

Sage Timeslips Shortcut Keys

Sage Timeslips provides many ways to access commands and dialog boxes. These shortcut keys are available in specific areas of Sage Timeslips. To access a command, press the key or keys indicated. For example, press **Ctrl+N** to create a new record. This means that you press and hold the **Ctrl** key, and then press the **N** key.

Slip List dialog box

New slip Ctrl+N
 Duplicate slip Shift+Ctrl+D
 Open slip Ctrl+O
 Find slip Ctrl+Shift+F
 Go to slip Ctrl+Shift+G
 Bookmark slip Ctrl+Shift+K
 Start/stop time on slip F5, Ctrl+Shift+T
 Print list of slips Ctrl+P
 Update slip list Ctrl+Shift+L
 Delete selected slip Ctrl+Del

Slip Entry dialog box

New slip Ctrl+N
 Duplicate slip Ctrl+Shift+D
 Clone field from the previous slip Ctrl+Shift+C
 Clone the rest of the fields Ctrl+Shift+E
 Add/remove bookmark Ctrl+Shift+K
 Use default rate Ctrl+Shift+L
 Update rate rule Ctrl+Shift+U
 Switch to slip list Ctrl+L
 Revert changes on slip Esc
 Save slip Ctrl+S
 Find slip Ctrl+Shift+F
 Go to slip Ctrl+Shift+G
 Move to first slip Ctrl+PgUp
 Move to previous slip PgUp
 Move to next slip PgDn
 Move to last slip Ctrl+PgDn

Date fields

Same as previous date S
 Today T
 Previous day <, +, Down
 Next day >, +, Up
 Calendar C

Transaction List dialog boxes

New transaction Ctrl+N
 Open transaction Ctrl+O
 Find transaction Ctrl+Shift+F
 Go to transaction Ctrl+Shift+G
 Print list of transactions Ctrl+P
 Update transaction list Ctrl+Shift+L
 Delete selected transaction Ctrl+Del

Transaction Entry dialog boxes

(ex: the Accounts Receivable Entry dialog box)

New transaction Ctrl+N
 Switch to transaction list Ctrl+L
 Revert transaction Esc
 Save transaction Ctrl+S
 Find transaction Ctrl+Shift+F
 Go to transaction Ctrl+Shift+G
 Move to first transaction Ctrl+PgUp
 Move to previous transaction PgUp
 Move to next transaction PgDn
 Move to last transaction Ctrl+PgDn

Report List dialog box

New report Ctrl+N
 Open report Ctrl+O
 Print report Ctrl+P
 Acquire filters from other windows Ctrl+Shift+F
 Move to previous page of reports Shift+F6
 Next to next page of reports F6
 Delete selected report Ctrl+Del

Report Entry dialog box

New report Ctrl+N
 Print report Ctrl+P
 Switch to report list Ctrl+L
 Acquire filters from other windows Ctrl+Shift+F
 Save report Ctrl+S
 Revert report Esc

Name List dialog boxes

(ex: Client List dialog box)

New name Ctrl+N
 Open name Ctrl+O
 Sort by Nickname 1 Enter, Ctrl+O
 Sort by Nickname 2 Shift+Ctrl+1
 Delete name Shift+Ctrl+2
 Delete name Ctrl+Del

Name Information dialog boxes

(ex: Client Information dialog box)

Name list Ctrl+L
 New name Ctrl+N
 Revert changes Ctrl+L
 Move to previous page of info Shift+F6
 Move to next page of info F6
 Save name Ctrl+S
 Move to first name Ctrl+PgUp
 Move to previous name PgUp
 Move to next name PgDn
 Move to last name Ctrl+PgDn

Name fields on slips

New name Ctrl+Shift+N
 Open name Ctrl+Shift+O
 Show nickname 1 Ctrl+Shift+1
 Show nickname 2 Ctrl+Shift+2
 Switch to task (from Expense field) Ctrl+Shift+3
 Switch to expense (from Task field) Ctrl+Shift+4

Description and notes fields

Select entire contents of field Ctrl+A
 Copy selected text to clipboard Ctrl+C
 Delete selected text and place in clipboard Ctrl+X
 Paste text from clipboard Ctrl+V
 Delete the selected text Ctrl+Del
 Revert the last entry Ctrl+Z
 Spell check the current word F4
 Spell check the entire field Shift+F4
 Grammar check the entire field Shift+F5
 Open list of abbreviations Ctrl+F7
 Insert private text indicator Alt+Ins

Sage Timeslips Shortcut Keys

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Accessing Billing Commands

Open Billing Assistant Ctrl+Shift+B
 Update Billing Assistant data Ctrl+Shift+L
 Generate bills (outside Billing Assistant) Ctrl+B
 Approve or clear a group of bills Ctrl+Shift+A
 Client billing history Ctrl+H
 Timekeeper billing history Ctrl+Shift+H
Accessing Lists of Data
 Slip list (time and expense entries) Ctrl+M
 Accounts receivable transaction list Ctrl+T
 Client funds transaction list Ctrl+F

Accessing Lists of Names

Timekeeper list Ctrl+U
 Client list Ctrl+I
 Client reference list Ctrl+Shift+R
 Task list Ctrl+Y
 Expense list Ctrl+Shift+Y
 Budgets list Ctrl+G

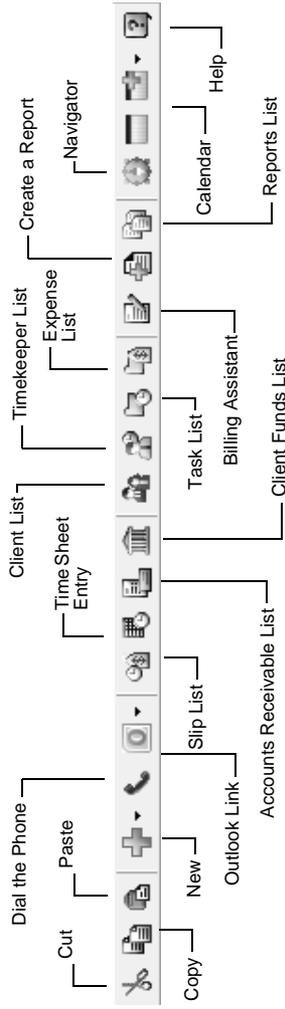
Other Common Commands

Show Navigator Ctrl+F10
 Close all dialogs, except the Navigator Ctrl+W
 Stop all timers for the current login Ctrl+F5
 Stop all timers in the current database Alt+F5
 Show summary of slip entry F9
 Switch to Mini Slip View Ctrl+Shift+M
 Report list Ctrl+R
 Dial the phone Ctrl+D

Sage Timeslips Main Toolbar

The following buttons are available on the main Sage Timeslips toolbar. You can choose to show or hide this toolbar in the *Interface* page of the *Personal Preferences* dialog box.

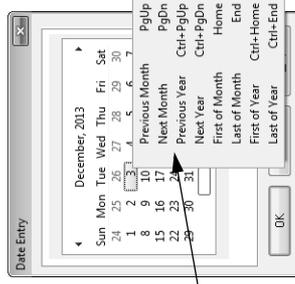
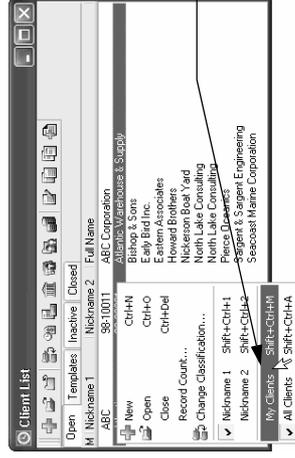
Pressing the **Shift** key clicking a *List* toolbar button is a shortcut to open the associated data entry dialog box. For example, **Shift**-clicking the **Client List** toolbar button opens the *Client Information* dialog box.



Sage Timeslips Shortcut Menus

Shortcut menus are available on any field within Sage Timeslips. Right-click on any field to open a menu of available commands specific to that field. Right-click on any area between fields to open a menu of available commands for the current dialog box.

Shortcut menus display common commands and include their keystroke combinations and toolbar buttons, when available.



Sage Timeslips

Upgrader's Guide

sage

License agreement

You can review the license agreement at any time. Within Sage Timeslips, select **Help>About Sage Timeslips**. A link on this page will open the license agreement.

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Technical support

Consult the Help system found in Sage Timeslips under the Help menu, or our web site at <http://na.sage.com/us/sage-timeslips> before contacting us for technical support.

For info on technical support, please click the Support heading on our web site.

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• Installing Sage Timeslips 2015 •

Introducing Sage Timeslips

Thank you for upgrading to Sage Timeslips 2015. For over 20 years, Sage Timeslips has been established not only as a leader in time and billing software but also as the standard by which other time and billing products are measured.

For more information about Sage Timeslips and Sage, visit our Web site at www.sagetimeslips.com or call 1-800-285-0999.

This chapter covers installing and starting Sage Timeslips 2015. Please note that this is not a comprehensive manual. It is a guide to help you install Sage Timeslips and become familiar with the new features and functionality offered by this upgrade.

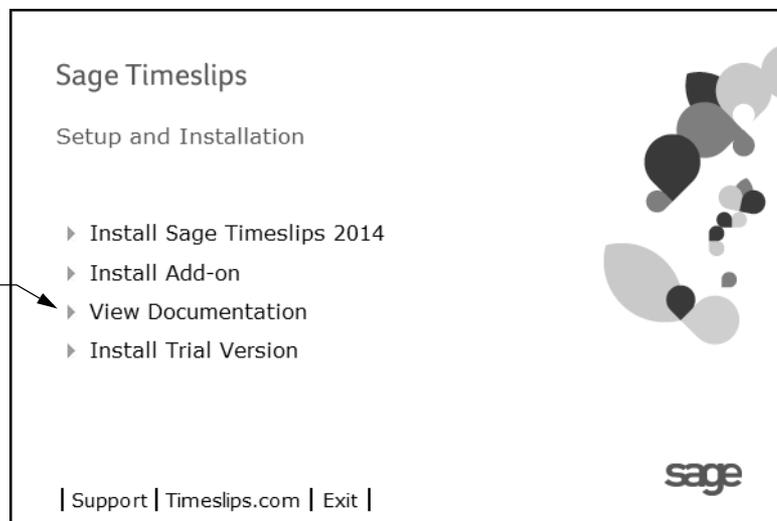
Other Reference Materials

Along with this upgrader's guide, Sage Timeslips offers extensive reference information in electronic format.

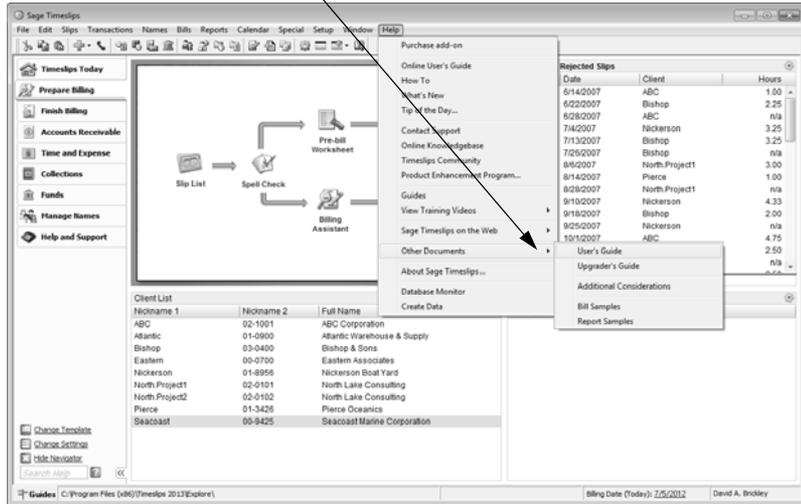
Additional PDF Files

Sage Timeslips provides additional guides in PDF format. You can access these guides during the installation process. After installation, you can access these guides from the **Help; Other Documents** submenu.

You can access additional PDF files through the installation files.



You can access additional PDF files through the *Other Documents* submenu of the *Help* menu.



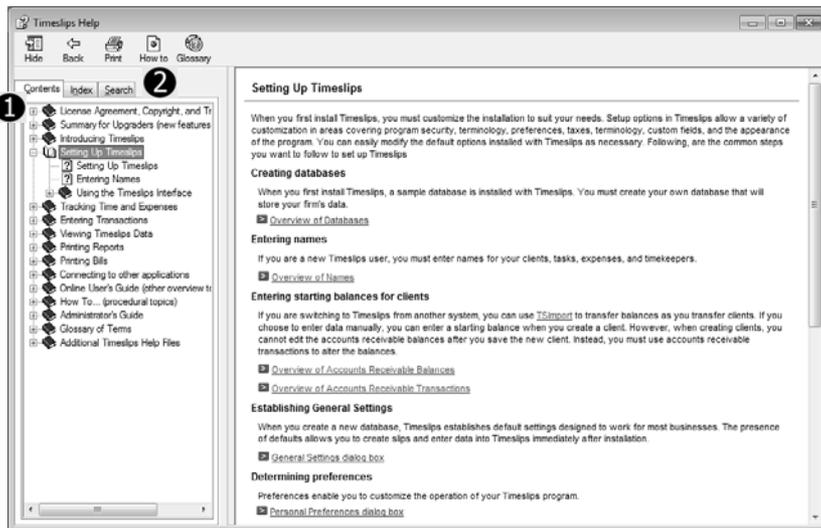
This submenu contains the following PDF files:

- **User's Guide** – Opens the user's guide for new users. This guide provides an overview of the major features of Sage Timeslips.
- **Upgrader's Guide** – Opens a copy of this upgrader's guide. This is useful if you want to print additional copies for other timekeepers.
- **Additional Considerations** – Opens a copy of the setup considerations available during installation.
- **Bill Samples** – Opens the sample bills guide. This guide provides examples of how you can design bills for your firm.
- **Report Samples** – Opens the sample reports guide. This guide provides samples of all reports and examples of ways to customize reports.

Sage Timeslips Help System

The Sage Timeslips Help system provides detailed information about each feature, as well as overview information about how features interact with each other, and step-by-step topics.

To access the Sage Timeslips Help system, click the **Help** toolbar button , click a **Help** button, or press F1 from any dialog box.



From the *Contents* page (1) open any book and choose a topic. Optionally use the *Index* or *Search* pages (2) to search for a topic.

Preparing to Upgrade

Because upgrading Sage Timeslips can involve some important decisions, we suggest that only the system administrator upgrade Sage Timeslips. Please review this entire section before attempting to upgrade Sage Timeslips.

Reviewing system requirements

Before upgrading Sage Timeslips, verify that your system meets the necessary hardware and software requirements. The following table lists the minimum and recommended requirements for using Sage Timeslips.

System Requirements and Recommendations

	Requirement	Notes
Operating system	Windows® 8 (excluding Windows RT), Windows® 7 Ultimate or Professional	See Microsoft's Web site or documentation for additional requirements.
Free hard disk space	300 MB free hard disk space for installation (excluding your database) 75 MB additional for database	Additional space required for database growth. Additional space required for some functions, such as when printing when printing bills to PDF.
Adobe Reader	Adobe® Reader® to review PDF files (Adobe Reader v11 is included with the Sage Timeslips Installation)	25 MB hard disk space additionally required.
Display/Monitor	Display supporting 1024x768; 1024x768 or higher recommended	
Peripherals	PC-compatible keyboard, mouse, and printer; printing on both sides of paper requires duplex compatible printer Modem if using the dialing features within Sage Timeslips. Scanning functionality in Slip Attachments and Document Access requires TWAIN-compatible scanner Sound card and speakers recommended for enhanced interaction. Microphone or headset required for Speech Recognition support	Printing on both sides of paper requires duplex-compatible printer
Network connectivity	If using Sage Timeslips in a multiple-user environment, a network adapter appropriate to your type of network Internet connection required for using Sage Timeslips web features, such as Sage Timeslips eCenter.	Highest quality network hardware possible.
Integration	Sending bills and statements by email requires MAPI-compliant email program such as Microsoft Outlook®; not compatible with Outlook Express and AOL® email MAPI-compliant email program required for sending bills and statements by email, or reprinting bills to email. Microsoft Outlook 2013, 2010, or 2007 required on the Sage Timeslips workstation for using the Outlook Link, or receiving slips by email. Microsoft Word 2013, 2010, or 2007 required for mail merge functionality and viewing enhanced RTF Microsoft Excel 2013, 2010, or 2007 required for using the Print to Excel feature. Internet Explorer required to access web pages from Sage Timeslips.	

Finding the serial number and configuration code

You will need your serial number and configuration code (also referred to as an activation code) to install Sage Timeslips, register Sage Timeslips, and to receive technical support (if necessary). Sage sent this information to you in an email message shortly after you purchased your upgrade.

Preparing your database

Before upgrading your installation of Sage Timeslips, follow these procedures to prepare your Sage Timeslips data for conversion.

Making a Sage Timeslips backup



Before starting the installation procedure or following any other instructions in this section, we recommend that upgraders create a backup of their Sage Timeslips database(s) to the hard drive. Backups are your best defense against problems with data.

When creating Sage Timeslips backups, use a unique name for backup files. For example, if today's date is December 01, 2013, you could name a backup file **UPGRADE-12012013.bku**. If your firm uses multiple databases, back up each one before upgrading Sage Timeslips. Provide a unique name for each backup file.

Chapter 2 of this guide "Converting Sage Timeslips Data" provides detailed information about converting your Sage Timeslips data.

Installing the latest Sage Timeslips service release

We may periodically provide updates for Sage Timeslips to address any known issues. Before upgrading, we suggest that you visit our web site to verify that you are using the latest Service Release.

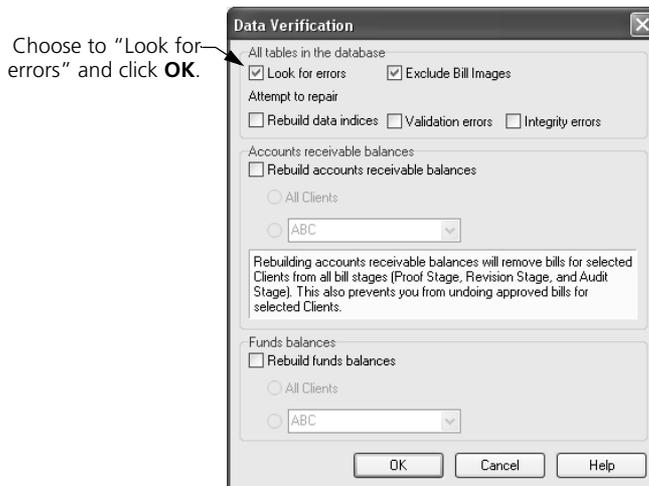
For example, if you are upgrading from Timeslips 2013, verify that you are using the latest service release for Timeslips 2013.

Within your current version of Sage Timeslips, you can check for an update. Select **Help; Sage Timeslips on the Web; Download Latest Update**. Sage Timeslips will open the appropriate page on our web site where you can download any necessary service releases. Review any information that accompanies the Sage Timeslips service release for additional installation instructions.

Verifying the integrity of your Sage Timeslips data

The Sage Timeslips data verification utilities, which are available in Timeslips v9 and later, allow you to check the structure and integrity of your Sage Timeslips database. In some cases, database errors might not display to Sage Timeslips users when data corruption is present. You can use these utilities to search for database errors before installing your Sage Timeslips upgrade.

Before installing Sage Timeslips 2015, make a backup in your current version (see “Making a Sage Timeslips backup” on page 6). Next, use the *Data Verification* dialog box (select **File; Data Verification**) in your current version to verify the integrity of your database. Mark only **Look for errors** and click **OK** to search for errors.



If Sage Timeslips encounters any validation, linking, or integrity errors during the verification process, please contact the Technical Support department to evaluate and correct the errors before installing your upgrade. We do not suggest that you attempt to repair errors on your own.

Purging unnecessary data

Large databases can take additional time to convert. Before installing your Sage Timeslips upgrade, you can purge unneeded slips (which are slips that you no longer need to report on) from your current version of Timeslips. We suggest that you do not purge accounts receivable transactions because payment distribution data affects many reports.

You can find additional information about purging data in the online Help of your current version. Please remember to always make a backup before purging data.

Upgrading Sage Timeslips

The following sections provide detailed upgrade installation instructions.



You can install Sage Timeslips in many network environments. Our online knowledgebase includes detailed installation instructions for some of these specific network environments. Within Sage Timeslips, select **Help; Online Knowledgebase** to see if we have installation instructions for your environment.

Downloading the installation file

When you purchased the Sage Timeslips 2015 upgrade, Sage sent you an email message that contained your serial number and configuration code (or activation code), along with a link to download the installation file.

You must download the installation file (**SageTimeslips2015.exe**) to follow the instructions below.

Installing the upgrade

How to Install the Sage Timeslips upgrade

- 1 Start Windows. If any other applications are open, please close them now.
You must log into Windows with administrator rights to install Sage Timeslips. However, you do not need administrator rights to use Sage Timeslips.
- 2 Download the Sage Timeslips installation file. If the installation process does not start automatically, start the installation by double-clicking on the Sage Timeslips download file (**SageTimeslips2015.exe**). The download file will extract the necessary installation file and will open a menu of options.
- 3 Click **Install Sage Timeslips 2015**. The *Welcome to Sage Timeslips Setup* view opens.
- 4 Click **Next** to continue the installation procedure. The *Software License Agreement* view opens.
- 5 Installing Sage Timeslips indicates that you agree to the terms of the Software License Agreement. After reading this agreement, select **I accept the terms of the license agreement** if you agree to the terms and then click **Next**. The *Enter Configuration Code* view opens.
- 6 You must enter a valid configuration code (activation code) to install Sage Timeslips. Sage sent this code to you shortly after you purchased the upgrade. After entering the code, click **Next**.

- 7 Verify that the Sage Timeslips configuration settings correspond to the code that you entered. If the configuration settings are correct, click **Next**, otherwise click **Back** to re-enter your code.
- 8 On the *Select the Destination Folder* view, select the folder where you want to install the Sage Timeslips upgrade. You should install Sage Timeslips 2015 over your previous version of Timeslips.

If you are upgrading a network installation, first install Sage Timeslips 2015 to the Sage Timeslips server. After completing the installation on the server, you can then install the upgrade on local workstations (see “Installing Sage Timeslips locally” on page 10 for these steps).

All network users must have Change file rights (Read, Write, Execute, and Delete) for the installation folder in order to install or use Sage Timeslips.

After selecting the appropriate drive and folder, click **Next** to continue.

- 9 Select the type of installation that you want the Setup program to perform. We recommend that you perform a **Complete** installation. Performing a **Custom** installation may omit some components.

Click **Next** to continue. The *User Information* view opens.

- 10 Enter your user name, company name, and Sage Timeslips serial number in the corresponding fields of the *User Information* view. Your Sage Timeslips serial number is located on the Configuration Codes sheet. After entering the appropriate information in the corresponding fields, click **Next** to continue.

