bill will appear at the bottom.

### **Sending Bills to the Calendar**

You can send any of your bills to the MessagePad's Calendar or ToDo list. The bill payee, amount and date due are sent in the form of a Bills to Pay reminder. To avoid duplication, the alarms are not transferred. The bill due date is the date to which it is sent to the Calendar or ToDo.

## To send a bill to the Calendar

- 1 Tap the bill's Action button .
- 2 Tap Send Bill to Calendar or ToDo.

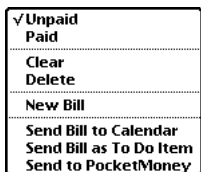
**Important** Sending a bill to the Calendar or ToDo does not change its status in Bills to Pay.

## Sending Bills to Pocket Money or Pocket Quicken

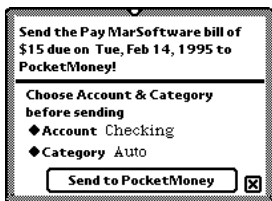
Users who have Pocket Money or Pocket Quicken installed can send bills to any active Pocket Money or Pocket Quicken account.


### To send a bill to Pocket Money

- 1 Tap the bill's Action button .
- 2 Tap Send to Pocket Money.



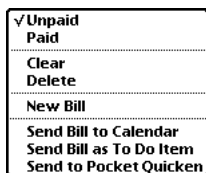
- 3 Tap the diamonds to choose an Account and Category.



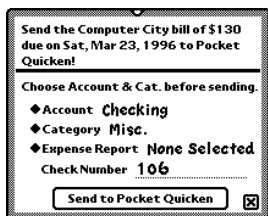
- 4 Tap the Send to Pocket Money button. The Action button for that bill will invert  to show that it has been sent to Pocket Money.

### To send a bill to Pocket Quicken

- 1 Tap the bill's Action button .
- 2 Tap Send to Pocket Quicken.



- 3 In the posting slip that appears, you must choose an Account and Category. The Expense Report is optional. Note that Bills to Pay displays *all* of your Pocket Quicken categories in a single scrolling list. The items in the Category list appear in the order in which they are stored in Pocket Quicken.






If you choose a checking account, Bills to Pay displays the next check number in sequence for that account. You can change the check number by scrubbing it out and writing in a new one. If you delete the check number from the posting slip, the transaction will be posted to that checking account as a withdrawal rather than as a check.

To transfer funds between accounts, choose the account you are transferring from in the Account pop-up. From the Category pop-up, choose the account you are transferring to. The transfer accounts appear at the end of the category list.

You may leave the category blank by choosing the blank category near the end of the Category scrolling list.

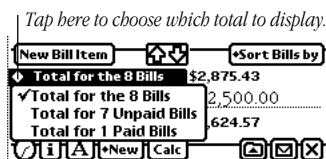
- 4 Tap the Send to Pocket Quicken button. A beep will indicate that the transaction has been posted, and the Action button for that bill will invert  to show that it has been sent to Pocket Quicken.

### **Changing totals displayed**

You can set Bills to Pay to display one of three totals: total for all bills in the list, total for unpaid bills in the list, and total for paid bills in the list.

## To change the total displayed

- 1 Tap the diamond to the left of Total at the bottom of the Bills List.



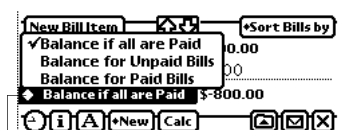
- 2 Choose any of the three options.

## Changing balances displayed

You can set Bills to Pay to display one of three balances: the balance if all bills are paid, the balance for unpaid bills, or the balance for paid bills.

### To change the balance displayed

- 1 Tap the diamond to the left of Balance at the bottom of the Bills List.



*Tap here to choose which balance to display in the current list.*

- 2 Choose one of the options.

## Sorting a Bills List

Bills to Pay allows you to sort your Bills List by bill name, status, amount, or due date.

### To sort your list

- 1 Tap the heading of the column you wish to sort by, or
- 2 Tap the Sort by button and choose from the pop-up.

An underline will appear under the column heading by which the list is sorted.

Tapping Bills sorts alphabetically by bill names. Tapping '\$' places unpaid bills at the top and paid bills at the bottom of the list. Tapping Amount sorts by amount in descending order. Tapping Due sorts by due date in ascending order.

## Scrolling Within a Bills List

If you have more bills than the screen can display, you can scroll your list up or down as needed.

### To scroll your list

- Tap either the up or down arrow.

*A solid arrow indicates that you need to scroll to view the rest of your list.*



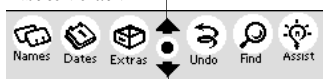
## Scrolling between Bills Lists

You can scroll from one open Bills List to another in the order in which they are sorted in the Overview.

