

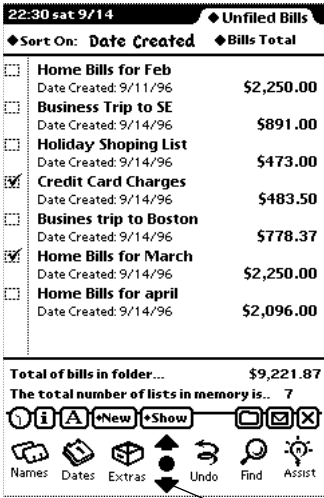
# **Bills to Pay Pro**

## **Self-Guided Tour**

**MAR Software**  
THE WAVE OF THE FUTURE

1801 Shore Line Drive, Suite 233B, Alameda CA 94501 USA  
(510) 337-0231

<http://www.marsoftware.com>  
email: [info@marsoftware.com](mailto:info@marsoftware.com)



1. 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.

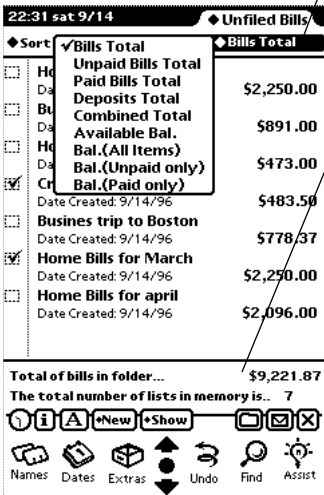
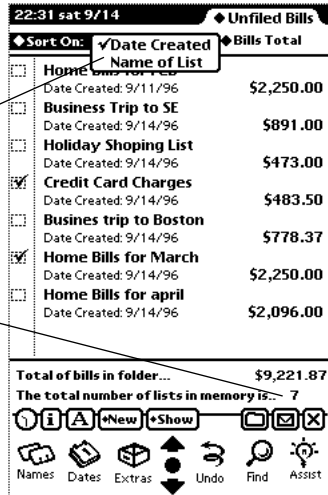
2. The Overview can be scrolled if it contains more lists than can be displayed in the available space.

3. Lists in the Overview can be sorted by name or by date created.

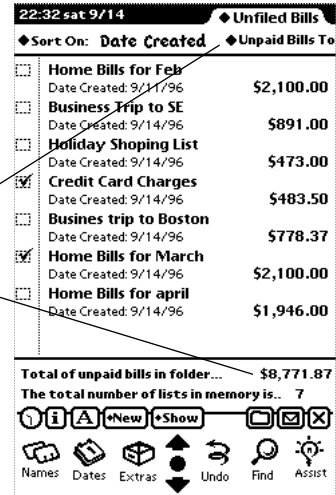
4. The total number of Bills to Pay Lists in all folders is displayed here.

5. Seven different balance options are available for viewing. Default is Bills Total.

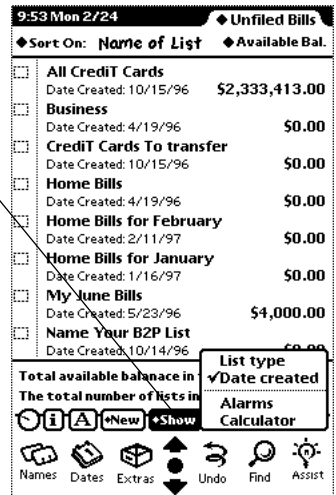
6. The option selected at the top, affects the sum displayed at the bottom of the Overview.



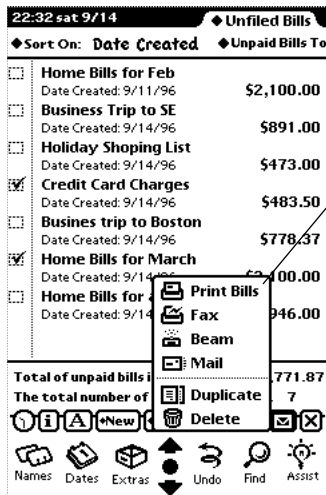
**7.** Change balance option to 'Unpaid Bills Total' to see different balances.



