

Horizon Touch Reviewer's Guide



1 Overview

What is HorizonTouch?

HorizonTouch is a simple iPad application that uses a calendar interface to create budgets, forecasts, cash flows, or any other visualization of money over time. It can create and open multiple documents and exchange documents with Horizon for OS X.

Why is it different?

Horizon Touch (and Horizon for OS X) are the only applications available today that use the more intuitive calendar interface instead of the standard 'rows and columns' ledger interface. Horizon Touch lets you see, at a glance, where your money is coming from and where it is going.

How simple is it?

Very simple! Tap once to create a new document. Tap the 'Tools' icon to add a new category or child category. Tap the name of the category to edit it. Double-tap a date on the calendar to enter a new value. Swipe the calendar to move through the months. Repeat, modify, analyze as necessary.

2 Getting Started

When you start HorizonTouch for the first time, it will detect that there are no available documents and prompt you to create a new one. Tap the 'new' button to create a new calendar with a single, default category.

The Toolbar



Tap the **Calendars** button to return to the documents browser.

Tap the **Help** button to see the Instant Help. Tap again to hide the help.

The **Info** button brings up the category info popover. Change the category name, category color, and number formatting here.

Tap the **Tools** button to add or delete categories. The popover changes context depending on category selection.

The **Sharing** button lets you email, print, or share the document to a computer running iTunes.

A Little More About Categories

Categories are collections of like values, types of income or expense. You can group categories together under a parent category, and expand or collapse the parent. When you collapse the parent, it summarizes the children and places the summary amount at the right edge.

You can also hide or show categories by tapping the checkmark to the left of the category name. Hidden categories are not included in summary calculations.

Entering, Editing, and Repeating Values

Tap a category once to select it. Categories are color-coded by the background color of the checkmark box. Double-tap on the calendar in a day to add a value to that day. Use the numeric keyboard popup to enter a value, start with a minus sign if it is an expense or debit.



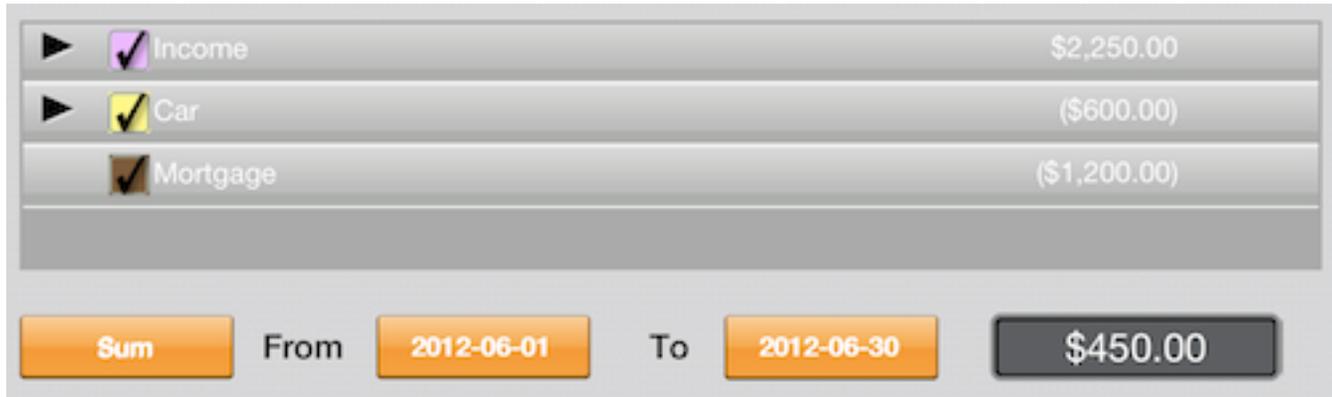
To edit a value, tap the cell once. Entering zero or an empty value will delete the cell.

Repeating Cells

Most financial transactions occur at a repeating frequency. Tap and hold on a cell to bring up the **Repeat** pop-over. Select a frequency, and the cell will repeat until you tell it to stop. Single cells in a series can be edited or deleted individually.

Summary Information

HorizonTouch carries out summary calculations for each category and category group, and then displays the grand total below the category list. The summary range defaults to the current month, but can be set to the period between any two dates.



The screenshot shows a summary interface with a list of categories and a summary bar. The categories are:

| Category | Value |
|----------|--------------|
| Income | \$2,250.00 |
| Car | (\$600.00) |
| Mortgage | (\$1,200.00) |

Below the list is a summary bar with the following controls:

- Sum** button
- From: 2012-06-01
- To: 2012-06-30
- Summary Value: \$450.00

Pressing the **Sum** button will display the summary type pop-up. The default is **Sum**, but you can also **Count**, **Average**, or find the **Maximum** or **Minimum**. The two date buttons let you change the date range for the summary.

3 Moving Forward

More Help

Detailed help is available from the Instant Help screen.

There are videos and F.A.Q.s available on the Lucerne Systems website at www.lucernesys.com

We can also be reached by email at support@lucernesys.com

Horizon Touch is also on Twitter @HorizonTouchApp

Please let us know if you have any questions.