### To scroll between lists

- Tap the up arrow to go to the previous list, or tap the down arrow to go the next list in the sort order.

*Tap here to go to the previous list in the sort order.*



*Tap here to go to the next list in the sort order.*

### Duplicating a List

There are two ways of duplicating a list within Bills to Pay. You can make an exact duplicate of the list you have open (except for the alarms), or you can duplicate the list for the following month. If you choose to duplicate the list for the following month, Bills to pay will revert the status of all bills to unpaid and will add one month to all due dates and alarms.

#### To duplicate a list exactly as it is

- 1 Open the list you wish to duplicate.
- 2 Tap the Action button  $\mu$ .
- 3 Tap Duplicate.


Your duplicated list will have the word copy appended to the name and will have the current creation date.


#### To duplicate a list for the next month

- 1 Open the list you wish to duplicate.
- 2 Tap the Action button  $\mu$ .
- 3 Tap Duplicate for Next Month.

Your duplicated list will have the word copy appended to the name and will have the current creation date. The status of all bills is unpaid, and one month has been added to all due dates and alarms.

### To delete a list

- 1 Open the list you wish to delete.
- 2 Tap the Action button .
- 3 Tap Delete.


If you accidentally delete a list, you can immediately tap Undo  to recover it.

**Important** When deleting a list that contains alarms, Bills to Pay will alert you that all alarms must be removed before the list can be deleted. Tap the OK button in the alert slip to delete the list and all of the alarms it contains.

### Filing Your Lists

Filing your Bills Lists can help you quickly and easily locate all lists of a given type. Although it is not necessary that you file your lists, this is a great organizational feature. For example, choosing your Business folder would let you see all of your business-related Bills Lists as well as their separate and combined totals in the Overview, so you could quickly get the total of your business spending.

### To file your list

- 1 With the list open, tap the File button .
- 2 Tap the desired folder.

**Important** Filing your Bills Lists by categories—all business Bills Lists in the Business folder, for example—allows you to see the Balance Summary for that category of Bills Lists in the Overview when that folder is open.

### **To Print, Fax, Mail, or Beam a List**

- 1** Open the list you want to print, fax, mail, or beam.
- 2** Tap the Action button  $\mu$  .
- 3** Tap Print List, Fax, Mail, or Beam. A slip will open.
- 4** Tap the diamond to the left of Format in the slip and choose a format. Bills to Pay offers two print formats: Bills List and Unpaid Bills List. The first prints all items in the list, the second only the unpaid bills.
- 5** Follow the prompts to complete your request.

### **To clear list alarms**

- 1** Open the list whose alarms you want to clear.
- 2** Tap the Action button  $\mu$  .
- 3** Tap Clear List Alarms.

**Important** To choose Clear List Alarms from the Action pop-up, you must have a list open. To clear alarms from all of your Bills to Pay lists, see Preferences.

## Chapter 6 Preferences

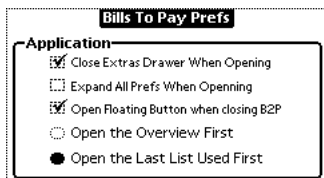
The Bills to Pay Preferences are divided into four parts: Application preferences, Bills List preferences, Alarms preferences, and Registration. Each part is described below.

### To open the Preferences

- 1 Tap the Info button ⓘ in either the Overview or Bills List.
- 2 Tap Prefs in the pop-up list.

### Application Preferences

The Application preferences allow you to determine where you want Bills to Pay to open to, whether you want the Extras Drawer to close when Bills to Pay opens, whether you want to view the Bills to Pay preferences expanded, or as a list. Whether or not you want the floating button to appear when Bills to Pay is closed and whether you want Bills to Pay to open to the Overview or the last used list.

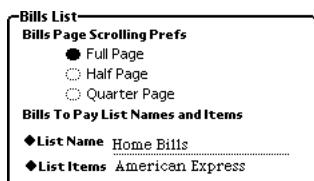


## Bills List Preferences

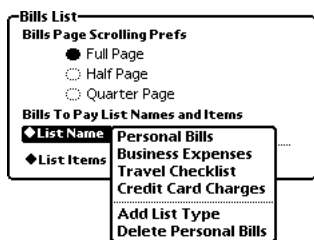
The Bills List preferences allow you to determine how much of a Bills List page scrolls at one time. The default setting is shown below. You can also create new List Types and customize list items for each List Type.

### To create a new List Type

- 1 Scroll to the Bills List preferences.



- 2 Tap Add List Type.