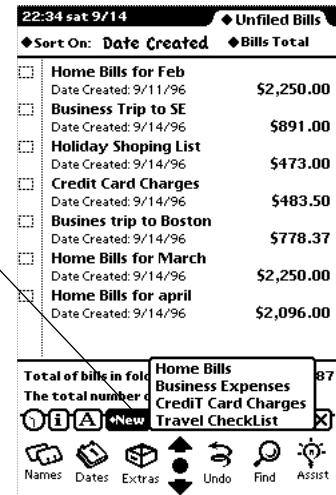
**8.** Tap 'Show' to choose to display the date each list was created, the list types, alarms, or the Calculator.



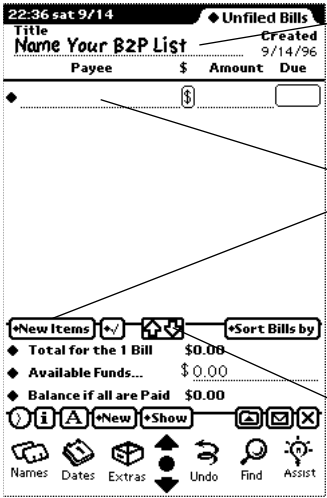
**9.** Tap several checkboxes to select multiple lists. Once selected, the lists can be printed, faxed, beamed, mailed, duplicated, or deleted by choosing the desired option from the Action button.



**10.** Tap the 'New' button to view the default list types used in creating new lists. You can customize existing list types, or add new list types in the Preferences. This will be demonstrated later in the Tour.



**11.** Tap 'Home Bills.' A new, blank list will appear.



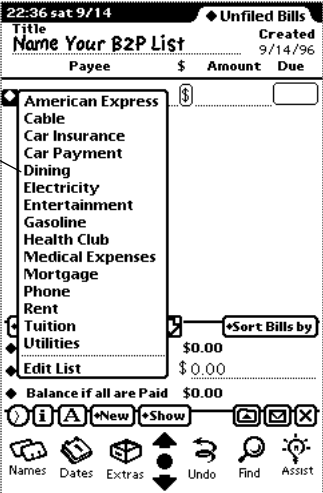
**12.** Scrub out the default list name and enter your own.

**13.** This is a blank bill. New lists contain one blank bill, you can add as many as you want by tapping 'New Item.'

**14.** If you add more bills than can be displayed in the available space, you can use these arrows to scroll your list.

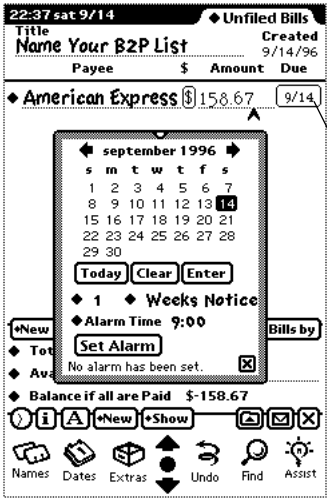
**15.** These are the default options included in the Home Bills list. These options speed up data entry and can be customized by tapping Edit List. Bills can also be written directly on the line instead of chosen from the picker.

**16.** Choose American Express.

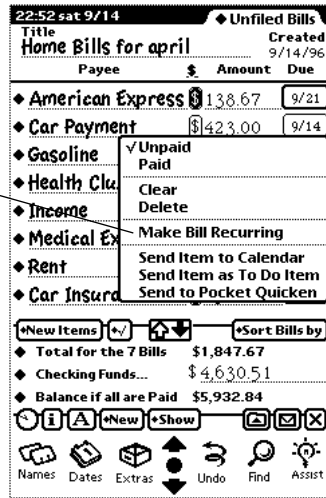


**17.** Write in an amount next to the \$ sign.

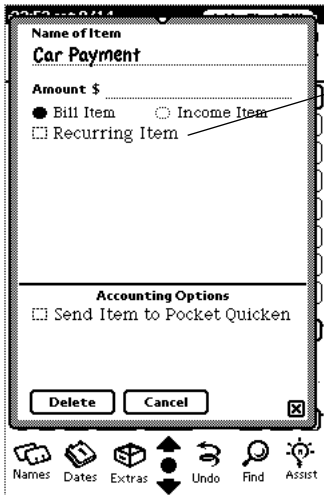
**18.** Tap the date button to open the Calendar. Tap a date and tap Enter. You can also set an alarm by specifying how much notice you want and tapping the Set Alarm button. Close the Calendar. You have now completed a bill. Now let's make it recurring.