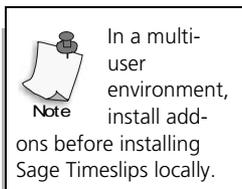
- 11 The Setup program is ready to install Sage Timeslips on your workstation or network drive. If you want to change any of the Setup program settings, click **Back**. Otherwise, click **Install** to begin installing Sage Timeslips.

After copying the necessary program files to your computer, the *Select Program Folder* view opens.

- 12 Select the program folder where you want to create Sage Timeslips shortcuts. Click **Next** to continue.

- 13 Sage Timeslips completes the installation procedure. Choose additional options (creating desktop shortcut, installing Adobe Reader, reviewing the readme document, or checking for program updates) and click **Finish**.

Installing additional licenses and other add-ons



You can enhance Sage Timeslips by purchasing additional products, station licenses, or functionality called Sage Timeslips *add-ons*. You can install add-ons directly from the Sage Timeslips installation CD-ROM.

How to install Sage Timeslips Add-Ons

- 1 Within Sage Timeslips, select **Help; Purchase Add-on**.
- 2 Enter the configuration code (activation code) for your Sage Timeslips Add-On product. This code was sent to you in an email message. Click **Next**.
- 3 Verify that the configuration code corresponds to the Sage Timeslips Add-On feature that you want to install.

If the configuration settings are incorrect, click **Back** to re-enter the code; otherwise, click **Next** to continue.
- 4 Sage Timeslips will indicate when your installation is updated. Click **Done**.

Installing Sage Timeslips locally

After installing Sage Timeslips on a network drive (on the Sage Timeslips Server), you can quickly update each workstation that has Sage Timeslips installed already by opening Sage Timeslips. When you launch Sage Timeslips on each workstation and the upgrade process will begin automatically.

To install Timeslips on additional workstations, follow the steps below. The local installer copies Sage Timeslips program files from the Sage Timeslips Server to a network workstation. This allows users to run the Sage Timeslips from their workstations while sharing a database on the Sage Timeslips Server.

How to locally install Sage Timeslips on your network workstation

- 1 Map the new workstation to the appropriate folder on the Sage Timeslips Server.
- 2 At the network workstation, start Windows. If any other applications are open, close them now.
- 3 From the Windows taskbar, select **Start; Run** and click **Browse**. Select **Setup.exe** within the **Loclinst** folder (**Timeslips\Loclinst** on the Sage Timeslips Server, by default). Click **OK**. The *Welcome to the Sage Timeslips Local Installer* view opens.

Click **Next** to continue. The *Select Installation or Update* view opens.

- 4 Select the type of local installation to run on the current workstation.
 - **Install:** Click this button if you are installing Sage Timeslips on this workstation for the first time. The *Select Installation Type* view opens (see step 5).
 - **Update:** If Sage Timeslips is already installed on this workstation, click this button to verify that the latest Sage Timeslips program files are installed. The *Ready to Install Sage Timeslips* view opens (see step 7).
- 5 Select the type of installation that you want the Setup program to perform. We recommend that you perform a **Complete** installation. Performing a **Custom** installation may omit some components.

Click **Next** to continue. The *Select the Destination Folder* view opens.
- 6 Select the local folder where you want to install your Sage Timeslips program files. By default, the Setup program installs Sage Timeslips in the **C:\Program Files\Timeslips** folder.

If necessary, click **Browse** to select a different location. After selecting the appropriate drive and folder, click **Next** to continue the installation procedure. The *Ready to Install Sage Timeslips* view opens.
- 7 The Setup program is ready to install Sage Timeslips on your workstation. If you want to change any of the Setup programs settings, click **Back**. If you want to begin installing the Sage Timeslips program files, click **Next**.

After copying the necessary program files to your computer, the *Select Program Folder* view opens.
- 8 Select the program folder where you want the Setup program to create your Sage Timeslips shortcuts. After selecting the appropriate program folder, click **Next** to continue.
- 9 Sage Timeslips completes the installation procedure. Choose additional options (creating desktop shortcut, installing Adobe Reader, reviewing the readme document, or checking for program updates) and click **Finish**.

Converting Sage Timeslips data

After upgrading your Sage Timeslips installation, you must convert your Sage Timeslips database for use with Sage Timeslips 2015.

The procedure for converting your data depends upon the version of Timeslips that you are upgrading. See Chapter 2, “Converting Sage Timeslips Data” for additional information about converting your current Timeslips database.

Registering Sage Timeslips

When you run Sage Timeslips, you may be presented with a screen containing instructions for registering your software. If Sage Timeslips prompts you to register, follow the onscreen instructions to register. If you choose not to register at that time, you will be allowed to use Sage Timeslips for 30 days, before you must register the program.

After 30 days from your first use of Sage Timeslips, if you have not yet registered the program, you will be required to register the program. You will not be able to use Sage Timeslips until you register the program.

Getting the Latest Release

We may occasionally issue a Service Release (SR) for Sage Timeslips. We recommend that you periodically check to ensure you are using the most up-to-date release.

Within Sage Timeslips, select **Help; Timeslips on the Web; Download Latest Update**.

Converting Sage Timeslips Data

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• Converting Your Data

Overview

After completing the upgrade process, as described in “Upgrading Sage Timeslips” on page 8, you must convert your database before you can use it with Sage Timeslips 2015.

Because converting Sage Timeslips data can involve some important decisions, we suggest that only the system administrator convert Sage Timeslips databases.



The conversion process may take an extended period of time. If your database is very large, the conversion process can be over an hour. Please consider this when choosing a time to convert your database.

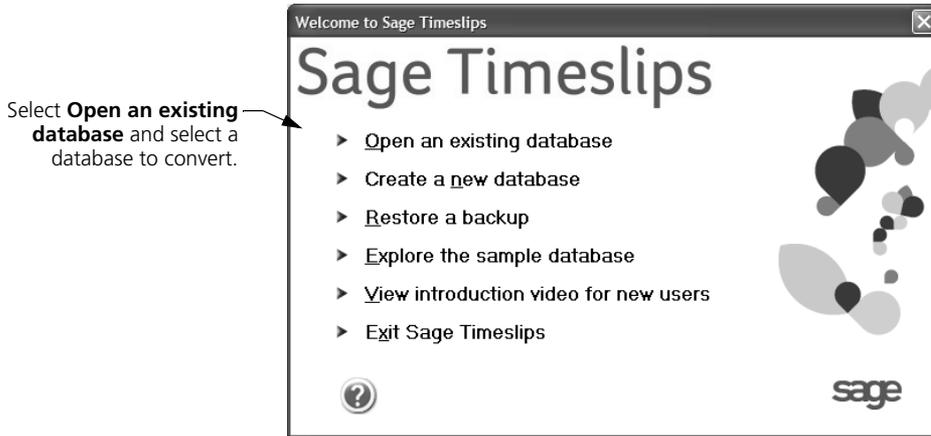
Converting data located on file servers

If your firm stores the Sage Timeslips database on a file server that is separate from all workstations, we recommend that you copy your database to a local folder before converting it:

- 1 verify that no one is accessing Sage Timeslips
- 2 copy the Sage Timeslips database folder from the file server to a local drive
- 3 open the local copy of your Sage Timeslips database to begin the conversion process
- 4 after completing the conversion process, copy the database folder from the local drive back to the file server

Converting from Sage Timeslips v9 and Later

After upgrading your Sage Timeslips installation, Sage Timeslips will convert your current database. If Sage Timeslips cannot locate your database, the *Welcome to Sage Timeslips* dialog box opens.



When you open a database created with Timeslips v9 through Timeslips 2013, Sage Timeslips will automatically convert the database for use with Sage Timeslips 2015.

You must back up your Timeslips database before you can convert it. After converting the database to Sage Timeslips 2015 format, you cannot open it with previous versions of Timeslips.

Migrating MSSQL and MSDE databases

Sage Timeslips no longer supports the use of MSSQL or MSDE databases. If you attempt to open an MSSQL or MSDE database, Sage Timeslips will prompt you to migrate that database to Paradox format.

How to migrate an MSSQL or MSDE database

Before migrating a database for use with Sage Timeslips 2015, we suggest that you have your database administrator create a backup of the database.

- 1 After upgrading your installation to Sage Timeslips 2015, open any MSSQL or MSDE database created with Sage Timeslips.
- 2 Sage Timeslips displays a message indicating MSSQL and MSDE are no longer supported. Click **Continue** to continue the migration process.

2 *Converting Sage Timeslips Data* *Sage Timeslips Upgrader's Guide*

- 3 When Sage Timeslips migrates data, it creates a new database in the appropriate format. Sage Timeslips must create this database in an empty folder.

Enter the new location of your Sage Timeslips database and click **Save**. For example, if you use Sage Timeslips in a multiple-station, network environment, you should save the new database in a folder that all Sage Timeslips users can access.
- 4 The Sage Timeslips Migration Utility begins migrating data. When the utility indicates that the migration process is complete, click **OK**.
- 5 After migrating your data, Sage Timeslips will prompt you to convert your database. Click **Yes** to convert the database.
- 6 Sage Timeslips prompts you to make a backup of the database before converting it. We strongly suggest that you create a backup at this time. Sage Timeslips 2015 will not be able to restore backups created from databases in MSDE or MSSQL format. Click **Yes** to create the backup file, select a location for the backup file, and click **Save**.
- 7 Sage Timeslips completes the conversion process. Click **OK**. Sage Timeslips will open the new database.

Converting client email addresses

Sage Timeslips uses email addresses when sending bills by email, reprinting bills to email, sending statements by email, and creating Outlook records.



Help

For more information on these features, view the following index keywords in the Sage Timeslips online Help system: “**sending bills to clients by email**,” “**reprinting bills:to email**,” “**sending statements to clients by email**,” and “**overview of the Outlook link**.”

Because some previous versions of Timeslips did not provide a field to store client email addresses, you may have used one of the phone number fields on the *General* page of the *Client Information* dialog box to store this information.

When converting databases, Sage Timeslips reviews the phone number fields to determine if one has been renamed to include the terms “e-mail” or “email.” If Sage Timeslips finds an appropriately renamed field, it will then review the contents of the field for each client. When it finds valid email addresses in the renamed field, it will copy the contents to the new *Email Address* field.

Converting bill and statement format settings

When you upgrade from Sage Timeslips v9 through Sage Timeslips 2004, the conversion process converts bill format templates into bill layouts and automatically assigns them to clients.

For example, if you use two different sets of bill format settings for your clients in Sage Timeslips v11, the conversion process creates bill layouts based on these settings and the settings in the bill layout template file. This process names the new bill layouts **Layout0001** and **Layout0002**. It automatically assigns the appropriate bill layout to each client. You can change the name and details of bill layouts at any time.

Sage Timeslips also creates and assigns statement layouts based on your statement configurations. Sage Timeslips names these templates **Layout01**, **Layout02**, etc.



Help

For more information on bill and statement layouts, view the following index keywords in the Sage Timeslips online Help system: “**designing layouts:bill layouts**” and “**designing layouts:statement layouts**”

Converting from Sage Timeslips v8 or Earlier

If you are upgrading from Timeslips v8 or an earlier version, we recommend that you contact our customer support department for information on converting your database.

Converting data from Timeslips v8 or an earlier version is a two-part process.

- The first part makes a copy of your Timeslips data (please note that your original Timeslips data will not be affected.) This step converts your data from 16-bit format to 32-bit format and places it in a new folder (such as Data01 or Data02).

During this part of conversion, Sage Timeslips will ask a series of questions that will determine how to store data types that have changed in the newer version.

- The second part of the conversion process will convert your Sage Timeslips for use with the latest version of Sage Timeslips.

Sage Timeslips 2015

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• Sage Timeslips 2015 •

New Features in Sage Timeslips 2015

This chapter details the new features added in Sage Timeslips 2015.



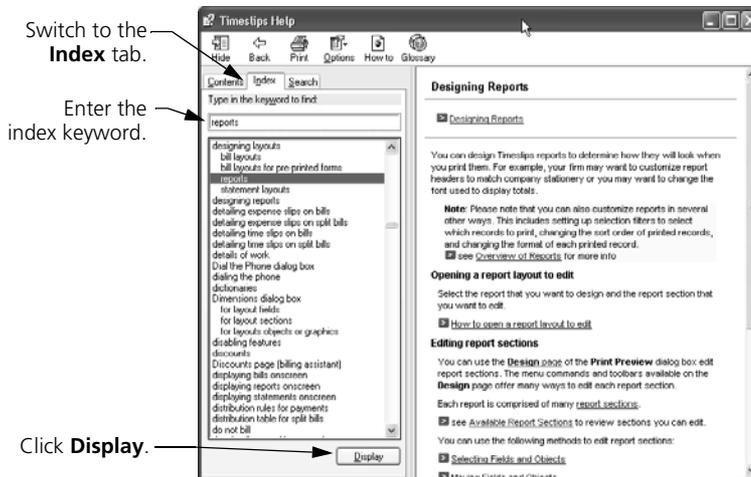
For a comprehensive list of all changes to Sage Timeslips, select **Help; What's New**. This topic discusses new features and changes for each past version.

How to find more information about each feature

Throughout this guide, we provide index keywords that direct you to comprehensive information available within the online Help.

To find the additional Help information:

- 1 Within Sage Timeslips 2015, select **Help; Online User's Guide**.
- 2 Switch to the **Index** tab of the *Sage Timeslips Help* dialog box.
- 3 Enter the index keyword. For example, to find more information about designing reports, look up **designing layouts** and choose **reports**.



- 4 Click **Display** to display the Help topic.

Working with Settings

The following enhancements have been added to settings.

Additional Firm Information fields

In the *General Settings* dialog box (select **Setup; General**), you can use the *Firm* pages to track information about your firm.



For more information on firm fields, look up “firm information” in the Timeslips Help index.

The screenshot shows the 'General Settings' dialog box with the 'Firm' section selected. The 'Address Information' sub-section is active, indicated by a circled '1'. The main area displays the 'Firm: Address Information' form with the following fields:

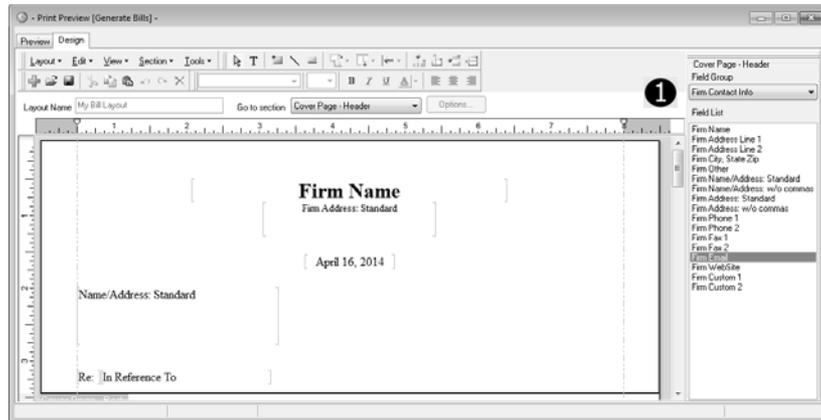
- Name:** Willis & Henderson, P. C.
- Address:** 133 S. Main Street, Suite 1402
- City, State:** Essex, MA
- ZIP Code:** 01929
- Other:** (empty field)
- Phone Numbers:** Phone 1: (978) 555-2222, Phone 2: (978) 555-5435
- Fax Numbers:** Fax 1: (978) 555-2121, Fax 2: (978) 555-3579
- Other:**
 - Email address:** wh-pc@example.com
 - Website:** www.sagetimeslips.com
 - Custom 1:** (empty field)
 - Custom 2:** (empty field)

A circled '2' points to the 'Other' section, highlighting the new fields for email address, website, and custom information. At the bottom right, there are 'OK', 'Cancel', and 'Help' buttons.

- 1 The *Firm: Address Information* page holds contact information for your firm.
- 2 New fields allow you to store the firm’s email address, web site URL, and additional custom information.

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You can include this information on bills and reports by editing the bill layout or report layout.



- 1 These new firm information fields are located in the *Firm Contact Info* field group. You can drag them onto the layout.

Working with Clients

The following enhancements have been added to clients.

Redesigned Client Information

The *Client Information* dialog box has been redesigned so that related fields and options are grouped better, navigation controls are more consistent throughout Sage Timeslips, and saving and retrieving of some information is faster.



For more information on client fields, look up “client information” in the Timeslips Help index.

Select **Names; Client Info** and then open a client to view Client Information.

Click on a page name from the list on the left to move to another page of Client Information.

This dialog box now contains the following pages:

- **Contact Info** – Includes full client name and address, four telephone numbers, and email addresses, as they would appear on the bill for the client.
- **In Reference To** – Use this area to describe the client, case, or project.
- **Rates** – Contains the client rates and rate selection rules.

- **Custom Fields** – Contains custom data fields that you created for clients.
- **Arrangements** – Contains the client's billing arrangements and adjustments for time charges, expense charges, or the full bill.
- **Holds** – Contains the client's hold options, which can hold time charges, expense charges, the entire bill, or transactions.
- **Charges** – Contains the client's tax, rounding, markup, interest, finance charge, and discount settings.
- **Invoices** – Contains the client's settings for invoice numbers, payment distribution, and email settings for bills.
- **Layouts** – Contains options that determine the layouts to use for bills and statements, client-specific messages to include on bills, and email templates to use when you send bills by email.
- **Balance** – Displays the client's aged balances.
- **Funds Accounts** – Contains the client funds account information.
- **Notes** – Contains free-form text about the client.
- **Activities** – Allows you to set up custom lists of tasks and expenses for each client.

Additional Fields for Secondary Address

On the *Client Information* dialog box (select **Names; Client Info** and open a client), the *Contact Info* page now contains additional fields for a second address.



For more information on client address fields, look up “**contact info**” in the Timeslips Help index.

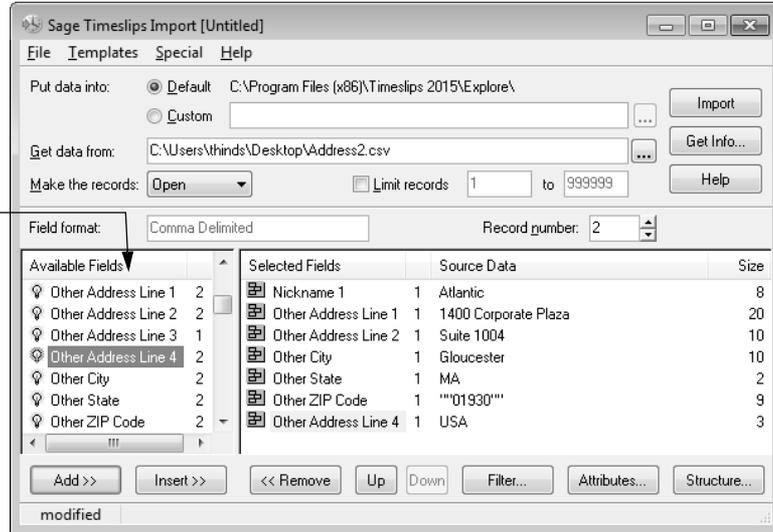
- 1 Choose **Contact Info** from the list of pages on the left.
- 2 The *Other* fields allow you to enter an additional address for each client.
- 3 If needed, you can change the “Other” label to your own custom label. Select **Setup; General** and then switch to the *Terminology* page.
- 4 For any client, click **Swap Addresses** to swap the *Primary* address with the *Other* address.

You can manually enter new addresses for each client or you can use TSIImport to import addresses.



For more information on importing data with TSIImport, see the TSIImport Help system.

You can import
Other addresses
for existing clients.



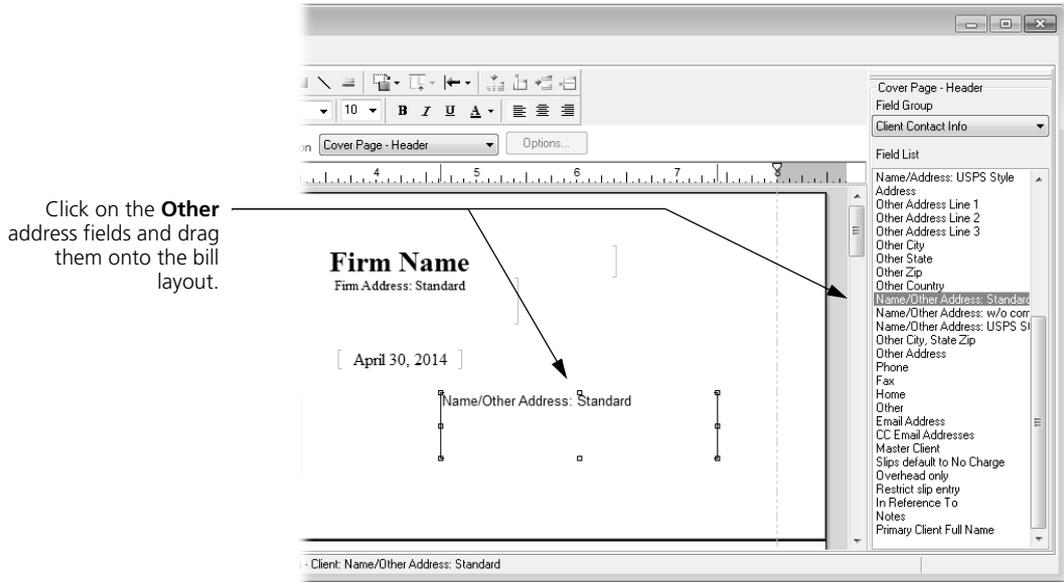
After additional addresses are entered for clients, they can display on bills, labels, and other reports.

For example, you can show the addresses when printing the Name/Address listing.

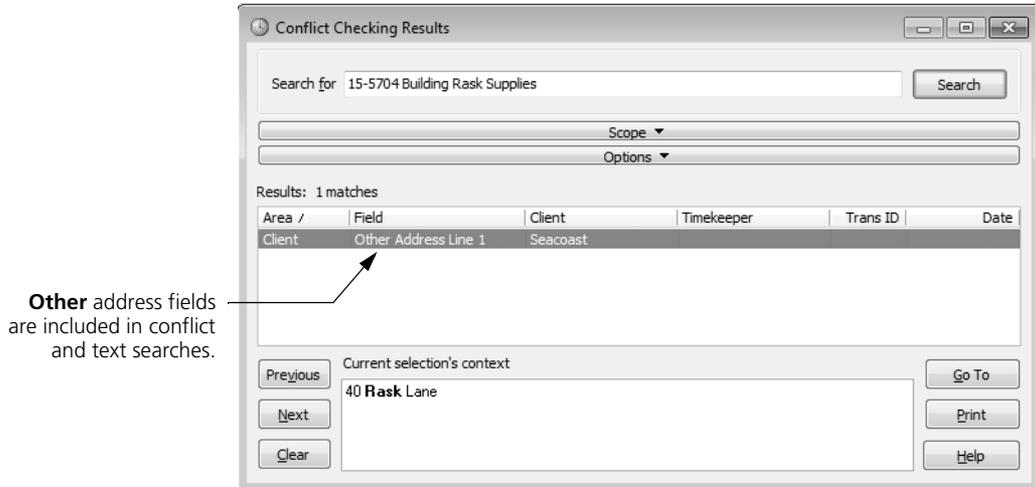
Mark **Show Other Address** to include the new address fields on the report.