- 3 Scrub out Empty List Type and write in the name of your new List Type.

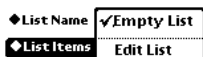
### To customize a List Type's pop-up

- 1 Make sure the List Type you want to customize is selected in the List Name pop-up.

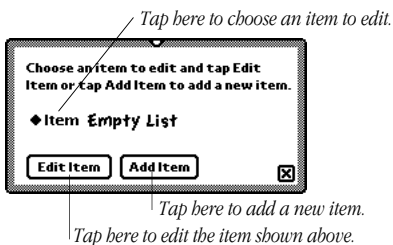


2 Tap List Items.

3 Tap Edit List.



4 Tap Add Item to add a new item, or choose an existing item from the Item pop-up and tap Edit Item to change or delete it.

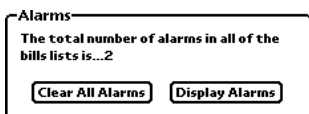


5 Write the new item in the slip and close the slip, or use the delete button to remove or change an existing item.

6 Continue adding or editing until you are done.

## Alarms

The Alarms section of the preferences shows the total number of active alarms in all Bills Lists. From the preferences you can tap the Clear Alarms button to clear all active Bills to Pay alarms in all Bills to Pay lists. The Display Alarms button displays a scrolling list showing all active Bills to Pay alarms, including each bill item, amount due, due date, and alarm date.



## Accounting Program Support

Choose which installed accounting program you want to exchange information with. Bills to Pay supports Pocket Money and Pocket Quicken. If no accounting program is installed, no options will be available in this preference and a message stating 'No accounting packages are installed.' will display.



## Registration

The Registration section of the preferences shows your serial number if you are registered, or a registration reminder if you are not.

<b>Registration</b>	
<b>Your Registration No.</b>	0000
<b>Thank You for Registering!</b>	

## Chapter 7

# The Assistant, Calendar, Notepad, Stationery, and Localization

This chapter discusses the interaction between Bills to Pay and standard MessagePad functions such as the intelligent Assistant, the Calendar, the Notepad, Stationery, and support for localization.

### The Assistant

Bills to Pay supports the intelligent assistant. The assistant can do some tasks for you. In the case of Bills to Pay, the assistant can post bills, as well as find, fax, mail and print Bills Lists. Finding, faxing, mailing and beaming are standard MessagePad functions, covered in your MessagePad Handbook. Posting bills is specific to Bills to Pay and will be discussed here.

The assistant understands the following requests: pay, billed, pay bill, check, pay check, paid. Your written request must contain one of these words in order for the assistant to correctly interpret it. When choosing from the assistant's pop-up menu, only pay will appear as an option.

#### To use the assistant by writing or selecting text

- 1 Write your request in the Notepad or select text and tap Assist. The assistant will interpret your request and put up a confirmation slip containing the information you gave it.
- 2 If the information in the slip is correct, tap the Post Bill button to add the new bill to the open Bills to Pay list. If the information is not correct, it can be changed in the slip before posting the bill.

Tap the Bill Payee to choose a different item from the pop-up. The items displayed in the pop-up list correspond to the currently open Bills List. You can scroll to a different Bills List by tapping the up or down scroll arrows in the button bar. The choices in the Bill Payee pop-up list will change to reflect the choices in the Bills List you scroll to.

### **To use the assistant by tapping Assist**

- 1** Tap Assist. A slip opens.
- 2** In the slip, tap Please. A pop-up list opens.
- 3** Tap pay in the pop-up list.
- 4** Write the name of the bill, the amount and the due date on the line.
- 5** Tap the Do button. Bills to Pay opens and a confirmation slip is displayed.
- 6** If the information in the slip is correct, tap the Post Bill button to post the bill to the open Bills to Pay list. If the information is not correct, it can be changed in the slip before posting the bill.

If you close the slip without posting the bill, Bills to Pay will close.

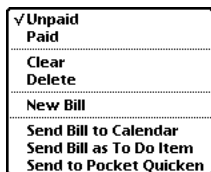
**Important** To speed up the process of using the assistant, write pay and tap Assist. This will bring up Bills to Pay immediately. You can then fill out the posting information in the slip and post the bill.

## Sending Bill Items to the Calendar

Bills to pay can send your bill items to the MessagePad Calendar. The bill's due date is the date to which the bill is sent in the Calendar. To avoid duplication, alarms are not sent to the Calendar.

### To send a bill item to the calendar

- 1 Tap the Bill Action button for the bill item you want to send to the calendar. A pop-up list opens.