**19.** To make a bill or deposit item a recurring transaction, tap its Action (\$) button and choose 'Make Bill Recurring.'

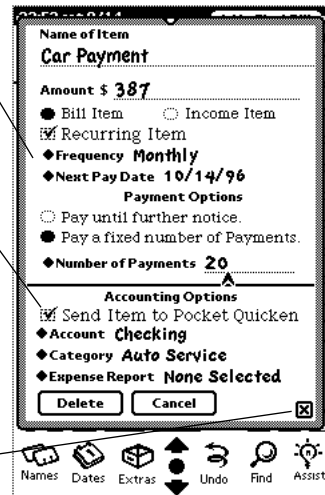


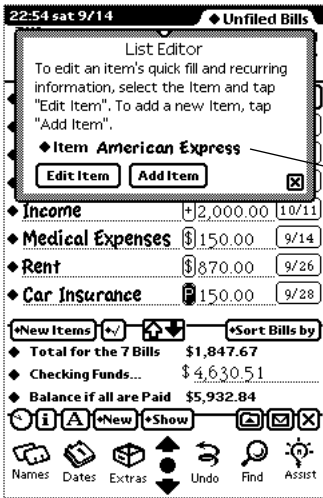
**20.** If you have not already filled out the bill information in steps 17 and 18, enter the item, amount, designate it as a deposit or a bill, and tap the 'Recurring Item' checkbox.



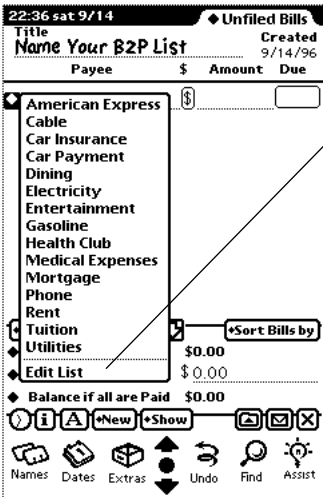
**21.** Choose the frequency, next pay date, and the desired payment options.

**22.** To add PocketQuicken or Pocket Money account information, tap the 'Send Item to PocketQuicken' (or Pocket Money) checkbox. Choose the account, category, and expense report information for the item. Tap the close box to save your settings.

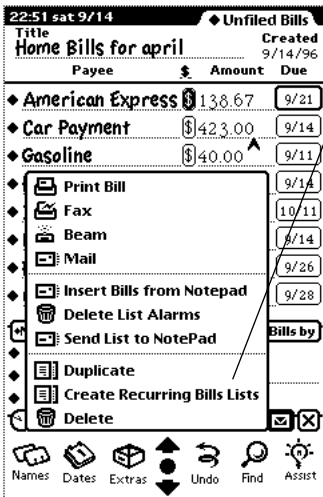




**23.** The List Editor remains on the screen. You can tap the Item picker and edit default items; or, you can tap the 'Add Item' button to add new items to the picker.



**24.** To remove an item from the list, choose the item from the Item picker. Tap 'Edit Item' and tap 'Delete.'



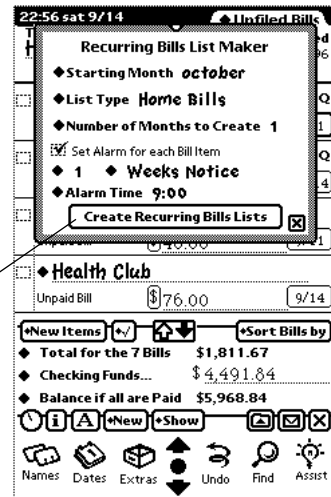
**25.** You can also add or edit recurring transactions by choosing 'Edit List' from the Bill picker. Once the 'List Editor' opens, proceed as described above.