Or, when you are designing bill layouts, you can drag the new address fields onto the bill header.



When searching for conflicts of interest or other text, Sage Timeslips will now also search the *Other* address fields.



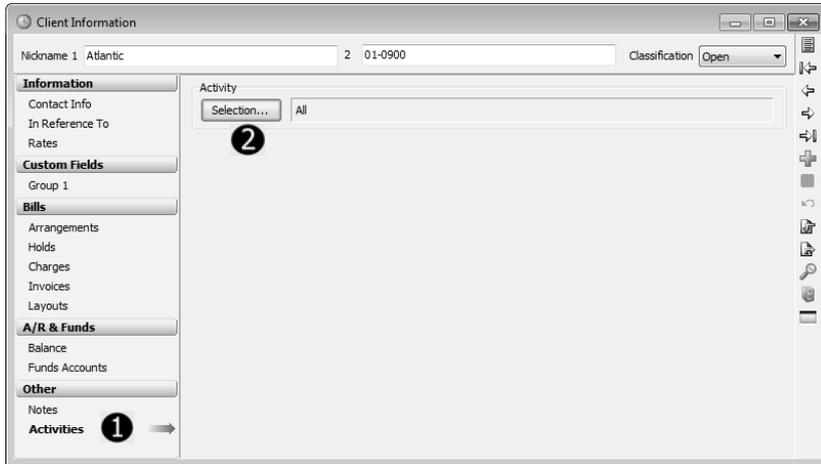
Setting Up Custom Lists of Activities for Clients

You can now set up custom lists of tasks and expenses for each client. This can make entering slips easier, because after you choose the *Client*, only the tasks or expenses associated with that client will be available on the slip.



Help

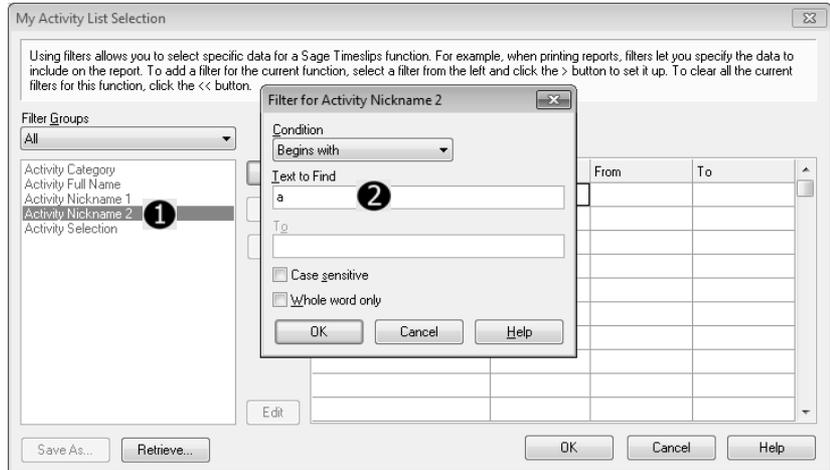
For more information on custom lists of activities, look up “my lists” in the Timeslips Help index.



- 1 You can use the *Activities* page of the *Client Information* dialog box to set up these custom lists of activities for each client.
- 2 This process uses familiar *Selection* dialog boxes, allowing you to set up one or more filters that can limit the names displayed.

For example, client Atlantic will be working with only those activities that have a nickname 2 beginning with A. To be able to limit activity lists to those names, you can set up custom list of activities for client Atlantic.

Click the **Selection** button to set up selection filters.



- 1 From the *Filters* list, you can add a *Activity Nickname 2* filter.
- 2 The *Filter for Activity Nickname 2* dialog box opens. You can then set up the filter to display only names beginning with "a" .

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After the custom list of activities is set up, you can see the results when entering slips.

The screenshot shows a form with the following fields and values:

Timekeeper		
Task		
Client	Atlantic	01-0900
Reference	<None>	
Extra		

The screenshot shows the task list with the following entries:

Timekeeper		
Task		
Client	Appear for/attend	A109
Reference	Communicate (in firm)	A105
Extra	Communicate (other counsel)	A107
	Communicate (other external)	A108
	Draft/revise	A103
	Manage data/files	A110
	Other	A111
	Plan and prepare for	A101
	Research	A102
	Review/analyze	A104

- 1 After selecting client Atlantic...
- 2 Only tasks with a nickname 2 beginning with "a" will show on the task list.

Changing Classifications

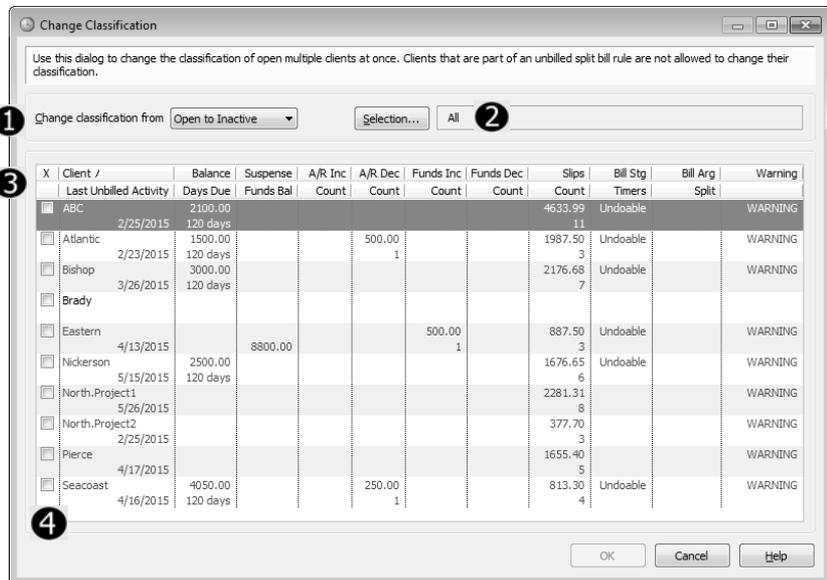
When changing classifications for clients (for example, when making a client *inactive* or when *closing* a client), Sage Timeslips now offers more information about those clients.



For more information on classifications, look up “name classifications” in the Timeslips Help index.

Changing classifications from the Client List

From the Client List, click **Change Classifications** to change classifications for one or more clients. The *Change Classifications* dialog box opens, listing all clients.



- 1 Choose how you want to change classifications. For example, you can change selected *Open* clients to *Inactive*.
- 2 Optionally use selection filters to limit which clients are displayed.
- 3 Several columns of data are displayed for each client, indicating different reasons why you may not want to change the client at this time. You can click on the column headings to sort this list.
- 4 Mark the clients that you want to change and click **OK**.

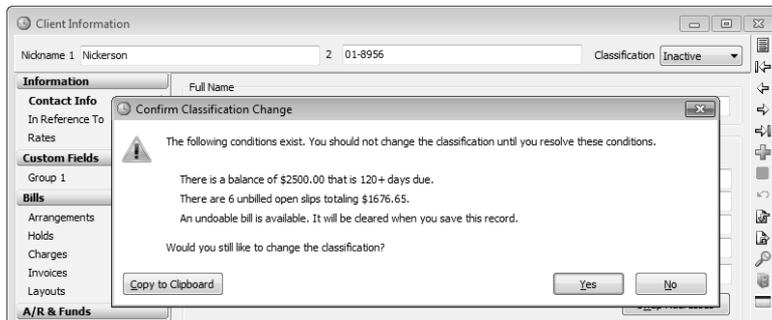
Changing classifications from Client Information

Using the *Classification* field within *Client Information*, you can change the classification for a specific client.

You can change classifications from Client Information



Before saving a new classification, Sage Timeslips will display reasons why you may not want to change the classification.



Click No if you want to address any of those issues, and you can change classifications later.

Working with Transactions

The following enhancements have been added to accounts receivable and funds transactions.

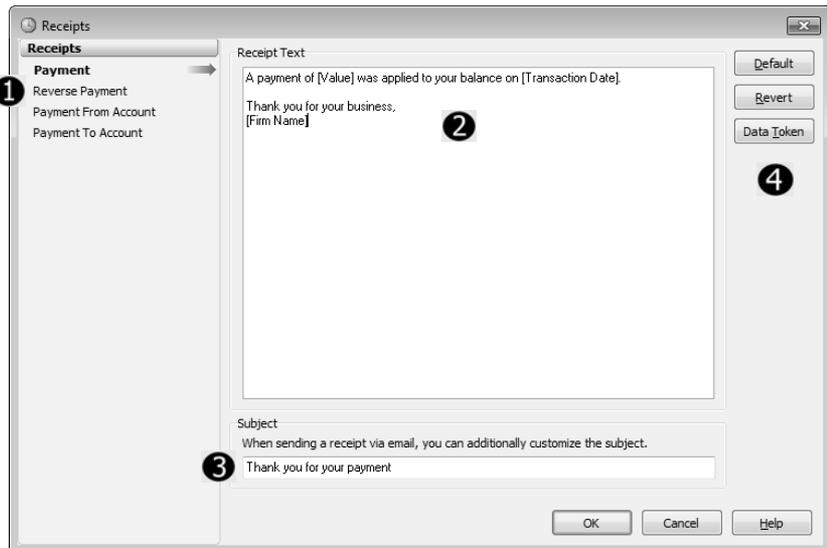
Generating Receipts for Payments

You can confirm that you received a payment from a customer by generating a payment receipt. Receipts are available for payments, reverse payments, payments to account, and payments from account.



For more information on payment receipts, look up “receipts” in the Timeslips Help index.

Sage Timeslips provides a set of messages that are used in receipts, but you can customize these to fit your business. Select **Setup; Receipt Templates** to open the *Payment Receipts* dialog box where you can customize receipt text.

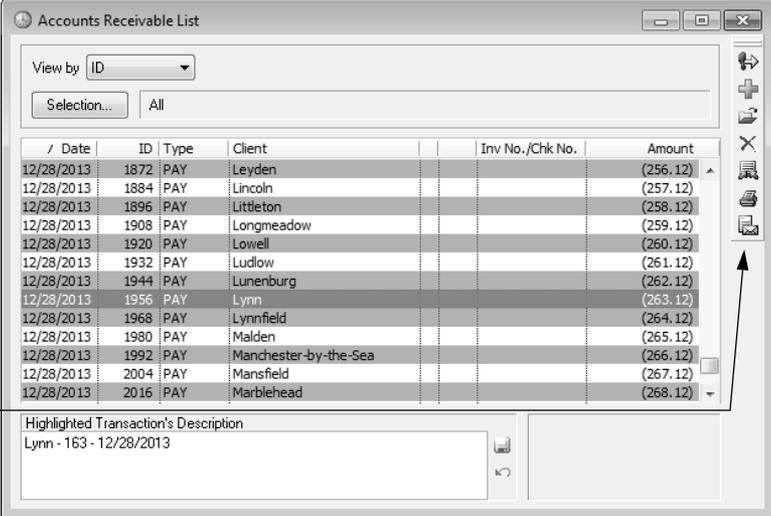


- 1 Choose a transaction type from the list to the left. You can set up receipts for payments, reverse payments, payments to account, and payments from account.
- 2 Receipt text will appear on printed receipts and receipts sent by email.
- 3 Subjects are used only for receipts sent by email.
- 4 When editing receipt text and subjects, you can optionally insert data tokens in the text. These tokens will be translated when the receipt is generated.

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When you want to generate a receipt for a payment, open the *Accounts Receivable List* dialog box, select a transaction, and click **Receipt** .

Click **Receipt** from the toolbar to generate a receipt for the selected transaction.



Date	ID	Type	Client	Inv No./Chk No.	Amount
12/28/2013	1872	PAY	Leyden		(256.12)
12/28/2013	1884	PAY	Lincoln		(257.12)
12/28/2013	1896	PAY	Littleton		(258.12)
12/28/2013	1908	PAY	Longmeadow		(259.12)
12/28/2013	1920	PAY	Lowell		(260.12)
12/28/2013	1932	PAY	Ludlow		(261.12)
12/28/2013	1944	PAY	Lunenburg		(262.12)
12/28/2013	1956	PAY	Lynn		(263.12)
12/28/2013	1968	PAY	Lynnfield		(264.12)
12/28/2013	1980	PAY	Malden		(265.12)
12/28/2013	1992	PAY	Manchester-by-the-Sea		(266.12)
12/28/2013	2004	PAY	Mansfield		(267.12)
12/28/2013	2016	PAY	Marblehead		(268.12)



Receipt for Payment #1956

A payment of 263.12 was applied to your balance on 12/28/2013.

Thank you for your business,
Timeslips Handyman Services

1 Print 2 Email Cancel

When viewing the receipt you can 1) print out a copy of it, or 2) send a copy to the client by email.

Sage Timeslips will track when a receipt is printed or emailed.

You can view this information for your payments using the Accounts Receivable Receipt Listing.

4/7/2014 5:10 PM		Timeslips Handyman Services Accounts Receivable Receipt Listing				Page 1	
Selection Criteria							
A/R Classification Clie. Selection		Open Include: Lynn					
ID	Date	Type	Client	Value	Sent Date	Sent Time	
1945	1/28/2013	PAY	Lynn	(\$263.01)			
1946	2/28/2013	PAY	Lynn	(\$263.02)			
1947	3/28/2013	PAY	Lynn	(\$263.03)			
1948	4/28/2013	PAY	Lynn	(\$263.04)			
1949	5/28/2013	PAY	Lynn	(\$263.05)			
1950	6/28/2013	PAY	Lynn	(\$263.06)			
1951	7/28/2013	PAY	Lynn	(\$263.07)			
1952	8/28/2013	PAY	Lynn	(\$263.08)	4/7/2014	5:03 PM	
1953	9/28/2013	PAY	Lynn	(\$263.09)			
1954	10/28/2013	PAY	Lynn	(\$263.10)			
1955	11/28/2013	PAY	Lynn	(\$263.11)			
1956	12/28/2013	PAY	Lynn	(\$263.12)	4/7/2014	5:02 PM	

This report appears on the *A/R Transactions* page of the *Report List*. If this report does not exist in your installation, do the following:

- 1 Select **Reports; Create a Report**.
- 2 Choose **Create a completely new user-defined report** and then click **Next**.
- 3 Set **Data** to **A/R Transactions**; set **Style** to **Detail Listing**, and then click **Next**.
- 4 Choose **Accounts Receivable Receipt Listing** and then click **Next**.
- 5 Optionally change the name and location of the report and then click **Next**.
- 6 Click **Open Report Entry**.
- 7 Save the report and print it to Display.

Working with Bills

The following enhancements have been added to the billing cycle.

Printing Watermarks on Draft Bills

During your typical bill cycle, you may print preview drafts of your bills, before all charges are ready to send to your clients. When printing a draft bill run, you can include watermarks on the bills to indicate they are draft bills.

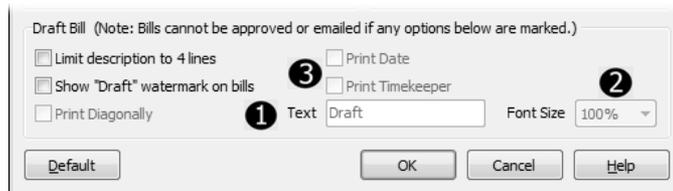


For more information on watermarks, look up “**draft bills**” in the Timeslips Help index.

To access the new bill options:

- 1 Select **Bills; Generate Bills** to open the **Report Entry** dialog box.
- 2 At the bottom of the dialog box, click the **Options** button.

There is a new *Draft Bill* group of options now available. Using these options, you can customize the watermark to use 1) custom text, 2) custom font, and 3) other information.

A screenshot of the 'Draft Bill' dialog box. The title bar reads 'Draft Bill (Note: Bills cannot be approved or emailed if any options below are marked.)'. The dialog contains several options: 'Limit description to 4 lines' (checkbox), 'Show "Draft" watermark on bills' (checkbox), 'Print Diagonally' (checkbox), 'Print Date' (checkbox), and 'Print Timekeeper' (checkbox). There are three numbered callouts: '1' points to the 'Text' field which contains 'Draft'; '2' points to the 'Font Size' dropdown menu which is set to '100%'; and '3' points to the 'Show "Draft" watermark on bills' checkbox. At the bottom, there are buttons for 'Default', 'OK', 'Cancel', and 'Help'.

Please note that draft bills cannot be approved. When you print draft bills, you will not be able to put them in Proof Stage, approve them, or email them.

To approve the bills, you will need to show full descriptions and exclude watermarks for the bill run.

Sending Electronic Bills for Review

With Sage Timeslips, you can save billing information to file for electronic submission to firms like LEDES, LegalGard, or TyMextrix.



Help

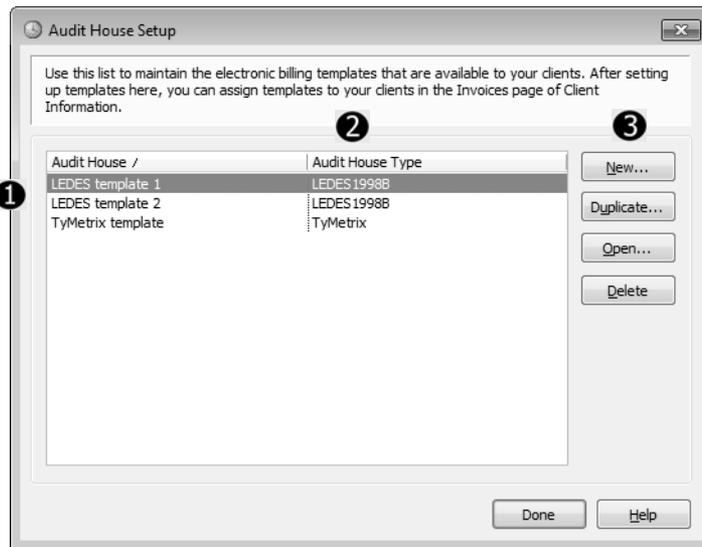
For more information on electronic bill review, look up “electronic billing” in the Timeslips Help index.

The following enhancements have been made to electronic billing:

Electronic billing templates

You can now set up electronic billing templates for each type of audit house. This allows more control over the format of the billing information that is exported.

Select **Setup; Audit Houses** to maintain your electronic billing templates.



When maintaining electronic billing templates:

- 1 The list shows all templates currently set up. The Audit House column indicates the name of the template.
- 2 The Audit House Type column indicates which third-party firm (like LEDES 1998B) the template is associated with.
- 3 Use the buttons on the right to create, edit, or delete templates.

When creating or editing an electronic billing template, use the *Setup* dialog box to set up the template.

The screenshot shows the 'LEDES1998B Setup' dialog box. It is divided into several sections: 'Name', 'Export File', 'Invoice', 'Line Items', and 'Firm'. Callout 1 points to the 'Export File' dropdown menu. Callout 2 points to the 'Client ID' dropdown menu. Callout 3 points to the 'Task Code' dropdown menu. Callout 4 points to the 'Move clients to Audit Stage after processing' checkbox.

1 Export File: Export all clients to one file (dropdown), LEDES1998B.DAT (text field)

2 Invoice:
Client ID: Client ID (dropdown) Start and End dates come from selected slips
Law Firm Matter ID: Firm Matter ID (dropdown) Start and End dates come from custom fields
Client Matter ID: Matter ID (dropdown) Billing Start Date: Billing Start (dropdown)
Invoice Description: In Reference To (dropdown) Billing End Date: Billing End (dropdown)

3 Line Items:
Task Code: Reference Nickname 1 (dropdown) Use UTBMS Codes: Litigation Code Set (dropdown)
Expense Code: Expense Nickname 1 (dropdown) Use UTBMS Codes
Activity Code: Task Nickname 1 (dropdown) Use UTBMS Codes
Timekeeper ID: Timekeeper ID (dropdown)
Timekeeper Name: Timekeeper Name (dropdown)
Timekeeper Classification: Classification (dropdown)

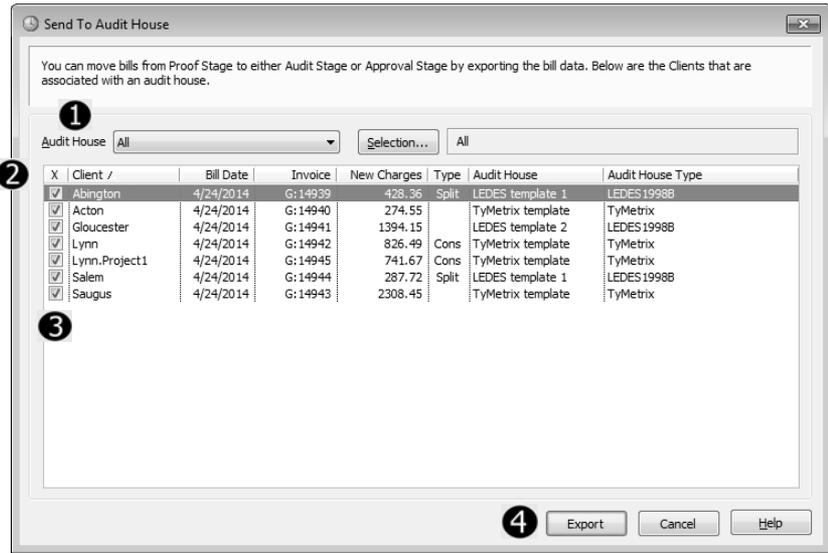
Firm:
Law Firm ID: (text field) Move clients to Audit Stage after processing **4**
 Disregard Split Billing Rules

Buttons: OK, Cancel, Help

For example, when setting up a template for TyMetrix, you can:

- 1 assign the electronic billing file,
- 2 map where invoice fields in the exported file get their values,
- 3 map where line item fields in the exported file get their values, and
- 4 choose additional billing options

After printing bills and putting them in Proof Stage, you can now use the new *Send To Audit House* dialog box (select **Bills; Send Bills to Audit Houses**) to list all bills ready for third-party review.