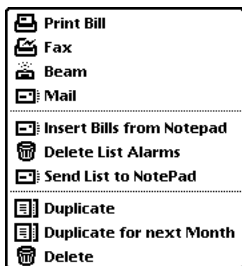
- 2 Tap Send Bill to Calendar. The MessagePad will beep to indicate the bill has been sent to the Calendar.

## Sending Bills Lists to the Notepad

Bills to Pay can send your Bills Lists to the Notepad. The name of the list, date created, bill items, bill due dates, bill amounts and status (paid or unpaid) are sent to the Notepad along with total, available funds and balance.

### To send A Bills List to the Notepad

- 1 Tap the Action button  $\mu$  at the bottom of the Bills List. A pop-up list opens.



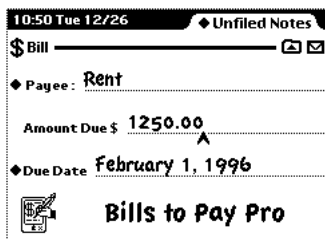
- 2 Tap Send List to Notepad. The list will appear, showing the current date, in the Notepad.

## Stationery

Bills to Pay supports the Newton 2.0 stationery feature. Stationery is available from the Notepad.

### To create Bill stationery

- 1 In the Notepad, tap New and choose Bill from the pop-up.
- 2 Fill out the Payee, Amount Due, and Due Date.

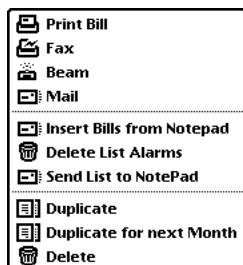


## To open Bills to Pay from a Bill stationery

- Tap the Bills to Pay icon.

## To bring Bill stationery items into a Bills List

- 1 Open the list you want to bring the items into.
- 2 Tap the Action button  $\mu$  and choose Insert Bills from Notepad.



All bills in the Notepad will be brought in. Bills to Pay will ask if you want to delete the inserted bills from the Notepad. Tap OK to delete them, or tap Cancel to leave them in the Notepad.

## Localization

When you choose a country in the MessagePad's Locale preferences, Bills to Pay will use the currency symbols, date formats and other available localization options provided by the MessagePad for that country. (With the exception of Canada, French, for which no currency symbol will be displayed.) These symbols will be used in the Bills Lists, when faxing, printing, beaming, mailing, sending bills to the Calendar or Bills Lists to the Notepad.



For more information on changing the locale, consult your MessagePad Handbook

## **Deleting Bills to Pay from the Extras Drawer**

If you scrub out Bills to Pay in the Extras Drawer, you will be presented with the alert: 'Are you sure you want to delete Bills to Pay?'

If you tap OK, you will be presented with a second alert: 'Do you want to permanently erase all Bills to Pay storage data and preferences? Click Cancel if you want to delete the program only.'

If you click OK, please be aware that all lists you created as well as the application and all attendant soups will be deleted. All Bills to Pay information will be lost. You cannot undo this action.

If you click Cancel when the second alert is presented, only the Bills to Pay application will be removed. All lists will remain.

**Important** If you click OK when the second alert slip appears, Bills to Pay, its data files, and preferences will all be deleted. YOU CANNOT UNDO THIS ACTION. ALL OF YOUR BILLS TO PAY DATA WILL BE REMOVED. ONCE REMOVED, THE DATA CANNOT BE RECOVERED.

## **Appendix A**

### **Troubleshooting**

If, at any time you experience erratic behavior with your MessagePad, it may be possible to correct it by pressing the reset button in the battery compartment

Erratic behavior is most often caused by internal memory problems. Resetting the MessagePad clears the internal memory and normally eliminates the problem. The reset button is inside your MessagePad's battery compartment.

It is also recommended that you backup and restore your MessagePad periodically. Backing up and restoring your MessagePad can recover memory that has become lost through normal use. Before you back up your MessagePad, check its available memory. Check the available memory again after restoring it. You should see a gain in the amount of available memory.

See your MessagePad Handbook for more information on synchronizing, resetting, and restoring your MessagePad.

#### **Out-of-Memory Messages**

If you experience out-of-memory messages after choosing to print, fax, or mail, close Bills to Pay as soon as the print, fax, or mail slip opens. This will ensure that enough memory is available for the MessagePad to print, fax, or mail the designated list or lists.

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## Colophon

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This manual was written, edited, and produced on a desktop publishing system using Apple® Macintosh PowerPC computers and Adobe® PageMaker™. Technical illustrations were drawn in Canvas™; screen shots were created with Newton Toolkit software and edited in Canvas. Proof pages were created on Apple LaserWriter printers. The final electronic manual files were created with Adobe PageMaker. PDF files were created using Adobe Acrobat Distiller™.