**26.** Once you have entered all your recurring transactions, Bill to Pay Pro can create your next month's recurring bills list for you.

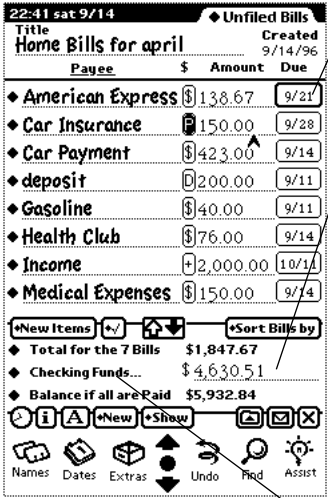
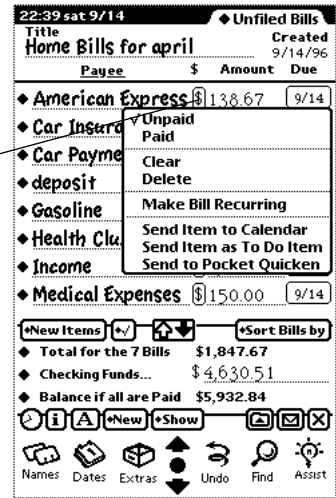
**27.** Tap the 'Action' button to view actions that can be performed on a list. Tap 'Create Recurring Bills Lists.' Choose the starting month, the number of months to create, and any alarm notification you want for your bills. Tap 'Create Recurring Bills Lists.'



**Note:** To create recurring bills lists, you must first designate bills and deposits as recurring transactions.



**28.** There are many actions that can be performed on a bill. Tap the '\$' to view them. Each bill can be marked paid, cleared, deleted, made recurring, sent to the Calendar, the To Do, Pocket Money, or Pocket Quicken (if either is installed). Mark a bill as Paid. Note that the \$ button changes to a 'P' to reflect the new status of the bill.



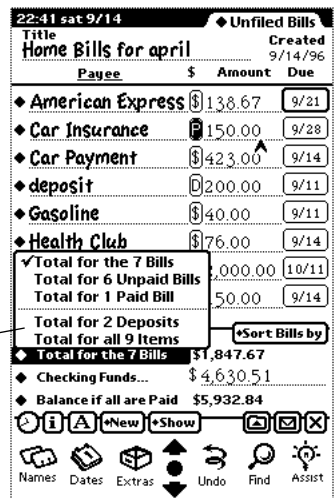
**29.** When an alarm is set for a bill, the outline for the date button is darker.

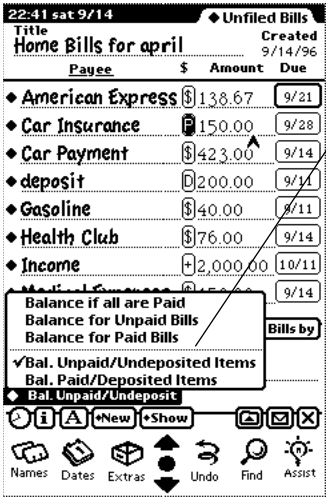
**30.** Enter your available funds here to see how much will be left after the bills in your list are paid.

**NOTE:** If you have Pocket Money or Pocket Quicken installed, tap the Available Funds picker to choose a balance from a Pocket Money or Pocket Quicken Account.

**31.** You can set Bills to Pay to display one of five totals: total for all bills, total of unpaid bills, total of paid bills, total of deposits, and total of all items.

**32.** Choose a different total option.





**33.** Bills to Pay Pro can display different balances for each list. You can choose to view the balance after all bills in the list are paid, the balance of the paid bills only or the balance of the unpaid bills. Choose a different balance option.

**34.** Bills Lists can be sorted by payee, status (\$), amount, due date, or checkmark. You can choose the sort order from the picker, or by tapping any of the column headings. The sort column is underlined.