When working with bills that are ready to send for review:

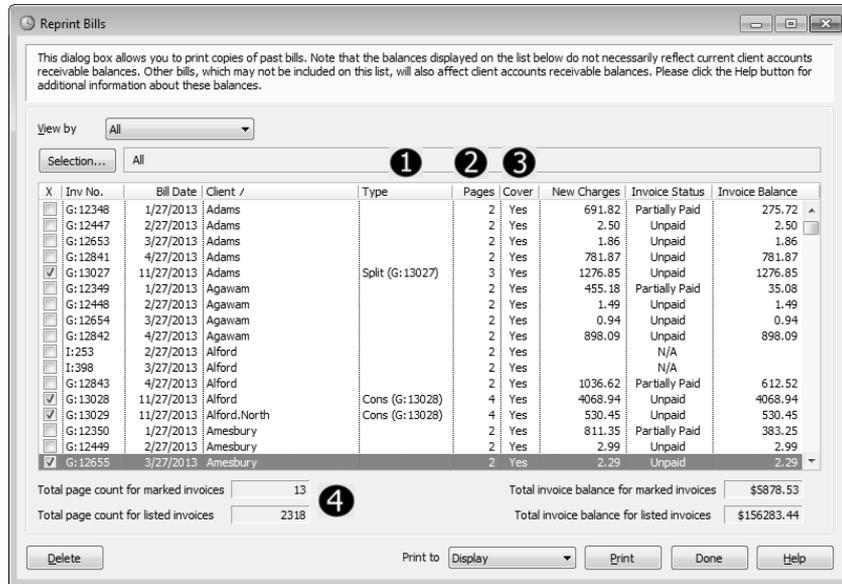
- 1 you can use the *Audit House* field and the *Selection* filters to limit which bills appear on the list
- 2 the list includes several columns of information to help you identify bills
- 3 mark the bills that you want to export; each bill will be exported to file using the settings in the associated template (from the Audit House column)
- 4 click **Export** to export billing information

Reprinting Bills

The *Reprint Bills* dialog box now contains additional fields about the bills that you can reprint. Select **Bills; Reprint Bills** to open the *Reprint Bills* dialog box.



For more information on reprinting bills, look up “reprinting bills” in the Timeslips Help index.



This dialog box now contains the following:

- 1 The *Type* column indicates if the bill was part of a split billing arrangement or a consolidated billing arrangement.
- 2 The *Pages* column shows the number of pages for the bill image.
- 3 The *Cover* column shows if the bill image includes a cover page.
- 4 You can see the total number of pages for selected bill images and for all bill images.

Working with TimeCapture

TimeCapture has been updated with several enhancements.



For more information on TimeCapture, please see the Help system for TimeCapture.

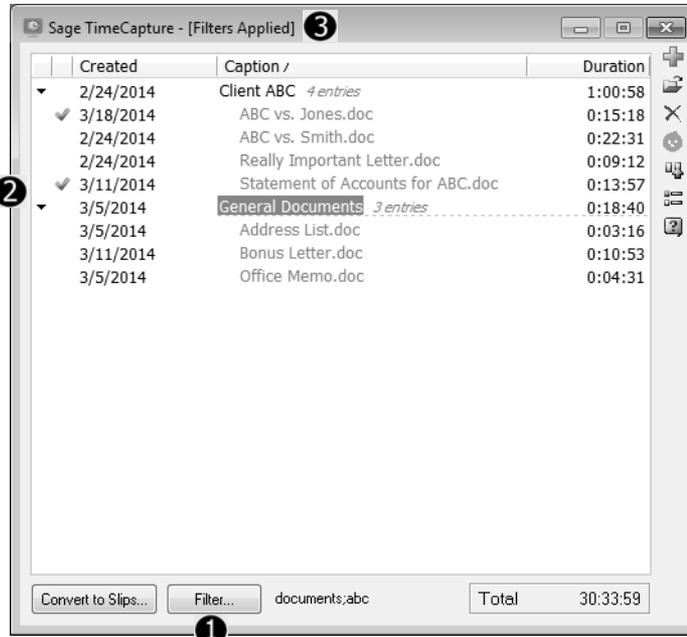
Starting TimeCapture

You can start TimeCapture using the TimeCapture shortcut in your Sage Timeslips program group.

You can now also open TimeCapture from within Sage Timeslips (select **Special; TimeCapture**).

Filtering the Time Entries List

When viewing the list of time entries, you can limit the list to show specific time entries using a text filter.



When using filters:

- 1** You can click the **Filter** button at the bottom of the Time Entries List, enter the filter, and click **OK**. The filter text will appear to the right of the **Filter** button.
- 2** TimeCapture will refresh the Time Entries List to show only those entries that include that text within the Caption, Group, or Windows title.
- 3** When a filter is applied to the list, the heading will change to include **[Filters Applied]**.



For more information on using filters, look up “**filtering the time entry list**” in the TimeCapture Help index.

Editing Time Entries

There are now more ways to edit multiple entries:

- You can move multiple entries to another group.

For example, suppose you want to move some entries from the Microsoft Word group to the My Entries group. Open the Microsoft Word group, click on an entry, and then hold **Ctrl** while clicking on additional entries. After selecting the entries to move, drag the entries and drop them onto the My Entries group.

- You can merge multiple entries to create a new entry.

For example, suppose you want to merge all entries within the Microsoft Word group into a new entry. You can right click on that group and choose **Merge Entries**.

TimeCapture will open a new entry adding all the time from the original entries. Any notes from those entries will be merged into the new entry. When you click **OK** to save the new entry, the original entries will be removed.

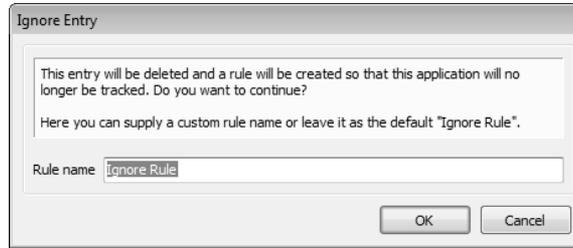


For more information on editing entries, look up “**editing time entries**” in the TimeCapture Help index.

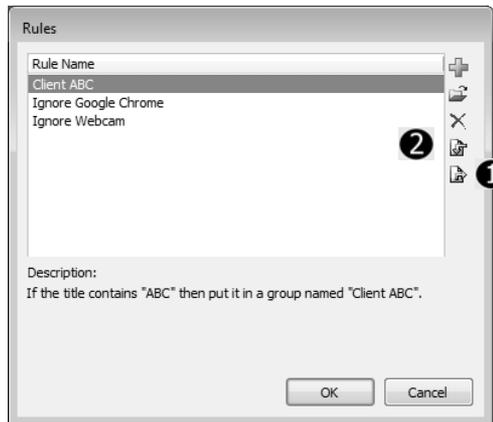
Using Rules

When creating an Ignore rule, you can now name the rule at creation time.

For example, if you want to ignore time spent in Google Chrome, you can right click on a Google Chrome entry and choose **Ignore > This Application**. TimeCapture will then prompt you to enter a name for the new rule.



If multiple workstations using TimeCapture will be using the same set of rules, you can now export rules for those other workstations.



From the Rules list you can:

- 1 You can click **Export**  to export all rules to file. Enter a file name, select a location, and click **Save** to save the rules file.
You can then send the file to other timekeepers, using a shared drive, a thumb drive, or email.
- 2 You can click **Import**  to import all rules from a file.



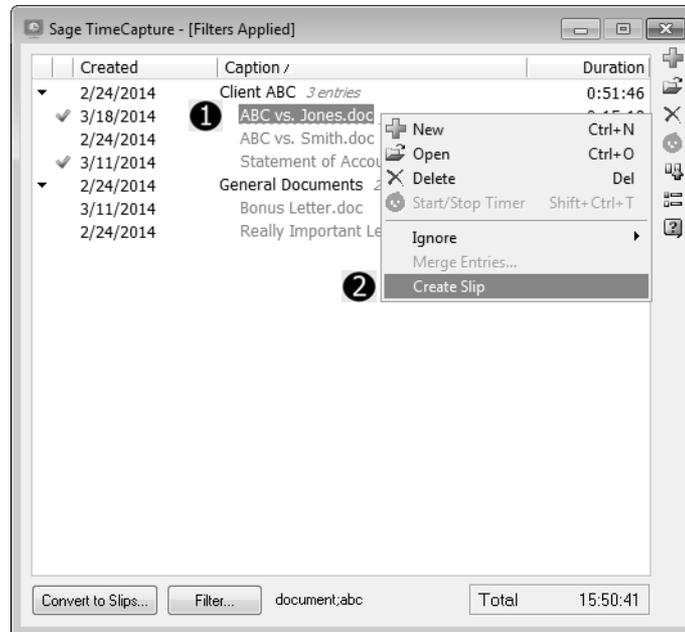
Help

For more information on maintaining rules, look up “**setting up rules**” in the TimeCapture Help index.

Converting TimeCapture Entries

In the previous version of TimeCapture, when you were ready to convert entries, you viewed all entries that were ready for conversion and then marked the entries you wanted to send.

Now, you choose any single entry that is ready for conversion.



To convert a single time entry:

- 1 Right click on the entry that you want to send to Sage Timeslips. The entry must have a green check mark next to it, indicating that you have assigned names to the entry and it is ready for conversion.
- 2 Choose **Create Slip**.
- 3 TimeCapture will verify that you want to convert the entry. Click **Yes** to send the entry to Sage Timeslips.



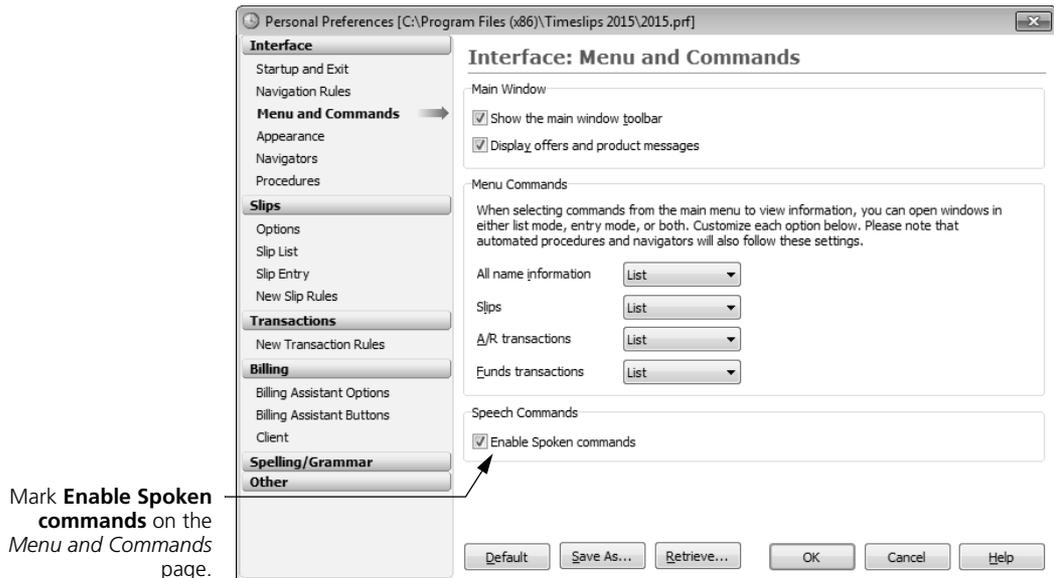
For more information on converting entries, look up “converting time entries into time slips” in the TimeCapture Help index.

Working with Speech Recognition

Sage Timeslips can now use Windows Speech Recognition to implement narration, navigation, and voice commands through a microphone.

Setting up preferences

To enable Windows Speech Recognition for use with Sage Timeslips, select **Setup; Preferences**, switch to the *Menu and Commands* page, and mark **Enable Spoken commands**.



Taking the Speech Recognition tutorial

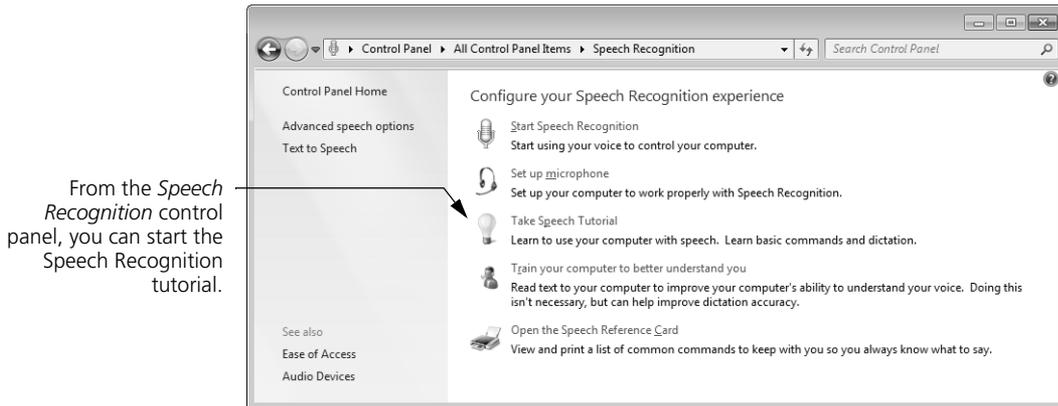
If you have not used Windows Speech Recognition yet on your workstation, marking **Enable Spoken commands** will start the Speech Recognition tutorial.

You must take this tutorial to use Windows Speech Recognition:

- it will help you set up speech settings on your workstation
- it will teach you the features and commands of the speech recognition system
- it will help the speech recognition system to identify how you speak

As you continue to use speech recognition, the system will continue to improve.

If the tutorial does not start automatically, you can access it through the Control Panel. For example, on Windows 7 you can select **Start; Control Panel** and then choose **Speech Recognition**.



Using speech commands

Sage Timeslips provides a set of commands that can help you create new entries and save them. These commands are: new slip, new time slip, new expense slip, new client, new task, new expense, save record, slip list.

For example, saying "new time slip" will start the process of creating a slip.

Navigating through the interface

As you create entries in Sage Timeslips, you can say equivalent commands for key presses to move through the interface. For example, you can say "tab" to press the Tab key, which will move you to the next field.

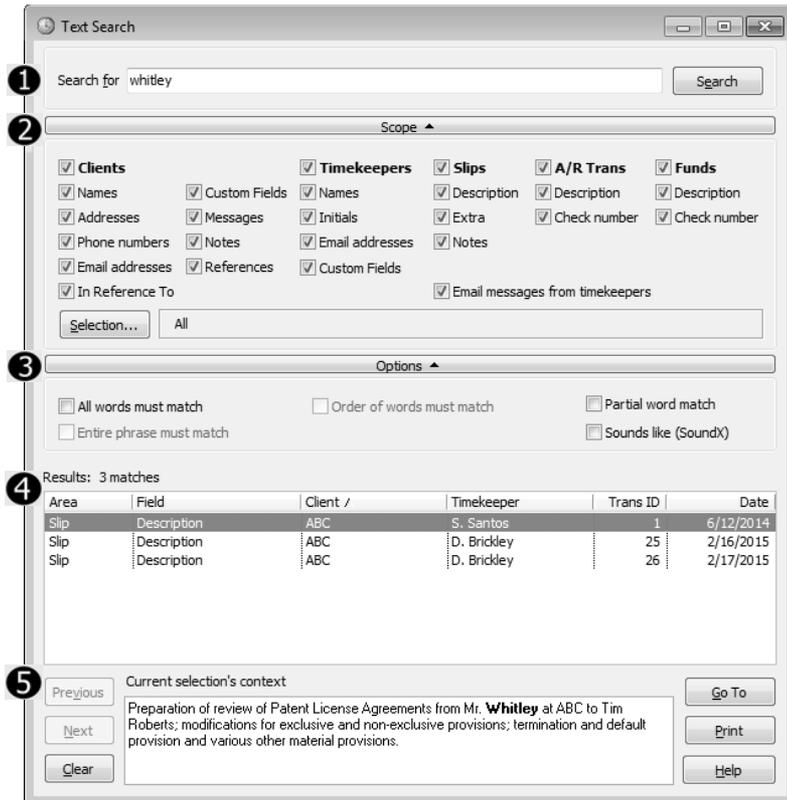
Narrating descriptions

As you enter slips and transactions, you can narrate description text. Windows Speech Recognition provides additional commands that may help you find and edit text. Please refer to the Help provided with Windows for these commands.

For example, in Windows 7, the Speech Recognition control panel provides a command to Open the Speech Reference Card.

Working with Text Search

The *Text Search* dialog box has been redesigned.



- 1 Enter the terms to find.
- 2 The search scope fields are now grouped, making it easier to choose the areas you want. Additional fields are now searchable, such as client email address, timekeeper email addresses, and transaction check numbers. You can click the **Scope** heading to hide this section.
- 3 You can choose additional search options or click the **Options** heading to hide this section.
- 4 Search results are now sortable. Click on any column heading to sort the list. Click on any result to see the context below.
- 5 Use the **Previous** and **Next** buttons if multiple matches are found on the same record. Click **Go To** to drill down to the current match. Click Print to print a listing of all matches.

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Sage Timeslips 2014

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• Sage Timeslips 2014 •

New Features in Sage Timeslips 2014

This chapter details the new features added in Sage Timeslips 2014.



Help

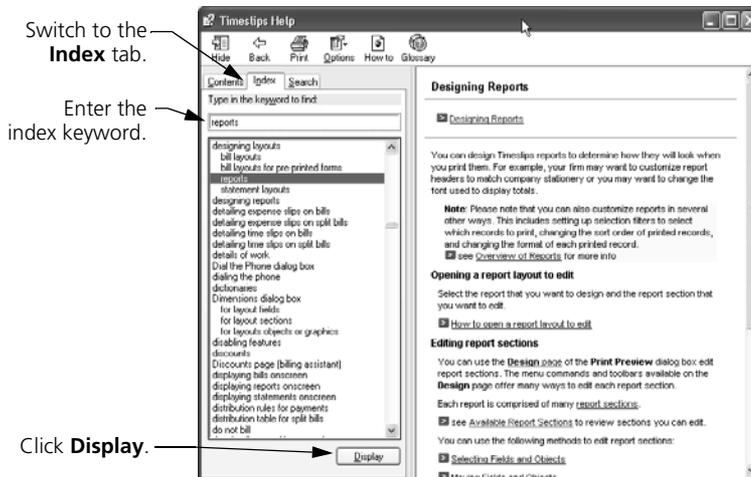
For a comprehensive list of all changes to Sage Timeslips, select **Help; What's New**. This topic discusses new features and changes for each past version.

How to find more information about each feature

Throughout this guide, we provide index keywords that direct you to comprehensive information available within the online Help.

To find the additional Help information:

- 1 Within Sage Timeslips 2014, select **Help; Online User's Guide**.
- 2 Switch to the **Index** tab of the *Sage Timeslips Help* dialog box.
- 3 Enter the index keyword. For example, to find more information about designing reports, look up **designing layouts** and choose **reports**.



- 4 Click **Display** to display the Help topic.

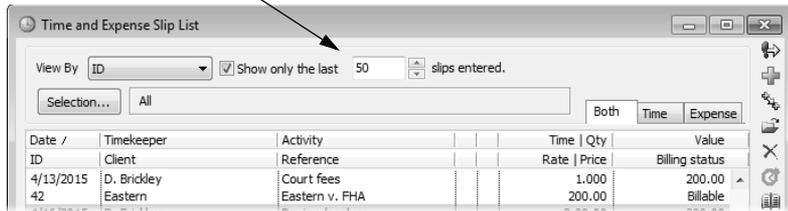
Working with Slips

The following enhancements affect Time and Expense Slip List (select **Slips**; **Time and Expense Slips**) and Slip Entry.

New Slip List Filter

The *Time and Expense Slip List* (select **Slips**; **Time and Expense Slips**) can now include a new filter at the top that allows you to show the last X slips entered.

Choose the number of slips to show on the *Time and Expense Slip List*



This can speed up performance in large databases by showing only new slips, like slips from the past few months.



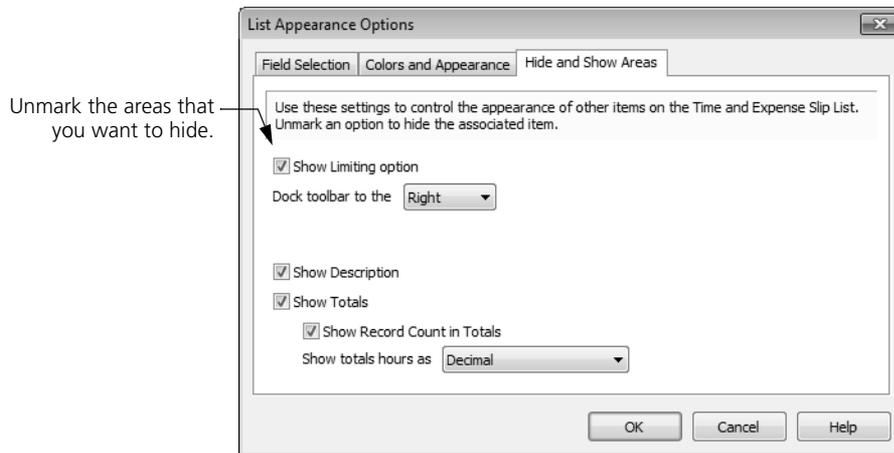
For more information on this filter, look up “slip list” in the Sage Timeslips Help index.

Show/Hide Slip List Fields

You can now control whether several areas on the *Time and Expense Slip List* are displayed or not.

This includes the new *Show only the last* filter at the top of the list; the *Description* preview and *Slip Totals* at the bottom of the list; and you can now show or hide the total number of slips displayed. You can also choose where the toolbar displays.

From the *Time and Expense Slip List*, click  and switch to the *Hide and Show Areas* page to access these new options.

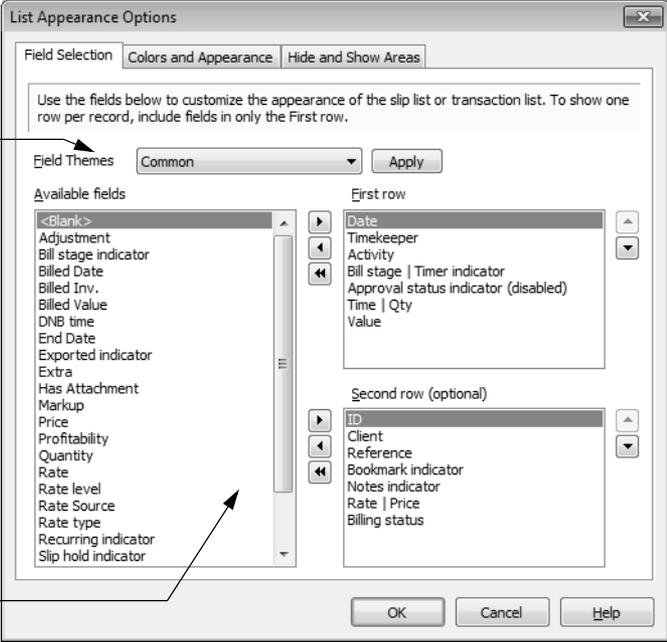


For more information on this hiding slip list fields, look up “slip list fields” in the Sage Timeslips Help index.

You can now change the fields displayed on the *Time and Expense Slip List* using Field Themes.

From the *Time and Expense Slip List*, click  and choose *Field Selection* to access themes.

Choose a theme from the list and click **Apply**.



You can add or remove fields on the slip list individually.