**Payee** sorts alphabetically by payee name.  
**Paid Status (\$)** places unpaid bills at the top and paid bills at the bottom of the list.

**Amount** sorts by amount in descending order.

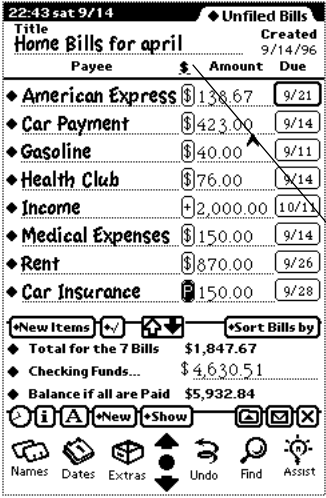
**Due Date** sorts by due date in ascending order. This is very useful because it lets you see immediately which bills are due next.

**Checkmark** puts checked items at the top and unchecked at the bottom.\*

**35.** Tap the Paid Status (\$) column heading. Note that bills marked paid are now at the bottom of the list. Also note that the Paid Status (\$) column heading appears underlined.

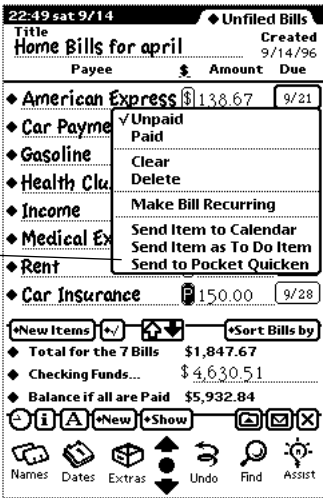


\* The checkmark option is available only in expanded view. Tap the 'Show' button and choose 'Expanded View.'



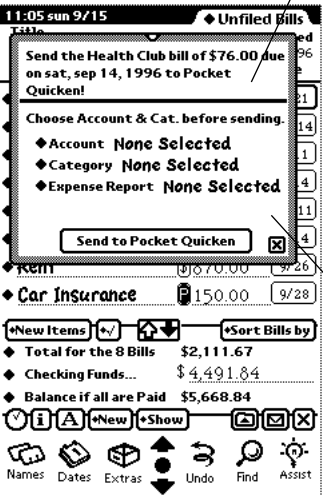


**36.** If you have Pocket Money or Pocket Quicken installed on your MessagePad, tap the \$ button and tap 'Send to PocketMoney,' or 'Send to Pocket Quicken.'



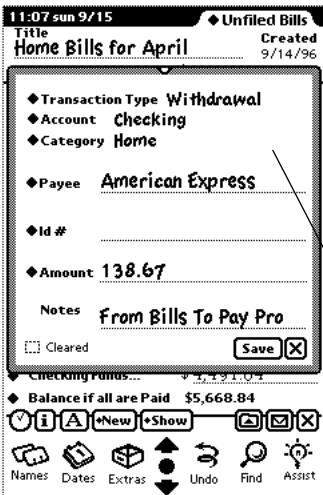
**NOTE:** PocketQuicken is shown here.

**37.** A posting slip appears showing bill information at the top. Choose an account, category, and expense report. All categories that you have active in Pocket Money or Pocket Quicken will appear in the Category picker, in alphabetical order.

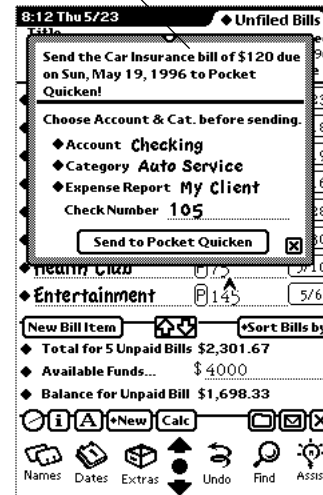


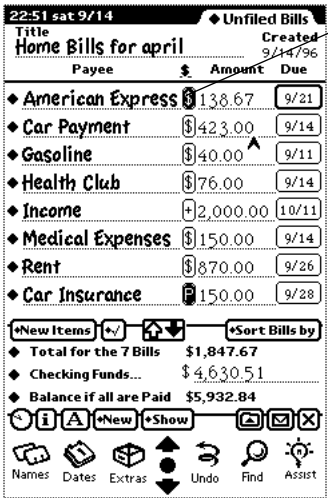
**NOTE:** PocketQuicken is shown in these examples.

**38.** If the account you choose is a checking account, the next check number in sequence will be displayed. You can scrub it out and change it, if necessary. Tap the 'Send to PocketMoney' or 'Send to Pocket Quicken' button.



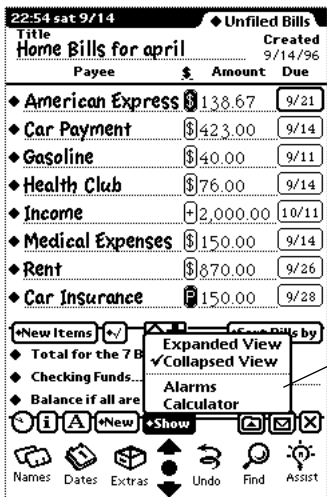
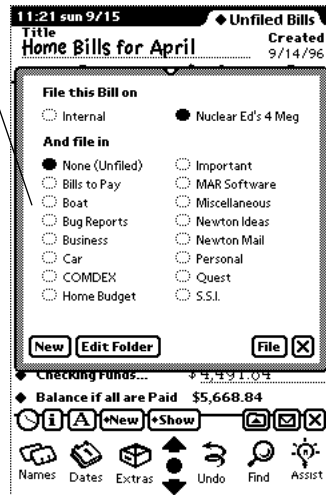
**NOTE:** For Pocket Money, enter your check number in the 'Id#' field. Pocket Money is shown here.





**39.** Note that the Status (\$) button inverts to show that the bill has been successfully sent to Pocket Money or Pocket Quicken.

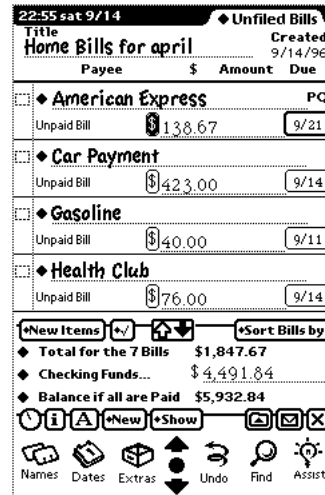
**40.** Individual lists can be filed into different folders. This is a great organizational feature. If all of your business lists are in a Business folder, the overview for that folder shows a summary of your business expenses to date.



**41.** The 'Show' button lets you toggle between expanded and collapsed views in the Bills List. You can also open the MessagePad's calculator.

**42.** Tap 'Expanded View.'

**43.** In expanded view you can select several items and perform an action on all of them at the same time.

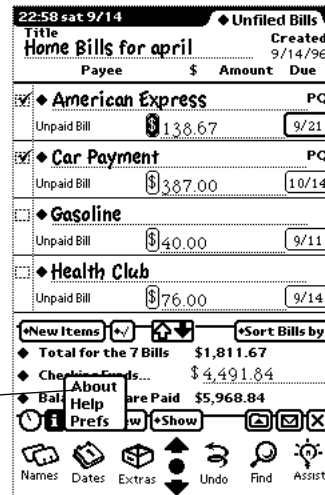


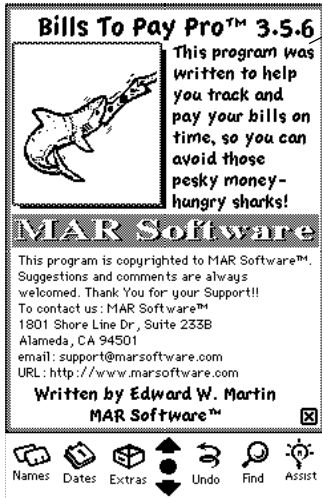
**44.** Check off several items.