List Appearance Options

Field Selection | Colors and Appearance | Hide and Show Areas

Use the fields below to customize the appearance of the slip list or transaction list. To show one row per record, include fields in only the First row.

Field Themes: Common [Apply]

Available fields:

- <Blank>
- Adjustment
- Bill stage indicator
- Billed Date
- Billed Inv.
- Billed Value
- DNB time
- End Date
- Exported indicator
- Extra
- Has Attachment
- Markup
- Price
- Profitability
- Quantity
- Rate
- Rate level
- Rate Source
- Rate type
- Recurring indicator
- Slip hold indicator

First row:

- Date
- Timekeeper
- Activity
- Bill stage | Timer indicator
- Approval status indicator (disabled)
- Time | Qty
- Value

Second row (optional):

- ID
- Client
- Reference
- Bookmark indicator
- Notes indicator
- Rate | Price
- Billing status

[OK] [Cancel] [Help]

Choose a theme from the list and click **Apply**, or choose to show or hide specific slip fields to customize the list yourself.



Help

For more information on this hiding slip list fields, look up “slip list fields” in the Sage Timeslips Help index.

New Slip List Preferences

New preferences have been added that affect the Time and Expense Slip List:

From the *Time and Expense Slip List*, click  and choose the *Slips: Slip List* page to access these new options.

Slips: Slip List

When opening the slip list

- Select the first slip in the list
- Select the last slip in the list
- Remember the last selected slip
- Remember the selected tab

If security is set that does not allow you to view slips of other timekeepers then

- Show "Hidden due to security label" for each slip that you cannot see
- Hide any slips that you cannot view

Automatically update the slip list when generating bills or editing slips.

1

2

3

- 1 You can now control which slip tab and slip are selected when opening the list.
- 2 When using security to hide slips of other timekeepers, you can automatically hide those slips from the list.
- 3 When generating bills or editing slips using the time sheet, the list can update automatically with changes.



For more information on preferences, look up “**personal preferences dialog box**” in the Sage Timeslips Help index.

New Preference to Control Pasted Text

When pasting text from other applications (such as Microsoft Word), you can now control whether the text stays as rich text (with bolding, italics, etc.) or as plain text.

From the *Time and Expense Slip List*, click  and choose the *Slips: Options* page to access this new option.

Paste descriptions as plain text



For more information on preferences, look up “**personal preferences dialog box**” in the Sage Timeslips Help index.

New Preferences for Creating Slips

New preferences have been added that help slip creation:

From the *Time and Expense Slip List*, click  and choose the *Slips: New Slip Rules* page to access these new options.

Slips: New Slip Rules

1 Default Values

Create new slips for the logged in Timekeeper

2 Pull data from open dialogs when creating new slips

- 1** New slips can automatically select the logged in timekeeper.
- 2** New slips can pull in data from other open windows. For example, if the Client List is open and client ABC is highlighted, when you create a new slip, client ABC can automatically be selected.



For more information on preferences, look up “**personal preferences dialog box**” in the Sage Timeslips Help index.

Working with TAL Pro

The following enhancements affect the TAL Pro link for Sage 50 and QuickBooks. You can access TAL Pro features from the *Accounting* menu.

New Connection Settings

New settings help you maintain database connections in TAL Pro.

Select **Accounting; Set Up Accounting Link** and then switch to the *Connection Settings* page to access these options.

Connection: Settings

Database
Database

Style
Connecting on startup will leave the data connection open the entire time Sage Timeslips is open. Connect when needed will open and close the data connection as needed.

1 Connect at startup
 Connect when needed

Workstation
If you do not have your accounting package installed on this workstation, you can shut off the QuickBooks link for this workstation without affecting the database. This is the same setting that can be found within the Performance Settings dialog box.

2 Enable accounting link on this workstation

- 1 You can connect to your accounting package as needed
- 2 You can disable the TAL Pro link if some workstations do not have the accounting package installed.



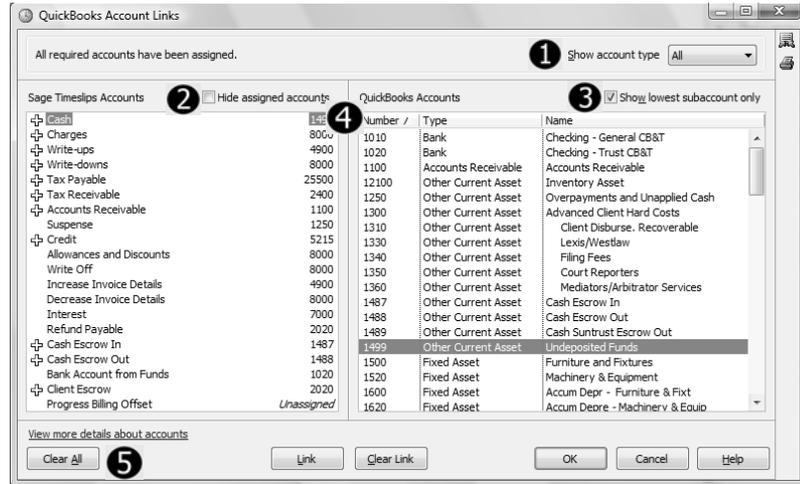
Help

For more information on setting up TAL Pro, look up “**setting up tal pro**” in the Sage Timeslips Help index.

You can also connect/disconnect manually at any time. There is a new link at the bottom of the Timeslips window that shows the current connection status that you can click to connect/disconnect and there is a new **Accounting; Connection Status** command.

Simplified Assignment of Accounts

TAL Pro offers improvements when you assign accounts to account categories. Select **Accounting > Link Accounts** to assign accounts.



- 1 You can set *Show account type* to **All** to see all available accounts. The type of each account is now included in the list.
- 2 You can mark *Hide assigned accounts* to filter the account categories to show only those that are not yet set up. The number of required accounts not yet set up is also listed at the top of the dialog box.
- 3 You can mark *Show lowest subaccount only* to filter the available accounts to show only the lowest subaccount (QuickBooks only).
- 4 You can now click column headings to sort the account list by account number, type, or name. This makes it easier to find the account you want.
- 5 A new **Clear All** button lets you clear all account links at once.



Help

For more information on assigning account numbers, look up “**assigning account numbers**” in the Sage Timeslips Help index.

New Account Categories

TAL Pro provides new account categories for more detailed transfers to your general ledger:

- The Cash Escrow account category is now split into Cash Escrow In and Cash Escrow Out.
- Credits can have sub account categories to split Fees and Costs.
- There is a new Refund Payable account category.
- There is a new Bank Account from Funds category for checks (QuickBooks only)

You can use these new account categories when setting up account links (select **Accounting; Link Accounts**).



For more information on how these accounts are used, look up “**how tal pro posts to your general ledger**” in the Sage Timeslips Help index.

New Options Enhance the Posting Process

New options have been added to the *Set Up Accounting Link* dialog box that improve the posting process.



For more information on any of the following options, look up “**setting up tal pro**” in the Sage Timeslips Help index.

The following options are located on the *Transfer: Method/Style* page. Select **Accounting; Set Up Accounting Link** and switch to the *Method/Style* page.

Transfer: Method/Style

Method

Specify the accounting method (cash or accrual) that Sage Timeslips will use to generate entries for QuickBooks. Your selection will need to match the method already selected in your General Ledger. If you are unsure which method to use, please consult your accountant.

Cash

Accrual

Style

1 Transfer invoices as Detail Summary

Transfer other transactions as Detail Summary

WIP

2 Transfer unbilled time slips as Work In Progress (WIP)

Transfer unbilled expense slips as Work In Progress (WIP)

Transfer WIP as Detail Summary

- 1 You can now transfer invoices and other transactions in Summary style, so only one entry for each account is posted.
- 2 You can now transfer time and expense work in process (WIP) entries to the general ledger.

The following options are located on the *Transfer: Options* page. Select **Accounting; Set Up Accounting Link** and switch to the *Transfer: Options* page.

Transfer: Options

Options

When suspense (such as overpayments) is transferred

3 Post using the original payment date
 Post using the date of the transfer

When a payment date is earlier than the invoice it is paying off

4 Post the payment using the date of the original payment
 Post the payment using the date of the invoice

Withdrawals, Refunds, and Transfer to Funds post as

1 General Journal Entries
 Checks

Payment From Account

2 Transfer Payments From Account as checks

Payee Sage Timeslips will look for a vendor in QuickBooks with this name. If it cannot be found, Sage Timeslips will attempt to add the name automatically.

Write separate checks for each PFA in a posting
 Write one check for all PFA in a posting

Billing

5 Prompt for transfer after generating bills.
 Prompt for transfer after undoing bills.

- 1 You can post Withdrawals, Refunds, and Transfer to Funds as checks or general journal entries. (QuickBooks only)
- 2 You can post Payments from Account as checks and also choose if each payment will be a separate check. (QuickBooks only)
- 3 When posting overpayments, you can now select the date used for posting the associated entries.
- 4 When posting payment that are earlier than the invoices they're paying, you can now select the date used for posting the associated entries.
- 5 When approving a bill or undoing a bill, TAL Pro can prompt you to post transactions.

When using the accrual method of accounting, you can override how taxes are posted. Select **Accounting; Set Up Accounting Link** and switch to the *Transfer: Options* page.

Taxes

Use Tax Rate Rule override settings for Accrual accounting

When overriding tax settings, two new options appear in the *Tax Rate Rules* dialog box. Select **Setup; Taxes**, switch to the *Tax Rate Rules* page and open a rule.

Transfer tax when billed instead of when paid with Accrual accounting (GST)

Do not transfer from Tax Receivables to Tax Payables with Accrual accounting



For more information on tax rate rules, look up “Tax Rate Rules dialog box” in the Sage Timeslips Help index.

The following options are located on the *Transfer: Entries* page. Select **Accounting; Set Up Accounting Link** and switch to the *Transfer: Entries* page.

- 1 You can customize the journal number prefixes for entries posted from bills and entries reversed from bills that were undone.
- 2 You can customize the customer, memo, and journal number for summary entries and WIP entries.

The following options are located on the *Transfer: Closed Periods* page. Select **Accounting; Set Up Accounting Link** and switch to the *Transfer: Closed Periods* page.

Transfer: Closed Periods

Settings

If there are closed periods in QuickBooks, you can assign the earliest date accepted by QuickBooks. You can also choose what to do with any entries that fall before the earliest date.

1 Earliest date acceptable to G/L 

When an entry falls before the minimum date accepted:

- 2** Allow the entry to show as an error
 Use the date of the posting (today)
 Use this date 

- 1** You can now set the earliest acceptable date for entries that you are posting.
- 2** You can also set date used if entries are earlier than the acceptable date.

Improved Posting Process

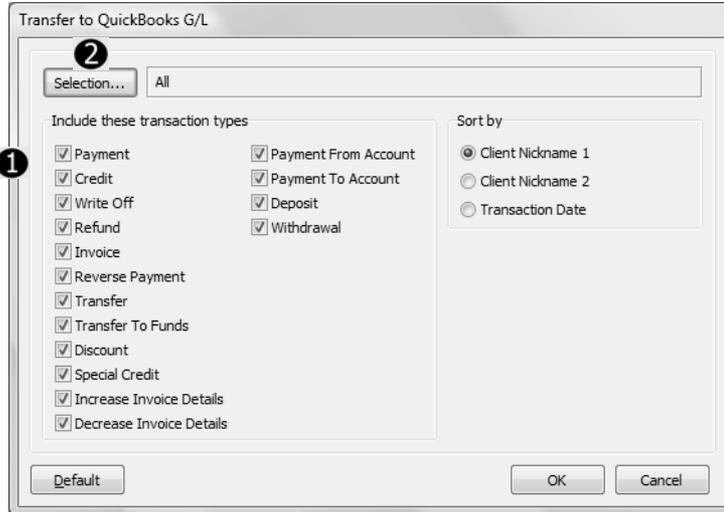
The process of posting journal entries to the general ledger includes several enhancements.



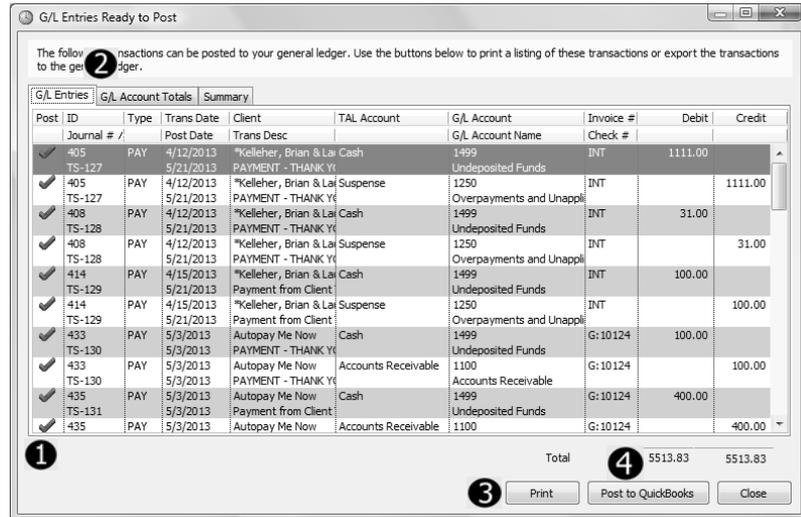
For more information on posting to the general ledger, look up “posting to the general ledger using TAL Pro” in the Sage Timeslips Help index.

You can now post entries at any time, not just after billing. Select **Accounting: Transfer to G/L** to begin the posting process.

- 1 On the *Transfer to G/L* dialog box, use the transaction type filters to choose the entries that will be posted by transaction type.
- 2 Use the **Selection** button to also filter entries by transaction date and client.



After clicking OK on the *Transfer to G/L* dialog box, the *G/L Entries Ready to Post* dialog box opens.



- 1 The *G/L Entries Ready to Post* dialog box allows you to see the entries that will post to your general ledger before posting them. This allows you to see and fix errors before transferring them.
- 2 The *G/L Entries Ready to Post* dialog box separates information into three tabs, so you can see: the detailed entries, totals of each account that will be updated, and a summary of the entries that will be posted.
- 3 You can print a listing of entries directly from the *G/L Entries Ready to Post* dialog box.
- 4 Click **Post** to post transactions to the general ledger.

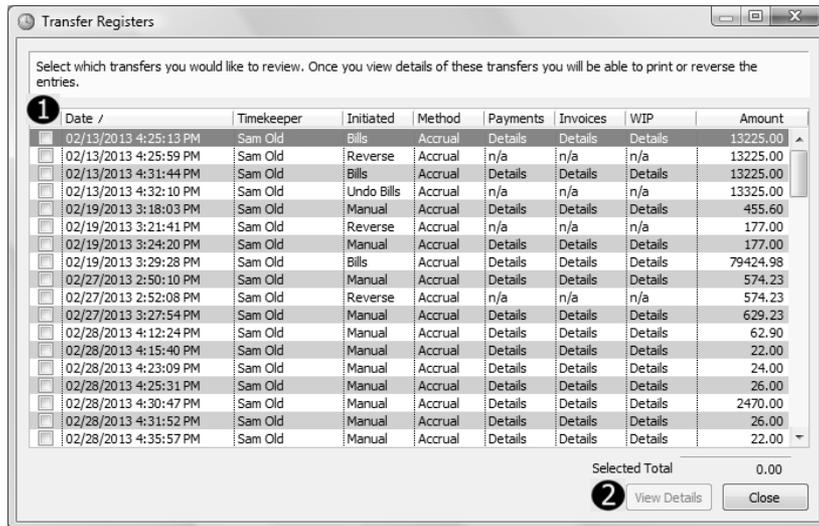
Reviewing Past Postings

TAL Pro now offers the ability to review past transfers. You can select **Accounting; View Past Transfers** to view them.

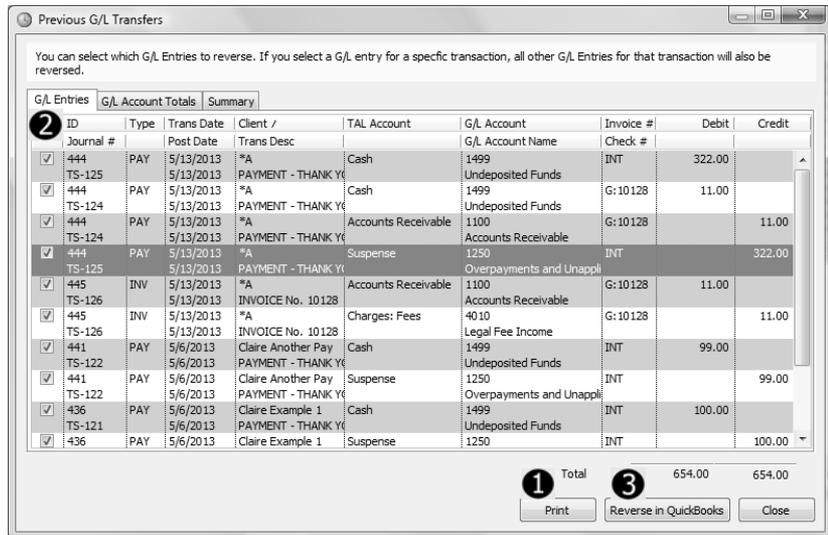


For more information on reviewing past postings, look up “posting to the general ledger using TAL Pro” in the Sage Timeslips Help index.

The *Transfer Registers* dialog box shows each posting to your general ledger.



- 1 You can choose one or more postings to review.
- 2 Click **View Details** to open the *Previous G/L Transfers* dialog box where you can review and print entries from those postings.



From the *Previous G/L Transfers* dialog box, you can:

- 1 print a listing of entries previously posted.
- 2 choose specific entries to reverse
- 3 click **Reverse** to post reversing entries to your general ledger

New Options to Help with Name Synchronization

New options have been added to the *Set Up Accounting Link* dialog box that make name synchronization easier to maintain.

Select **Accounting; Set Up Accounting Link** and then switch to the *Linked Names: Data* page to access these options.

Mark the types of names and the fields for each name to synchronize with your accounting package.

Linked Names: Data

Data to synchronize

- Sage Timeslips Clients with QuickBooks Customers
 - Address Lines 1-2, City, State, and Zip
 - Country to QuickBooks Country/Region
 - Phone to QuickBooks Phone
 - Fax to QuickBooks Fax
 - Home to QuickBooks Alt. Phone
 - E-Mail Address
- Sage Timeslips Timekeepers with QuickBooks Employee
 - E-Mail Address

Select **Accounting; Set Up Accounting Link** and then switch to the *Linked Names: Options* page to access these options.

Rules

- 1** When the Sage Timeslips name and the QuickBooks name both change
 - Copy data from Sage Timeslips to QuickBooks
 - Copy data from QuickBooks to Sage Timeslips
- 2** When you clear data from a field, also clear the field for the linked name.

- 1** When data changes for the same name in both Sage Timeslips and in your accounting package, you can indicate which change is used.
- 2** When you blank out a field, you can indicate if the blank value can overwrite a field that contains data.



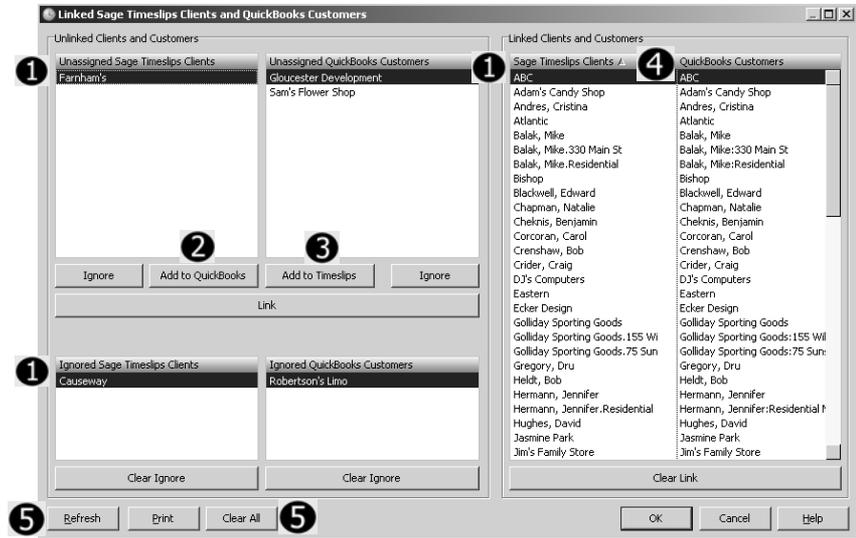
Help

For more information on setting up TAL Pro, look up “**setting up tal pro**” in the Sage Timeslips Help index.

Improved Linking of Names

TAL Pro offers improvements when you manually link Sage Timeslips names to names in your accounting package.

To link names, select **Accounting; Manage Name Links** and choose a name type.



- 1 The list of linked names is now separate from unlinked names and ignored names, making it easier to find names that you want to link.
- 2 When viewing unlinked timekeepers (QuickBooks only) or clients, you can now add the name to your accounting package with a click of a button.
- 3 When viewing unlinked employees (QuickBooks only) or customers, you can now add the name to Sage Timeslips with a click of a button.
- 4 You can now click column headings to sort the linked names. This makes it easier to find the names you want.
- 5 A new **Refresh** button lets you see new names entered in your accounting package. A new **Clear All** button lets you clear all account links at once.



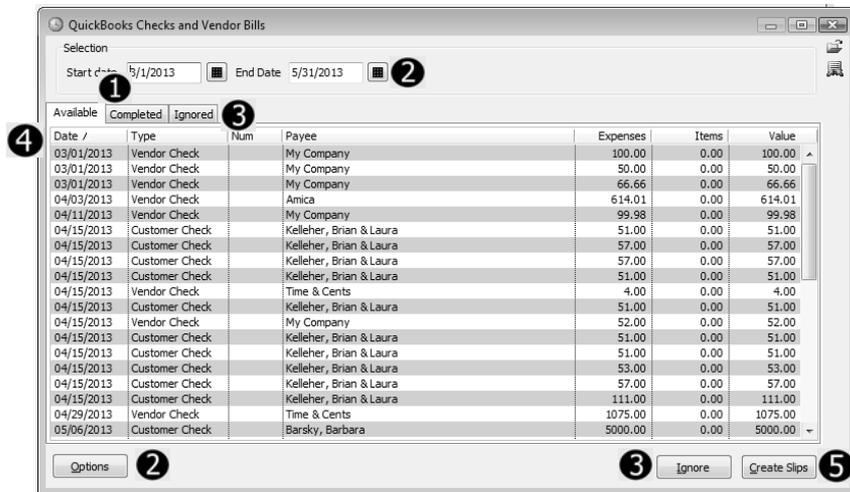
Help

For more information on name links, look up “**setting up name synchronization in tal pro**” in the Sage Timeslips Help index.

Enhancements to Slip Creation

TAL Pro offers improvements when you create slips from accounting transactions.

You can select **Accounting; Create Slips** to start this process.



- 1 The transaction list separates transactions available for slips, from ignored transactions and completed transactions, making it easy to review the status of any accounting transactions.
- 2 You can filter the transaction list by date. You can click the **Options** button to hide certain types of transactions from your accounting package, and hide transactions that do not have customers assigned to line items.
- 3 You can ignore specific transactions that you will never use to create slips. These transactions are moved to the *Ignored* page.
- 4 You can click column headings to sort the transactions list by details like date, type, number, value. This makes it easier to find the account you want.
- 5 Select one or more transactions and click **Create Slips** to create slips for line items on those transactions.



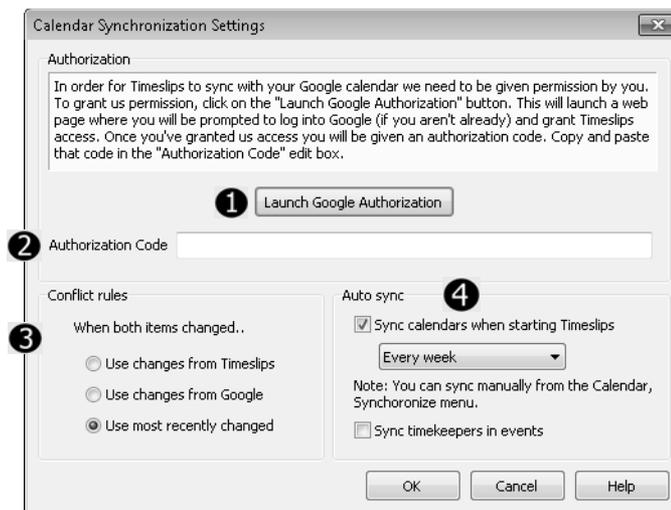
For more information on creating slips, look up “**creating slips: from accounting transactions**” in the Sage Timeslips Help index.

Working with Calendars

Calendar Synchronization

You can now authorize Sage Timeslips to set up a Google calendar and synchronize entries with it.

Select **Calendar; Synchronize; Setup** to open the *Calendar Synchronization Settings* dialog box where you can set up authorization and synchronization settings.



- 1 Click **Launch Google Authorization** to log into your Google account and generate a Google calendar authorization code.
- 2 Copy and paste the code into the *Authorization Code* field.
- 3 Set up conflict rules in case an entry changes in both Timeslips and Google between syncs.
- 4 Set up auto sync rules that determine when Sage Timeslips automatically syncs with your Google calendar.

When you click **OK**, Sage Timeslips will set up the new Google calendar and perform the first sync.



Help

For more information on syncing calendars, look up “synchronizing calendars” in the Sage Timeslips Help index.

Working with TimeCapture

TSTimer has been replaced with a new application called TimeCapture.



For more information on TimeCapture, please see the Help system for TimeCapture.

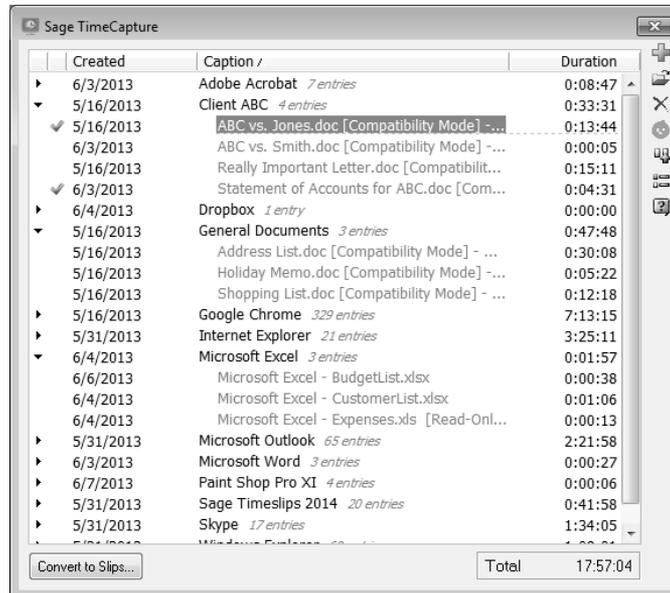
Starting TimeCapture

You can start TimeCapture using the TimeCapture shortcut in your Sage Timeslips 2014 program group.

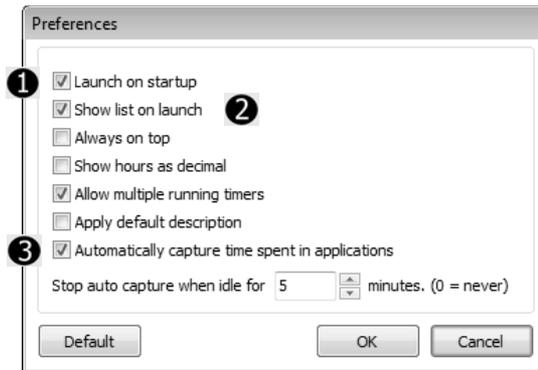
When TimeCapture is running, it will display as an icon in your status bar.



When you double click on the icon, it opens a list of time entries.



Click  to open preferences for TimeCapture. Here you can control how TimeCapture starts and tracks time.

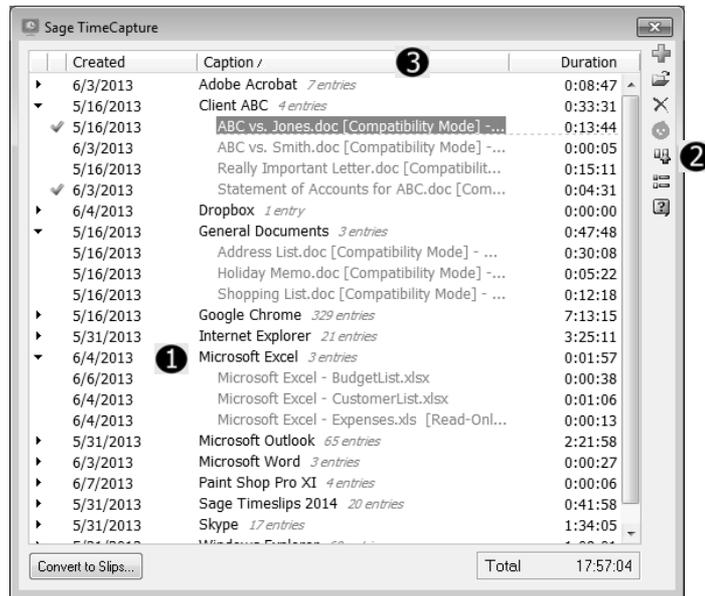


Some examples include:

- 1 you can launch TimeCapture when you start your workstation
- 2 when TimeCapture starts, it can show the list of entries
- 3 when you use other applications, TimeCapture can track the time spent

Tracking Time

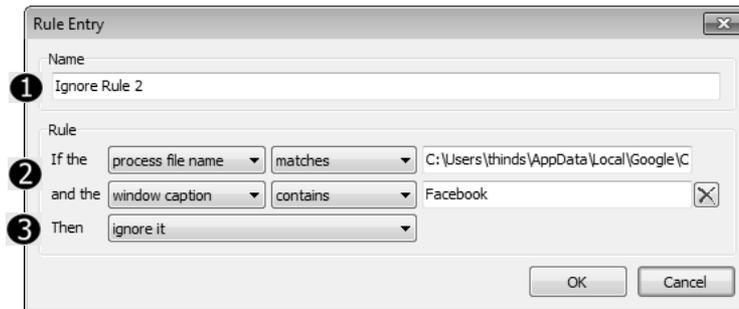
TimeCapture can automatically track time spent in other applications. As it tracks time entries, you can see all the time captured in the time entry list.



- 1 TimeCapture automatically groups entries by the application that was tracked. Each entry represents a different window or page from the application.
- 2 You can click  to create rules that can name or group entries differently. See "Setting Up Rules" on page 4-73 for more information.
- 3 You can click on column headings to sort the list by creation date, caption, or duration.

Setting Up Rules

You can click  to set up time entry rules.



Each rule consists of:

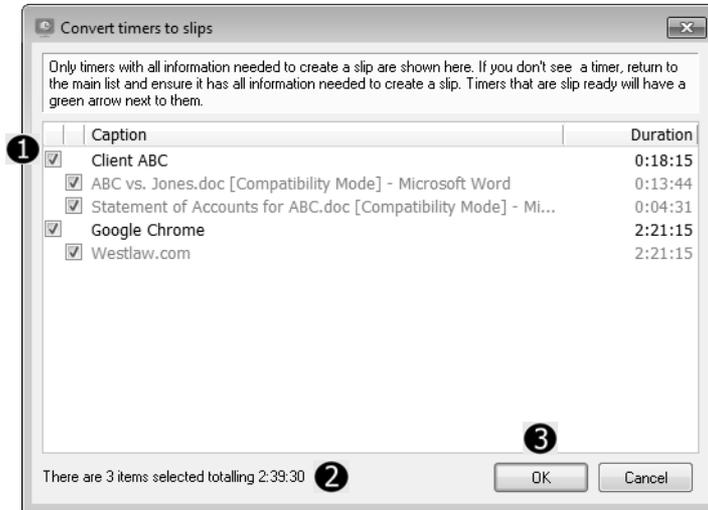
- 1 a rule name
- 2 up to two conditions
- 3 an action to take when the conditions are met

Some examples of rules that you can set up include:

- you can set up rules that prevent TimeCapture from tracking specific applications or windows
- You can set up rules that rename, group, or merge entries based on the application or windows being tracked
- You can set up rules that assign Sage Timeslips names to entries based on the application or windows being tracked.

Converting TimeCapture Entries

You can convert all entries or specific entries into time slips for reporting and billing. Click **Convert to Slips** at the bottom of the Sage TimeCapture entry list to start this process.



- 1 All entries that are assigned names and are ready for transfer are included in the list. Unmark any entry that you do not want to convert at this time.
- 2 The total of entries that will be converted is included at the bottom of the list.
- 3 Click **OK** to convert time entries into time slips so you can include those slips on reports and bills.

Additional Enhancements

Updated dialog boxes

When using the *Reprint Bills* dialog box (select **Bills; Reprint Bills**) to review bill images, you can now resize the dialog box to show more information or click on column headings to sort the list of bill images.



Help

For more information on reprinting bills, look up “reprinting bills” in the Sage Timeslips Help index.

When using the *Time Sheet Slip Template List* dialog box (select **Slips; Time Sheet; Slip Templates**) to maintain time sheet templates, you can now resize the dialog box to show more templates or click on column headings to sort the list of templates.



Help

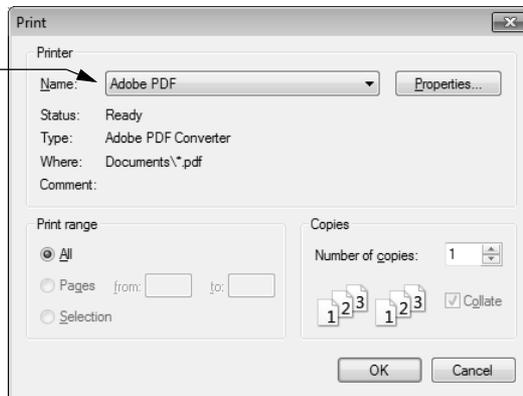
For more information on time sheet templates, look up “time sheet slip templates” in the Sage Timeslips Help index.

Printing from Lists

When printing from lists in Sage Timeslips (such as the *Time and Expense Slip List*, the *Accounts Receivable List*, or the *Client Funds List*), you can now select the printer used to print the report.

For example, if you are reviewing the *Time and Expense Slip List* dialog box and click **Print** from the toolbar, the *Print* dialog box will open allowing you to pick the destination for the report.

Select a printer from the list and click **Print**.



3 *Sage Timeslips 2014*
Sage Timeslips Upgrader's Guide

Sage Timeslips 2013

4

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• Sage Timeslips 2013 •

New Features in Sage Timeslips 2013

This chapter details the new features added in Sage Timeslips 2013.



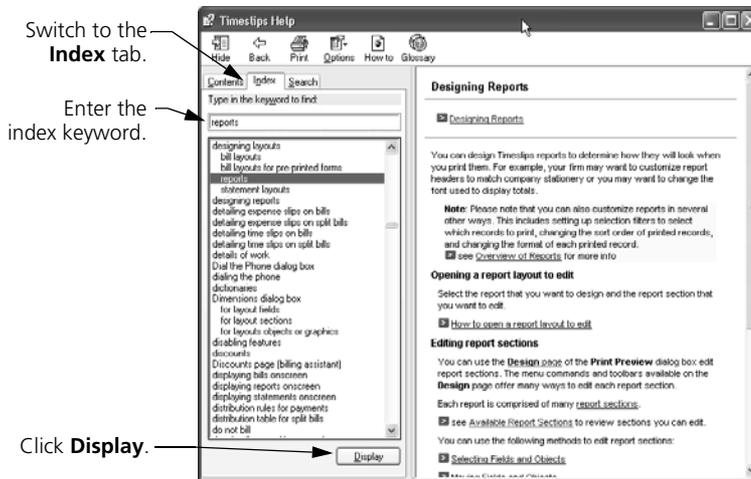
For a comprehensive list of all changes to Sage Timeslips, select **Help; What's New**. This topic discusses new features and changes for each past version.

How to find more information about each feature

Throughout this guide, we provide index keywords that direct you to comprehensive information available within the online Help.

To find the additional Help information:

- 1 Within Sage Timeslips 2014, select **Help; Online User's Guide**.
- 2 Switch to the **Index** tab of the *Sage Timeslips Help* dialog box.
- 3 Enter the index keyword. For example, to find more information about designing reports, look up **designing layouts** and choose **reports**.

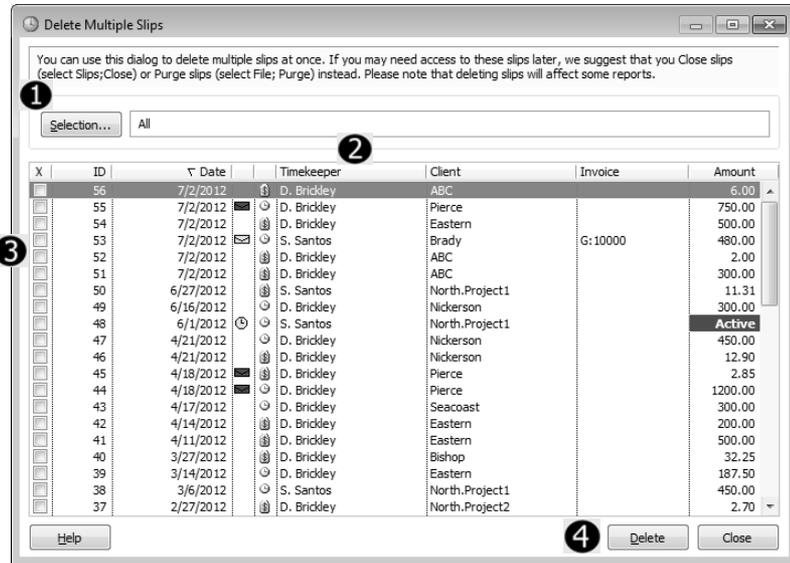


- 4 Click **Display** to display the Help topic.

Working with Slips

Deleting Multiple Slips

When maintaining slips, you can now delete many slips at once. Select **Slips; Delete Multiple Slips** to start this process.

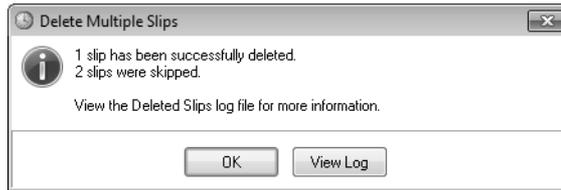


Within the *Delete Multiple Slips* dialog box:

- 1 Click the **Selection** button to optionally filter the slips displayed in the list.
- 2 Click on a column heading to optionally sort the list by that field.
- 3 Mark the slips that you want to delete.
- 4 Click **Delete** to delete the marked slips.

Before deleting slips, Sage Timeslips prompts you to back up your database. We suggest that you back up at this time.

After deleting slips, Sage Timeslips indicates if all slips were deleted successfully. For example, you may be prevented from deleting slips with an active timer or slips that were on a bill that can still be undone.



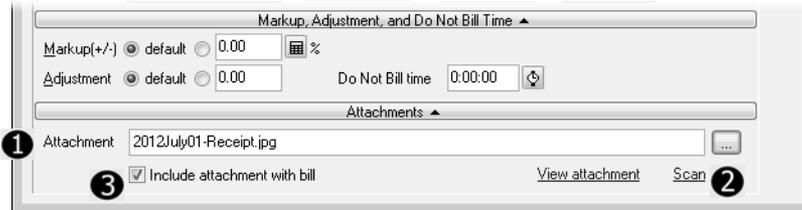
Click **View Log** to view the details if some slips were skipped.



For more information on this process, look up “**deleting multiple slips**” in the Sage Timeslips Help index.

Attaching Files to Slips

On the *Slip Entry* dialog box, you can now attach files such as receipt images to slips.



When viewing a slip:

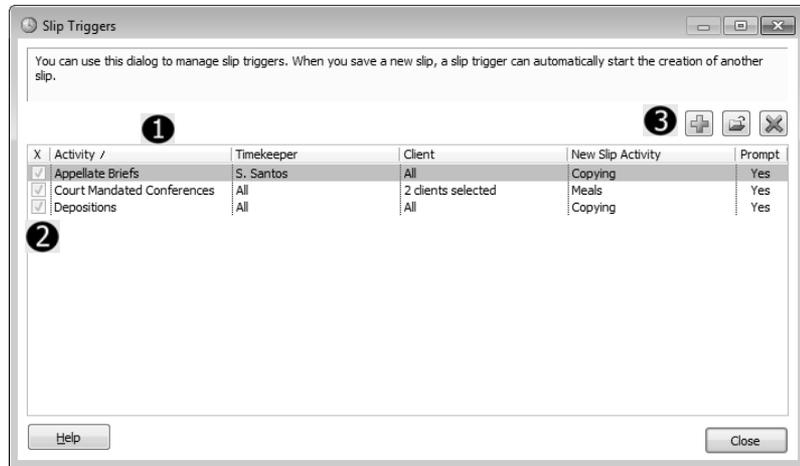
- 1 You can type in the location and name of a file to attach, or you can click **Browse**  to select a file.
- 2 If you don't have the file already saved, you can click **Scan** to scan a new image.
- 3 You can optionally mark **Include attachment with bill** to include the attachment with emailed bills. You can also include some image files with printed bills.



For more information on slip attachments, look up “**attaching files to slips**” in the Sage Timeslips Help index.

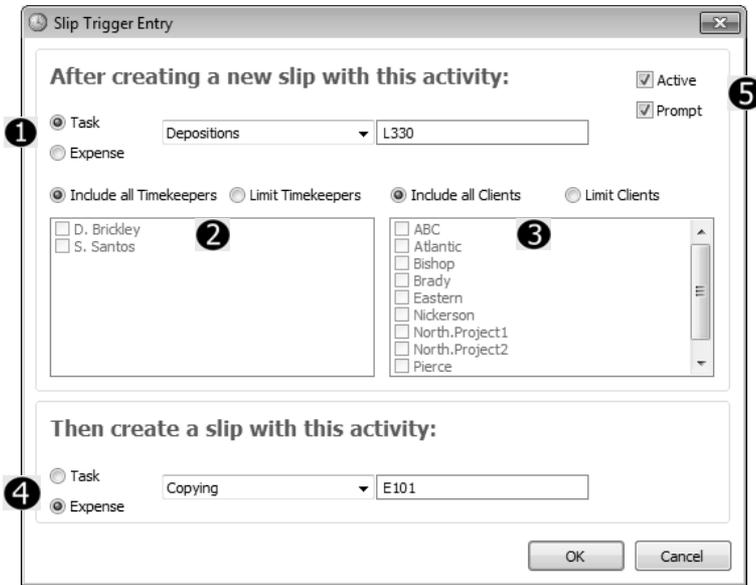
Triggering Slips

When you save a new slip, Sage Timeslips can now start creating another new slip. Select **Slips; Slip Triggers** to open the *Slip Triggers* dialog box where you can set up rules to control this process.



The *Slip Triggers* dialog box list all the current trigger rules. From here you can:

- 1 Click on column headings to quickly change the sort order of trigger rules.
- 2 Mark or unmark trigger rules to indicate if they are active or inactive.
- 3 Use the tools in the upper right to add, edit, or delete trigger rules.



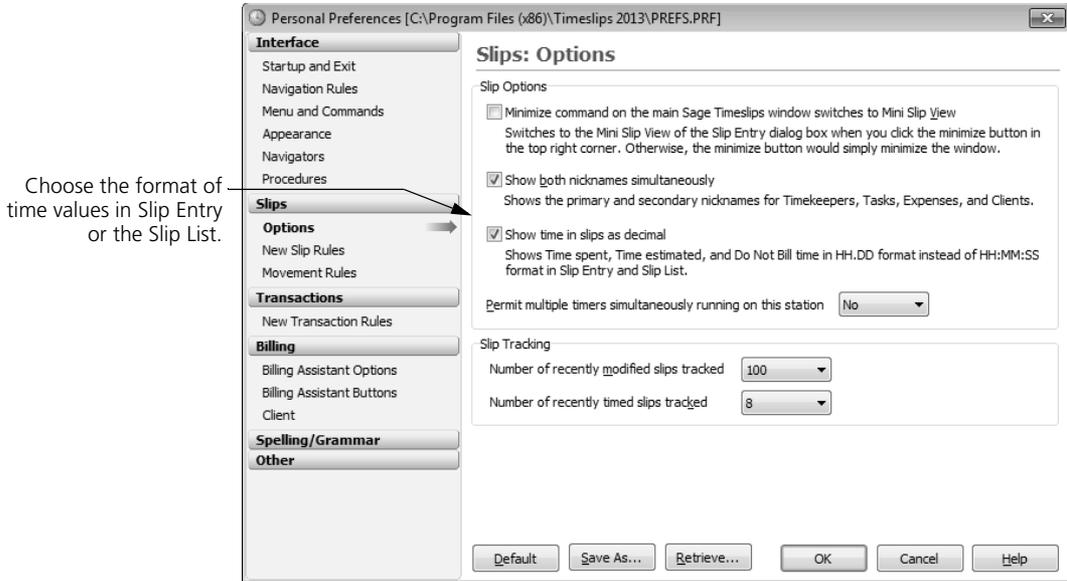
When adding a trigger rule:

- 1 Choose a task or expense. When you save a new slip with this task or expense, Sage Timeslips can start creating another new slip with the activity listed below (4).
- 2 Choose the timekeepers that this trigger rule applies to.
- 3 Choose the clients that this trigger rule applies to.
- 4 Choose the activity that will be copied onto the new slip.
- 5 Indicate if this trigger rule is active and if Sage Timeslips will prompt you to create the new slip (or if the creation process will happen automatically).