**45.** Tap the '✓' button and tap 'Mark Checked Items Paid.'

**Note:** In order to send items to PocketQuicken or Pocket Money, first enter account and category information in the recurring bills slip for each item being sent, then select the item from the picker.

**46.** The 'Info' button is where you access the Help file, the About screen and the Preferences. Tap 'About' to see the About screen.



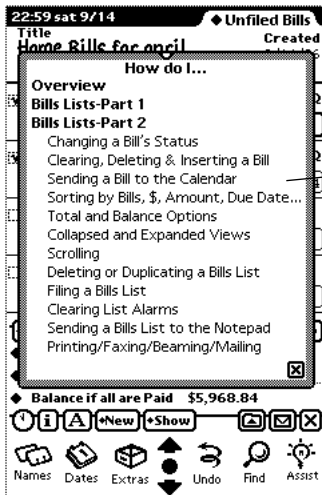
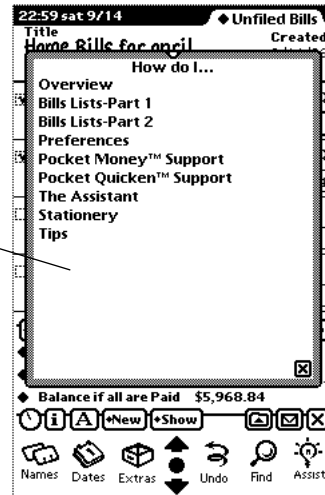


**47.** The About screen for Bills to Pay Pro contains information on contacting MAR Software.

Be sure to visit our website periodically for the latest information and updates on Bills to Pay Pro. For your convenience, our web site address is shown in the About screen: <http://www.marsoftware.com>.

**48.** Close the About screen and open Help .

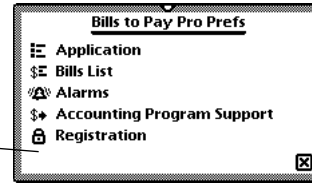
**49.** The list of topics in the Help screen appears. Tap Bills Lists-Part 2 to view the subtopics available.



**50.** Tap a subtopic for information on using that feature.

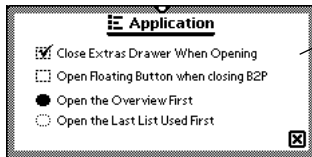
Close the Help file when you are through.

**51.** Open the Prefs to see how you can customize Bills to Pay Pro for your particular needs.



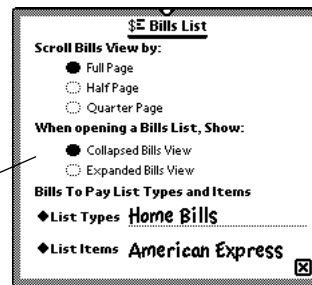
The Preferences are divided into five parts: Application preferences, Bills List preferences, Alarms preferences, Accounting Program Support preferences and Registration information.

Tap 'Application' to view the Application preference options.

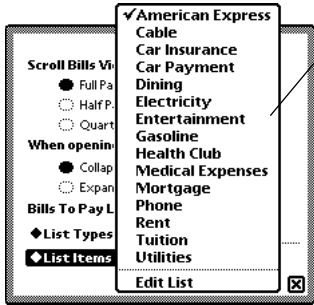


**52.** In the Application preferences, you can choose how the Extras Drawer, Bills to Pay Prefs and Floating button behave. You can also choose whether Bills to Pay opens to the Overview or the last-used list.

**53.** Scrolling and list view options are set in the Bills List Preferences. List types are added, deleted, and modified here also. Tap 'List Types.' Note the default list types and other options.



**54.** Tap Home Bills.

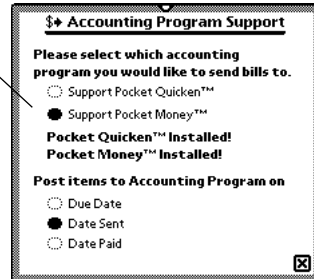
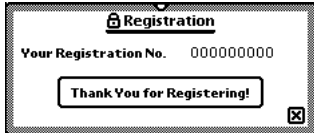


**55.** Tap 'List Items' to view the default items for the Home Bills list type. These items can be added to, deleted, and made recurring by tapping 'Edit List' and following the steps described earlier for making bills recurring.