Choosing Time Format on Slips

You can now display hourly values in decimal format on HH:MM:SS format on the Slip List or Slip Entry.

Select **Setup; Preferences** and then choose **Slips: Options** from the left side to access this new preference.



Mark *Show time in slips as decimal* to show time in decimal format. For example two and a half hours will display as 2.5.

Unmark *Show time in slips as decimal* to show time in HH:MM:SS format. For example two and a half hours will display as 2:30:00.



For more information on setting up preferences, look up “preferences” in the Sage Timeslips Help index.

Restricting Slip Entry

You can now restrict slip entry for dates that have passed or for large time values.

Select **Setup; General** and then choose **Slips, A/R & Funds** from the left side to access these new settings.

Choose if you want to restrict slip entry for all timekeepers.

General Settings

Firm

- Address Information
- Terminology
- Calendar Terminology
- Other

Financial

- Aging Periods
- Rules

Names

- Nicknames
- New Names
- Employee Titles
- Conflict Checking

Transactions

- Bills
- Slips, A/R, & Funds**
- Default Descriptions
- Fee Allocation
- Payment Types

Transactions: Slips, A/R, & Funds

Transaction ID
Determines the ID of the next transaction that you create. This number increments as you enter new transactions. You can enter a custom ID in this field.

Next slip ID: 60

Next A/R ID: 19

Next funds ID: 3

A/R Transactions
When marked, Sage Timeslips will automatically use the client's A/R balance on new payment, credit, and write-off transactions.

Use current A/R balance for new payments, credits, and write offs

Slips

Do not allow saving slips with a date before: 7/9/2012

Do not allow saving slips with a time spent greater than: 8:00:00

OK Cancel Help

There are also new security rights that determine if Sage Timeslips will warn you if you violate these restrictions or prevent you from saving the slip.

Select **Setup; Security; Profiles** and then switch to the *Slip* area to access these new rights.



Restricting slips by date

To **restrict** slips by date, in General Settings mark *Do not allow saving slips with a date before* and then enter a date. Please note that the date you enter can be a relative date. For example, you can set up a relative rule to the first of the month, so then the date updates automatically each month.

When you enter slips, if the slip date is before the date entered in General Settings, Sage Timeslips will warn you when you save the slip so you are alerted to the restriction, but you can continue saving the slip.

To **prevent** slips by date, change the settings as indicated above, but also set up security. Go to the *Slip* area and unmark *Allow slip creation on restricted date*.

When you enter slips, if the slip date is before the date entered in General Settings, Sage Timeslips will warn you when you attempt to save the slip and you will not be able to save the slip unless you change the date.

Restricting slips by time spent

To restrict slips by time spent, in General Settings mark *Do not allow saving slips with a time spent greater than* and then enter a time value.

When you enter slips, if the slip's time spent is more than the value entered in General Settings, Sage Timeslips will warn you when you save the slip so you are alerted to the restriction, but you can continue saving the slip.

To prevent slips by date, change the settings as indicated above, but also set up security. Go to the *Slip* area and unmark *Allow slip creation on restricted time spent*.

When you enter slips, if the slip's time spent is more than the value entered in General Settings, Sage Timeslips will warn you when you attempt to save the slip and you will not be able to save the slip unless you change the time spent.



For more information on these restrictions, look up “restricting slip entry” in the Sage Timeslips Help index.

Preventing deleting billed slips

You can now set up security to prevent users from deleting billed slips.

Select **Setup; Security; Profiles** and then switch to the *Slip* area to access this new right.

You can allow or prevent users from deleting billed slips.



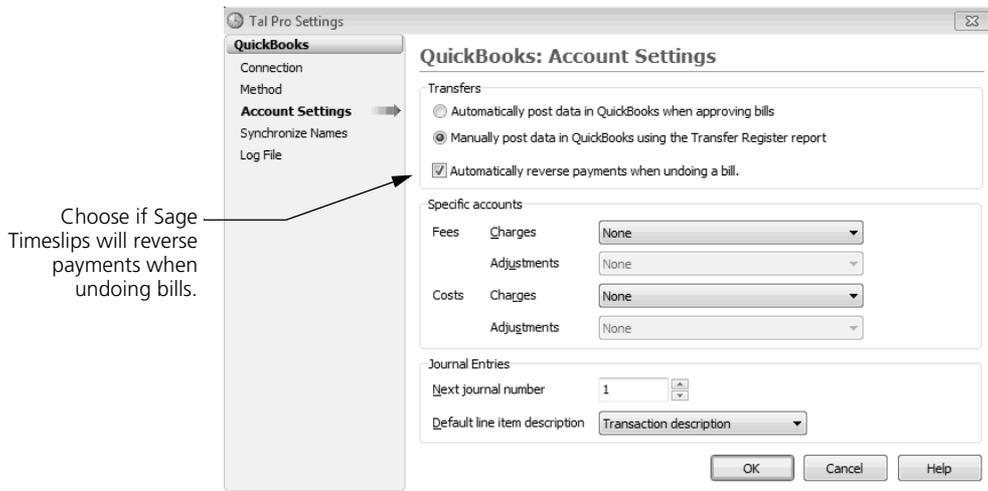
For more information on security, look up “security rights” in the Sage Timeslips Help index.

Working with Transactions

Undoing bills when using TAL Pro

When using TAL Pro to link to Sage 50 or QuickBooks, you can transfer transaction details (such as invoices and payments) from Sage Timeslips to your General Ledger. When you undo a bill, Sage Timeslips sends reversing entries to your General Ledger.

You can now control if Sage Timeslips will reverse payments when you undo bills.

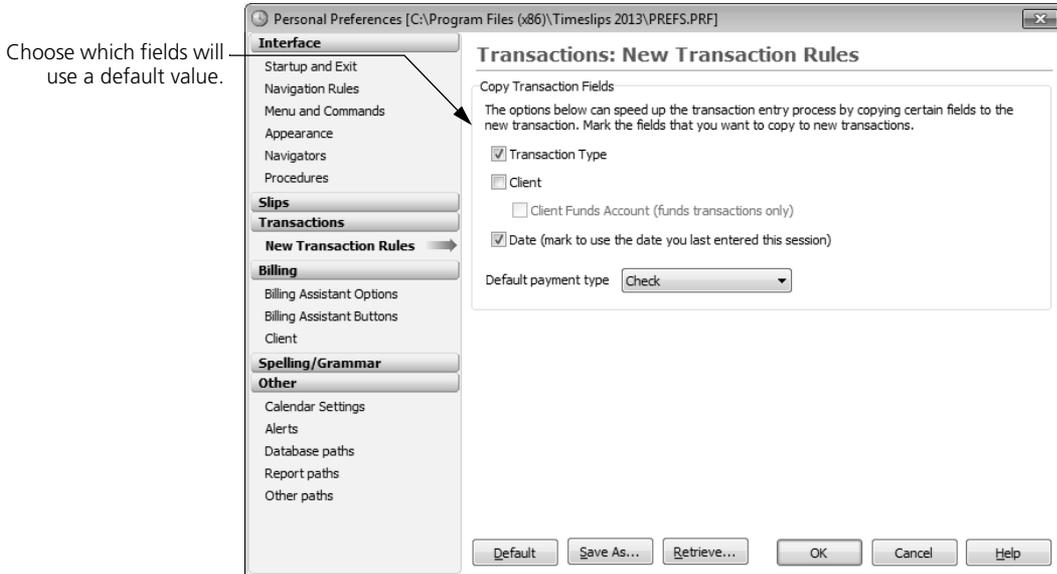


For more information on linking with TAL Pro, look up “TAL Pro” in the Sage Timeslips Help index.

Choosing transaction defaults

If you enter transactions in batch, you can now control how transaction fields are populated with default values.

Select **Setup; Preferences** and then choose **Transactions: New Transaction Rules** from the left side to access this new preference.



Mark the transaction fields that you want to be copied from the current transaction to a new transaction.



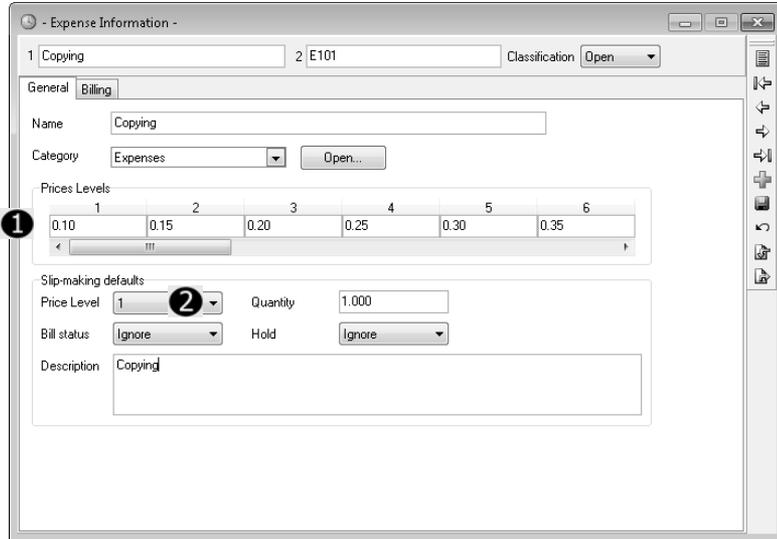
Help

For more information on setting up preferences, look up “**preferences**” in the Sage Timeslips Help index.

Working with Names

Multiple prices on expenses

Each expense can now store up to twenty prices. You can set up these prices on the *Expense Information* dialog box.



- 1 Enter up to twenty different prices for the expense
- 2 Indicate which price is the default for this expense.

When selecting the expense on a slip, you can then choose which price to use on this slip.

The screenshot shows the 'Slip Entry: Expense' window. The 'Type' is set to 'Expense' and the 'Value' is 0.10. The 'Expense' field is set to 'Copying' and the 'Price' field is set to 0.10. The 'Price' dropdown menu is highlighted with a circled '1', and the 'Price' field is highlighted with a circled '2'.

- 1 Select a Price level from the list.
- 2 The associated Price value will be copied to the field. You can also manually enter a Price if needed.

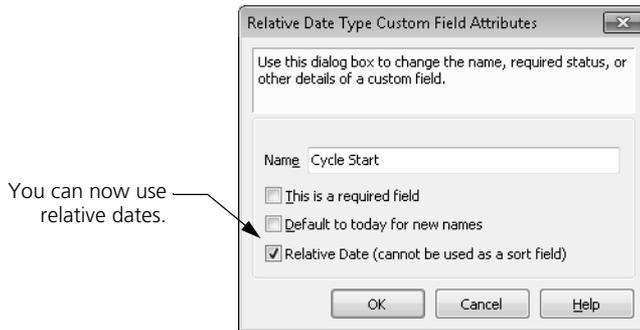


For more information on expense prices, look up “price on expense slips” in the Sage Timeslips Help index.

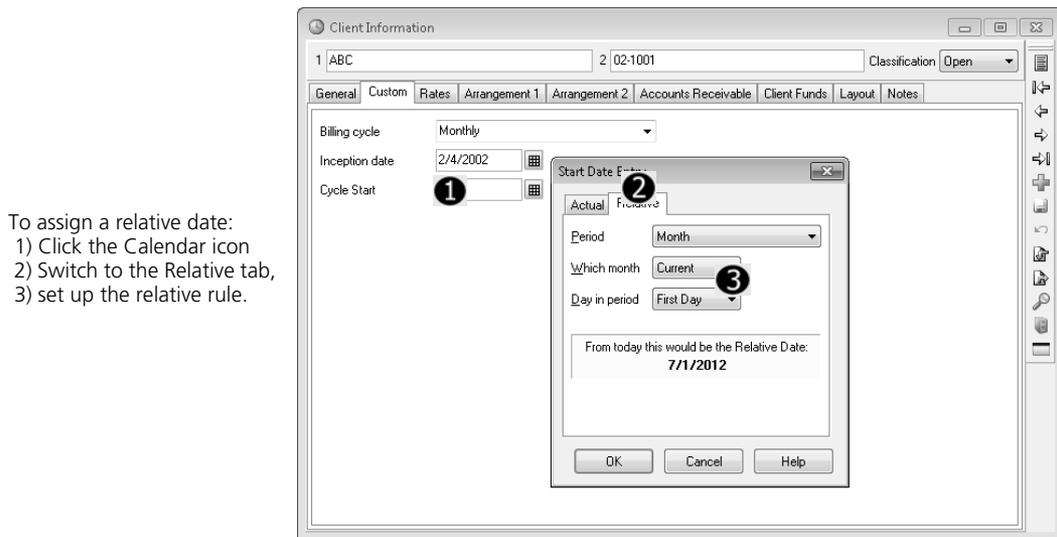
Custom date fields can use relative dates

When tracking dates for clients, timekeepers, or activities, you can now use relative dates.

Select **Setup; Custom Fields** to edit a custom field. Double click on a date custom field to change its attributes. Mark *Relative Date* if you want to use relative dates with this field.



When a custom date field is marked to use relative dates, you can set its value to relative date.

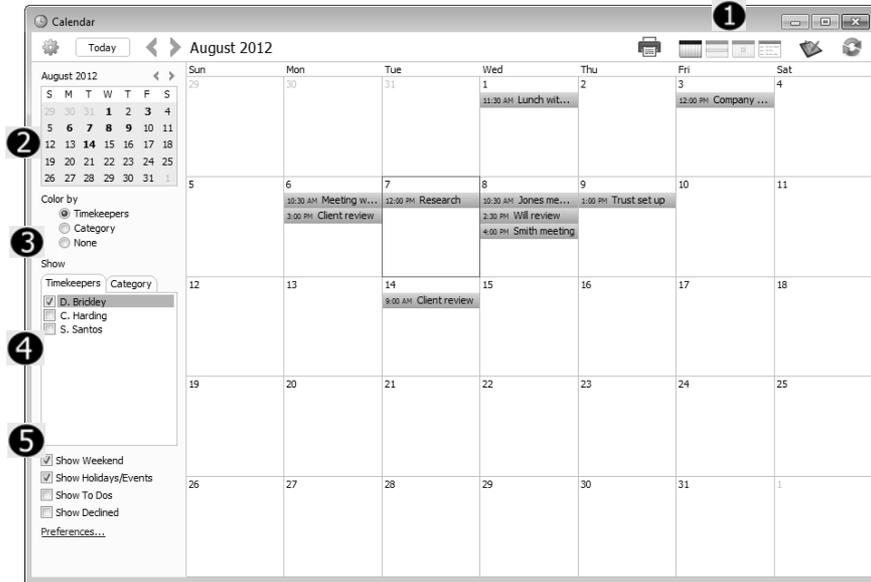


For more information on custom fields, look up “custom fields” in the Sage Timeslips Help index.

Working with Calendars

You can now track appointments, events, and to do items with an integrated calendar.

Select **Calendar**; **View Calendar** to open your calendar.



There are several controls at the top and to the left of the calendar you can use to work with the calendar:

- 1 Each calendar has four views to display entries. Use these buttons at the top of the calendar to change views:

 Month view,  Week view,  Day view,  List view

- 2 Use the Mini Calendar to quickly view other dates. Then you can click on another date to move to it.
- 3 Use the *Color by* field to color entries on the calendar by timekeeper or by category
- 4 Use the *Show entries for* list to show or hide entries for specific timekeepers or categories
- 5 Use the other *Show* options to further filter which entries display on the calendar



For more information on calendar entries, look up “calendar” in the Sage Timeslips Help index.

Creating new entries

To create a new entry, open the *Calendar* menu and select **New Meeting**, **New Holiday/Event**, or **New All Day Holiday/Event**.

You can also double click on an empty cell to create a new meeting for that day and time.

When creating a meeting:

- 1 The fields at the top of the meeting contain general information, like the subject, time, and date of the meeting.
- 2 The fields on the bottom of the meeting contain three groups of fields that let you invite attendees, enter notes, and set slip creation defaults.
- 3 On the Attendees tab you can set your attendance status and set up a reminder.
- 4 On the Attendees tab you can invite other timekeepers to the meeting and view their attendance status.
- 5 You can mark an entry for slip creation. When that entry is complete, you can create a new slip based on its details.

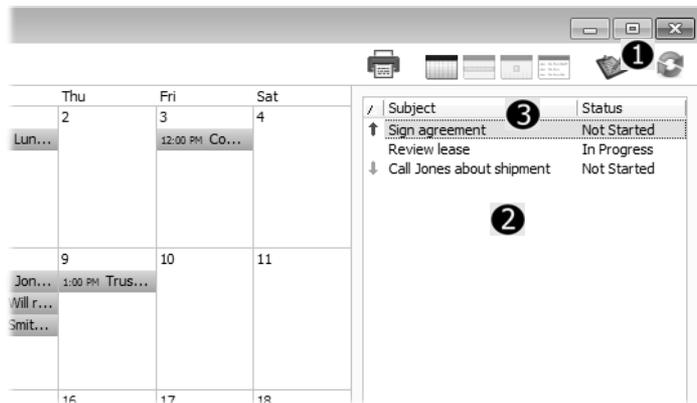
Editing entries

You can change the date and time of an entry quickly. Simply click on the entry and drag it to another date or time.

To view or change other details for an entry, you can double click on it to access its details.

Managing to do items

Each timekeeper can maintain a private to do list.



- 1 Click  from the top of the calendar to show or hide your To Do list.
- 2 Right click on the To Do list and select **New** to create a new To Do entry.
- 3 Right click on the To Do list and select **Third Column** to determine which to do field displays in the third column of the list. Click on any column heading to sort the list by that column.

Working with Reports

Days to Pay report

You can now print a report that forecasts the number of days that it takes clients to pay their bills.

Select **Reports; A/R Transactions** to open the list of A/R transaction reports. The Days to Pay report is listed in this group of reports.

6/7/2012 3:00 PM		Willis & Henderson Days To Pay				Page 1	
Selection Criteria							
Clie. Classification Clie. Controller		Open Include: Brady, T					
Client / Phone	Balance	Last Unpaid Invoice Date	Days Until Payment	Last Payment Date	Last Payment Amount	Average Days to Pay	
Austin, F (781) 555-1234	\$725.00	12/6/2011	-50	10/20/2011	\$750.00	134	
Ball, M (508) 555-2345	\$525.00	5/22/2012	35	1/10/2011	\$900.00	51	
Barnes, M (404) 555-9876	\$75.00	5/22/2012	12	3/18/2005	\$611.00	28	
Barron, E (978) 555-1212	\$1,411.56	5/22/2012	42	3/16/2011	\$1,600.00	58	
Finch, J (678) 555-8888	\$1,958.80	5/22/2012	-5	2/15/2011	\$600.00	11	
Fitzgerald, I (303) 555-5432	\$59.86	5/22/2012	4	7/10/2011	\$750.00	20	
Gould, L (212) 555-4545	\$3,652.72	5/22/2012	16	4/26/2005	\$1,141.50	32	
Guzman, R (333) 555-3333	\$625.00	5/22/2012	30	2/4/2011	\$200.00	46	
Hoover, S (413) 555-2890	\$856.25	5/22/2012	28	3/18/2011	\$700.00	44	
Ingram, D (781) 555-2056	\$16.00	5/22/2012	-6	11/4/2011	\$650.00	10	
Kirby, R (978) 555-5768	\$917.76	5/22/2012	12	4/2/2011	\$1,000.00	28	
Mckay, J (781) 555-3344	\$3,280.68	5/22/2012	73	10/24/2011	\$11,200.00	89	
Neal, E (888) 555-8888	\$14.00	5/22/2012	12	10/8/2011	\$400.00	28	
Ross, W (456) 555-1654	\$60.00	5/22/2012	17	8/1/2011	\$525.00	33	
Grand Total	\$14,177.63						

This report is fully customizable using the report designer. You can add more fields to the report or delete any field. Using report options, you can exclude clients that have a zero balance.



For more information on this report, look up “days to pay report” in the Sage Timeslips Help index.

Using dates in calculations

When designing user defined reports you can create your own custom calculations that can appear on the report. You can now use date fields within those calculations.

You can now use date fields in calculations.



For more information on calculations, look up “calculations” in the Sage Timeslips Help index.

Slip notes on pre-bill worksheets

When printing pre-bill worksheets, you can now include slip notes for each slip. Before printing the worksheet, open the *Report Options* dialog box and mark **Slip notes**.

You can show slip notes for each slip.

Date ID	Timekeeper Task	Rate Markup %	Hours DNB Time	Amount DNB Amt	Total
6/22/2012	D. Brickley 31 Draft/revise	175.00	1.50	262.50	Billable

Notes: 7/10/2012 4:47:46 PM - HTH: Need to check with David about this charge.

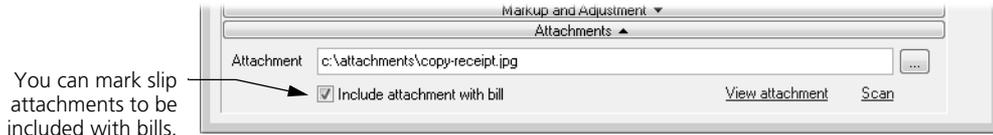


For more information on slip notes, look up “slip notes” in the Sage Timeslips Help index.

Working with Bills

Including file attachments with bills

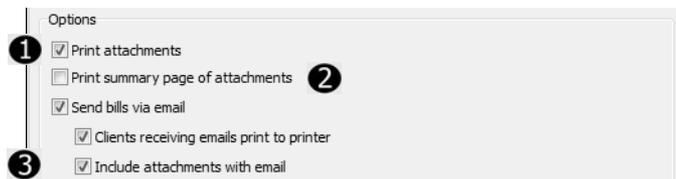
On the *Slip Entry* dialog box, when you attach a file to a slip you can mark the attachment to be included with bills.



On the *Document Shortcuts* dialog box, when you create a document shortcut you can mark the file to be included with bills.



When you print bills or send bills by email, a new bill option lets you include marked attachments with the bill.



Before printing bills:

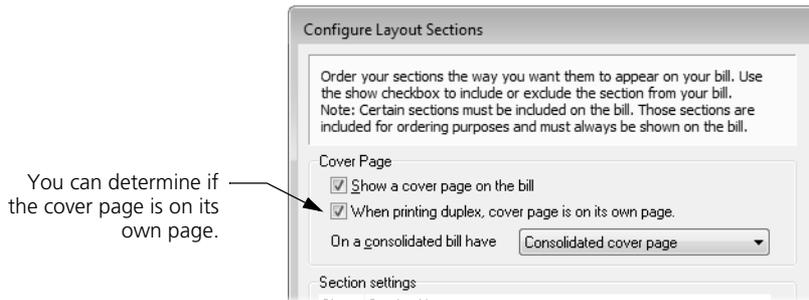
- 1 When printing bills to printer, mark *Print attachments* to print a copy of associated attachments after the bill. Sage Timeslips can only print attachments in BMP, DIB, JPG, TIF, PNG, EMF, or WMF format.
- 2 When printing bills to printer, mark *Print summary page of attachments* to review the associated attachments from slips and clients, with a status on whether the attachments were able to print.
- 3 When sending bills by email, mark *Include attachments with email* to include a copy of associated attachments with the email message. Sage Timeslips can attach any types of files that your firm's email system can use.