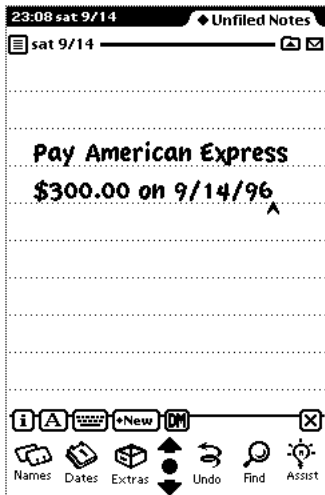
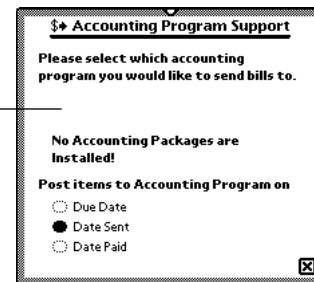
**56.** The Alarms preferences lets you view all alarms that are currently set by Bills to Pay Pro. You can also choose to clear all Bills to Pay Pro alarms.



**57.** Accounting Program Support lets you designate which accounting program you want to post your transactions to. You can also choose to post transactions on the date they are sent or on the date they are due. Close the Preferences.

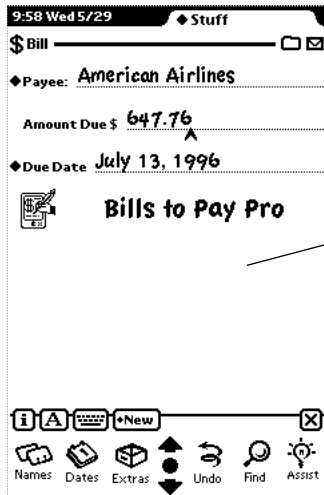
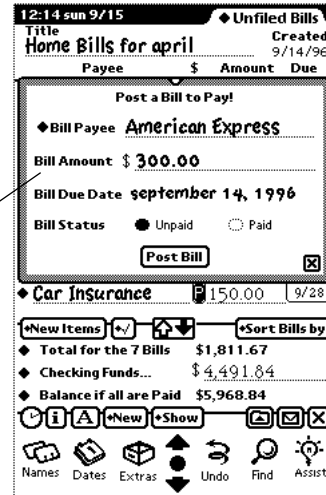


**Note:** If neither Pocket Quicken or PocketMoney are installed, no accounting program options will be available.



**58.** Another convenient feature is support for the Intelligent Assistant. Write a request such as 'Pay American Express \$300 on 9/14/96.' Select it, and tap Assist.

**59.** A posting slip appears showing the information you entered in the Notepad. You can make changes, if necessary. Tap the Post Bill button to post your Bill to your current Bills List.



**60.** Another convenient feature is the Bills Stationery. This lets you quickly jot down bill information without opening Bills to Pay Pro.

From the NotePad tap 'New' and tap 'Bill.' A Bill stationery item will open. Enter your information and close the stationery item.

At a later time, you can open a Bills List and import your stationery items into it.

# ***Congratulations!***

You have just completed the Bills to Pay Pro Self-Guided Tour. We hope that trying out these features has shown you the benefits of using Bills to Pay Pro.

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.

## **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.

## **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.

Bills to Pay Pro offers many more features, too. For more comprehensive and detailed information on features and use of Bills to Pay Pro, please refer to the *Bills to Pay Pro User Guide*, included with the retail product, or, download the electronic version from our website at <http://www.marsoftware.com>.

We at MAR Software would like to thank you for your interest in Bills to Pay Pro. If you have any questions or comments, please e-mail us at [support@marsoftware.com](mailto:support@marsoftware.com), or write to us at:

MAR Software  
1801 Shore Line Drive, Suite 233B  
Alameda, CA 94501 USA  
(510) 337-0231

Thank you again for your support! We hope to hear from you.