Printing bills on duplex printing

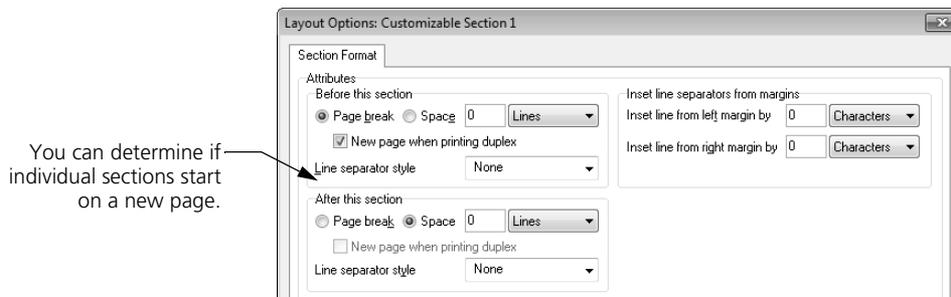
If you use a duplex printer when printing bills, Sage Timeslips now starts each client on a new sheet of paper.

You can also use new bill design settings to control the cover page and other bill sections.

In the *Configure Layout Sections* dialog box, mark *When printing duplex, cover page is on its own page* to ensure a new piece of paper is used after the cover page.



In previous version, you've been able to control page breaks before and after specific layout sections within the *Layout Options* dialog box. Now when you've set up a page break, you have a new option to determine if you are starting a section on a new page or on a new sheet of paper.

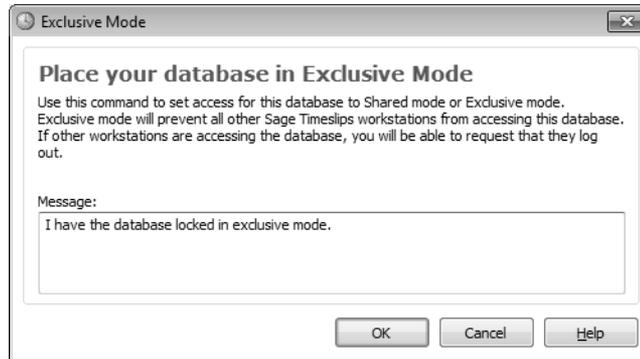


For more information on designing layouts, look up “bill design” in the Sage Timeslips Help index.

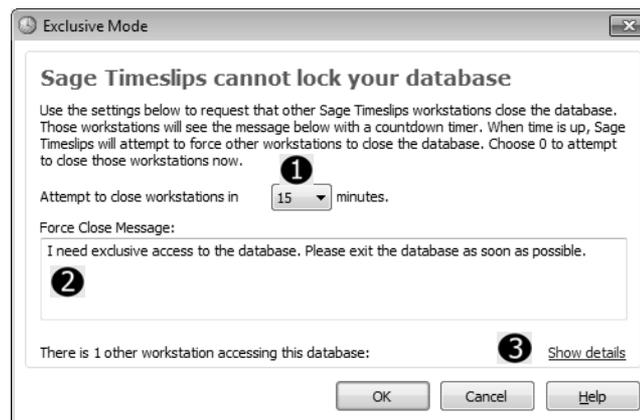
Working with Databases

Exclusive access

In Sage Timeslips 2012, you had the ability to lock a database in exclusive mode in case you needed to perform database maintenance. You can start this process by selecting **Special; Exclusive Mode**.

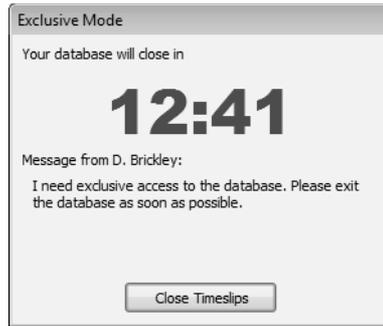


When you try to lock the database in exclusive mode, if any other workstations are accessing the database, additional options become available:

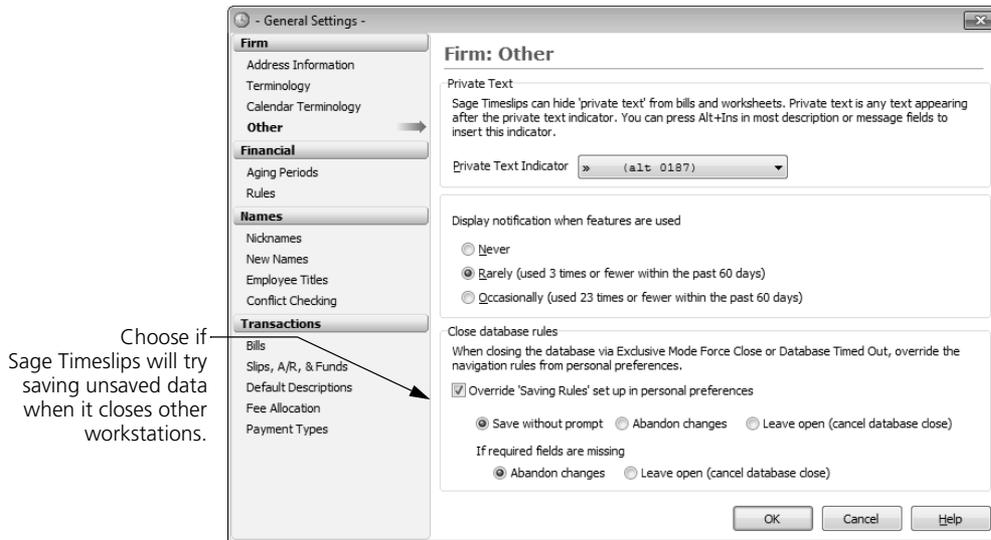


- 1 You can set a countdown that will appear on other workstations. When the count reaches **0:00**, Sage Timeslips will attempt to close other workstations.
- 2 You can set a message that will appear with the countdown.
- 3 You can review a list of workstations accessing the database, in case you want to contact them.

Other workstations accessing the database will receive the message and a countdown timer within Sage Timeslips.



When the countdown timer reaches 0:00, Sage Timeslips will attempt to close other workstations. In *General Settings*, there are new database settings that control what to do with unsaved data on those workstations.



For more information on exclusive mode, look up “exclusive mode” in the Sage Timeslips Help index.

Sage Timeslips 2012

5

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• Sage Timeslips 2012 •

New Features in Sage Timeslips 2012

This chapter details the new features added in Sage Timeslips 2012.



Help

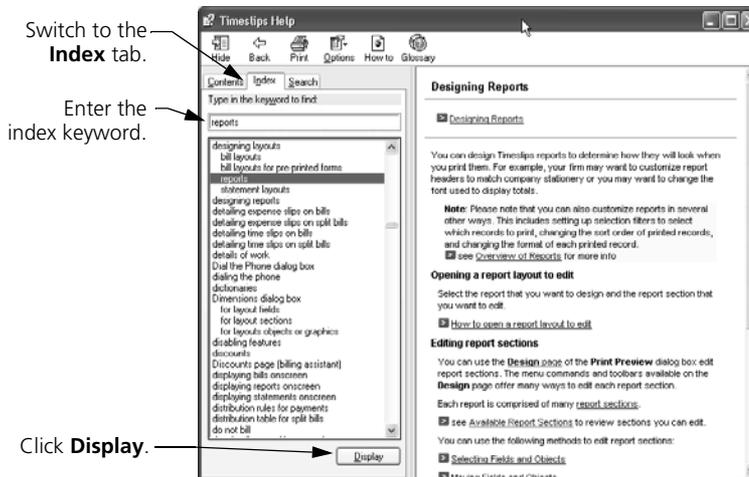
For a comprehensive list of all changes to Sage Timeslips, select **Help; What's New**. This topic discusses new features and changes for each past version.

How to find more information about each feature

Throughout this guide, we provide index keywords that direct you to comprehensive information available within the online Help.

To find the additional Help information:

- 1 Within Sage Timeslips 2014, select **Help; Online User's Guide**.
- 2 Switch to the **Index** tab of the *Sage Timeslips Help* dialog box.
- 3 Enter the index keyword. For example, to find more information about designing reports, look up **designing layouts** and choose **reports**.



- 4 Click **Display** to display the Help topic.

Program Settings

Updated Settings

General Settings dialog box

The *General Settings* dialog box (select **Setup; General**) has been updated to provide easier access to groups of settings.

Choose a settings group from the menu on the left.

The screenshot shows the 'General Settings' dialog box with a left-hand menu and a main content area. The menu on the left is organized into groups: 'Firm', 'Financial', 'Names', and 'Transactions'. The 'Firm' group is selected, and 'Address Information' is highlighted within it. The main content area is titled 'Firm: Address Information' and contains fields for Name, Address, City, State, ZIP Code, and Phone Numbers. The Name field contains 'Willis & Henderson, P. C.', the Address field contains '133 S. Main Street' and 'Suite 1402', the City field contains 'Essex', the State field contains 'MA', and the ZIP Code field contains '01929'. The Phone Numbers section includes fields for Phone 1, Phone 2, Eax 1, and Fax 2, with example numbers provided.

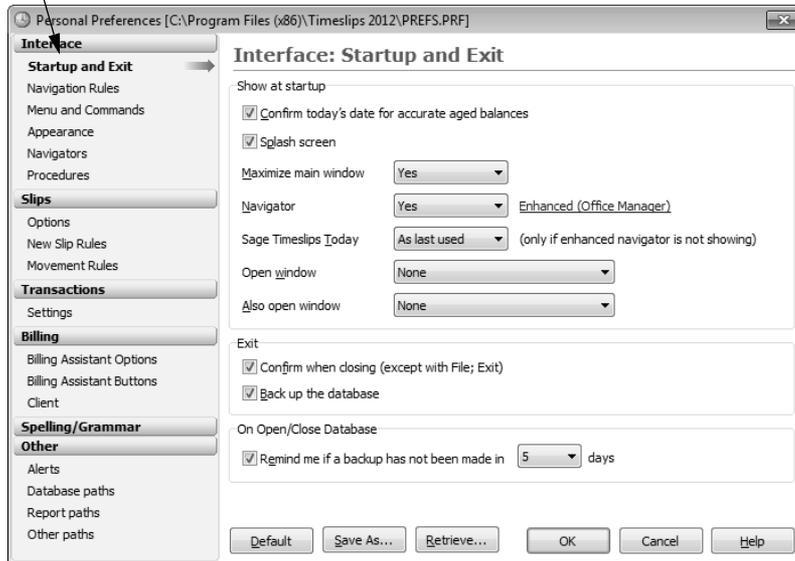


For more information on General Settings, look up “General Settings” in the Sage Timeslips Help index.

Personal Preferences dialog box

The *Personal Preferences* dialog box (select **Setup; Preferences**) has been updated to provide easier access to groups of settings.

Choose a preference group from the menu on the left.



Help

For more information on Personal Preferences, look up “**Personal Preferences**” in the Sage Timeslips Help index.

Changes to preferences include:

- When customizing the buttons on the Billing Assistant, you can now choose more colors for the buttons.

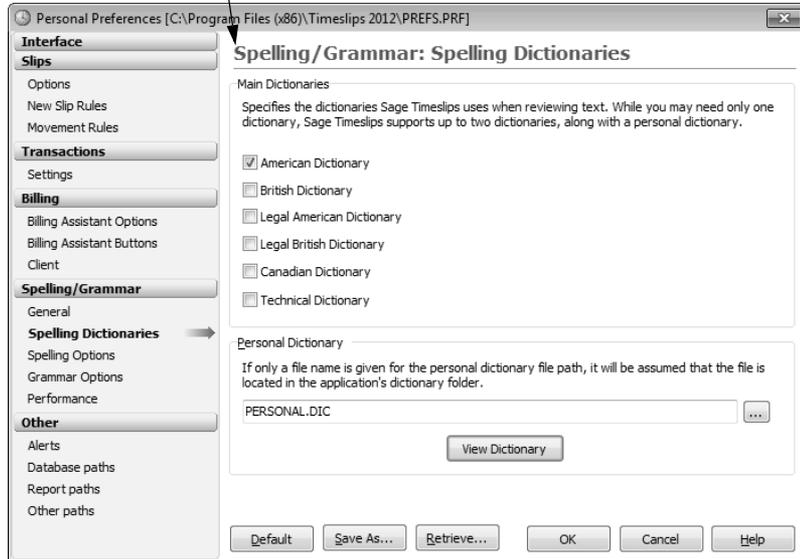
These settings are on the *Billing Assistant Buttons* page of the *Personal Preferences* dialog box.

- When using alerts, you can choose where triggered alerts will appear. This setting is on the *Alerts* page of the *Personal Preferences* dialog box.
- You can now choose a default path for backups and for new databases.

This setting is on the *Database Paths* page of the *Personal Preferences* dialog box.

Checking Spelling and Grammar

The *Spelling Dictionaries* page includes new options for checking for spelling errors.



You can now use up to six dictionaries when searching for spelling errors.

There is also new *Technical Dictionary* available.

You can click **View Dictionary** to view and edit the entries in your personal spelling dictionary.

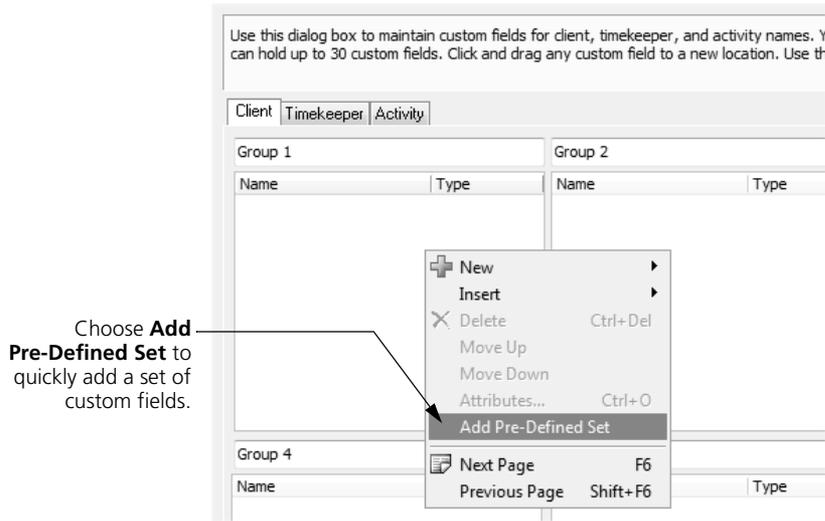


For more information on setting up spelling and grammar checking, look up “Checking for Spelling and Grammar Errors” in the Sage Timeslips Help index.

Setting Up Custom Fields

If you use electronic billing (audit house) links, you typically need to use the *Custom Fields* dialog box (select **Setup; Custom**) to set up custom fields for that link.

You can now quickly add all custom fields needed for an electronic billing link. Right click in any group and choose **Add Pre-Defined Set**.



For more information on setting up custom fields, look up “custom fields” in the Sage Timeslips Help index.

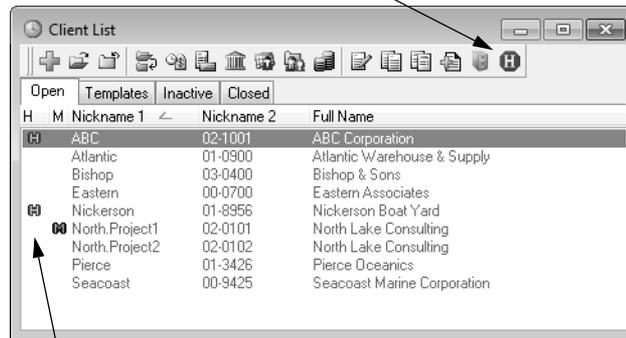
Working with Names

Hold the full bill

If you use the Hold options (located in the *Arrangement 1* page of *Client Information*) to hold clients from billing, it's now easier to review and change *Hold the full bill* option.

You can now review the *Hold the full bill* option for all clients from the Client List dialog box.

You can quickly toggle the *Hold the full bill* setting for the selected client.



The current *Hold the full bill* status is listed for each client.



Help

For more information on bill hold settings, look up “holding charges from billing” in the Sage Timeslips Help index.

There is a new preference that determines if the Hold options display on the Client List. On the *Billing: Client* page of the *Personal Preferences* dialog box, you can unmark *Show full bill Hold setting on the Client List* to hide these settings.

Billing: Client

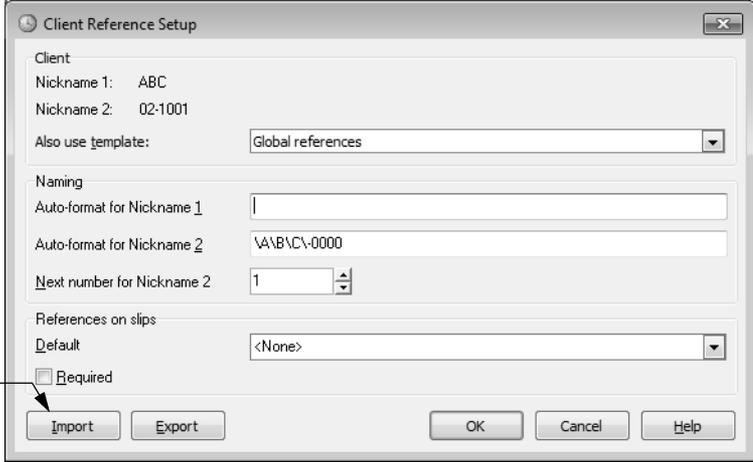
Show full bill Hold setting on the Client List

Reference settings

You use the *Client Reference Setup* dialog box (select **Names; Client References** select a client, and click **Client Setup**  from the toolbar) to set up reference defaults for each client.

You can now click **Import** or **Export** to transfer those settings to other clients to save setup time.

Click **Import** or **Export** to transfer reference settings to other clients.



For more information on reference settings, look up “client references” in the Sage Timeslips Help index.

Purging closed names

When purging closed names from the database using the *Purge* dialog box (select **File; Purge**), you can now use more filters to help you select which names to purge.

When purging names, choose **Use filters** and then click **Filters** to use selection filters.



For more information on purging close names, look up “purging data” in the Sage Timeslips Help index.

Working with Slips and Transactions

Entering and Editing Slips and Transactions

Changing text case or reviewing text length

When entering or editing description text on slips or transactions, you can quickly change the case of the text to use uppercase, lowercase, proper case, or sentence case.

You can also quickly find the length of description text, counting characters or words.

Right click in any description field for a list of additional commands.

Uppercase	Shift+Ctrl+U
Lowercase	Shift+Ctrl+L
Sentence Case	Shift+Ctrl+S
Proper Case	Shift+Ctrl+P
Word Count	Shift+Ctrl+W



Help

For more information on formatting text, look up “entering descriptions” in the Sage Timeslips Help index.

Setting up payment types

When you enter new payments, you select a payment type.

You can indicate the type of payment, such as check, cast, or credit card.

The screenshot shows a window titled "- Accounts Receivable Entry -". It contains a table with the following data:

ID	New	
A/R balance	2100.00	Total funds balance 0.00
Type	Payment	Check
Client	ABC	02-1001

An arrow points from the text above to the "Check" dropdown menu in the "Type" row.

However, there may be payment types that you do not use.

Using settings within the *General Settings* dialog box (select **Setup; General** and choose **Payment Types**), you can choose which payment types to show or hide.

Transactions: Payment Types

The following Payment Types are available when entering payments in Sage Timeslips. The Pre-Defined Types will appear at the top of the list. You can use the Customizable Types to define additional Payment Types for your firm.

Unmark the payment types that you want to hide.

<input checked="" type="checkbox"/> Unknown	<input checked="" type="checkbox"/> Other 1
<input checked="" type="checkbox"/> Check	<input checked="" type="checkbox"/> Other 2
<input checked="" type="checkbox"/> Cash	<input checked="" type="checkbox"/> Other 3
<input checked="" type="checkbox"/> American Express	<input checked="" type="checkbox"/> Other 4
<input checked="" type="checkbox"/> Visa	<input checked="" type="checkbox"/> Other 5
<input checked="" type="checkbox"/> Master Card	
<input checked="" type="checkbox"/> Discover	
<input checked="" type="checkbox"/> Japan Credit Bureau (JCB)	
<input checked="" type="checkbox"/> Debit Card	
<input checked="" type="checkbox"/> Electronic Transfer	



For more information on setting up payment types, look up “**General Settings dialog box: Payment Types**” in the Sage Timeslips Help index.

Setting up a default payment type

When entering new payments, there may be a payment type that you most often use. Using a new preference in the *Personal Preferences* dialog box (select **Setup; Preferences** and choose **Transactions: Settings**), you can now specify a payment type as the default for new payments.

Transactions: Settings

A/R Transactions

Default payment type

Choose the payment type to use on new payments.

Although new payments will use this payment type, you can change it at any time on individual payments.

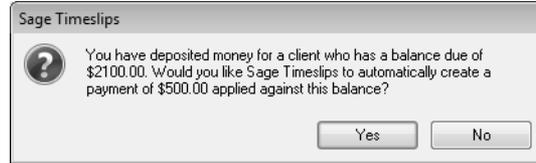


For more information on choosing a default payment type, look up “**Personal Preferences dialog box: Transaction Settings**” in the Sage Timeslips Help index.

Automatic prompting to create new payments

If you use client funds accounts to hold money for client, you can enter a *payment to account* or a *deposit to account* transaction to increase the funds account balance.

When entering these transactions, if the client has an outstanding balance, Timeslips will now prompt you to use that money in a new payment.



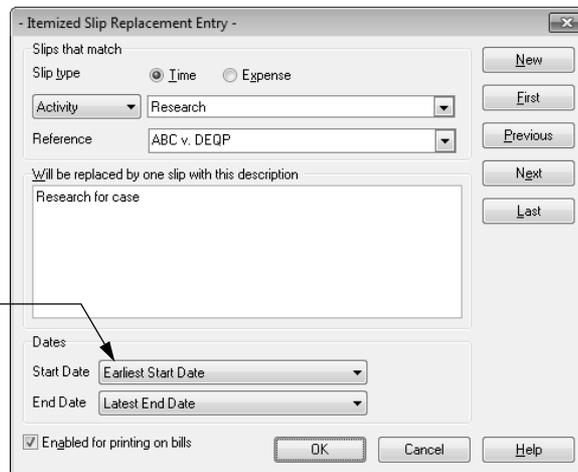
Help

For more information on entering funds transactions, look up “**entering funds transactions**” in the Sage Timeslips Help index.

Including Slips and Transactions on Bills

Formatting replacement slips

When using replacement slips on bills, you can now choose which dates will appear for the replacement slip. To open the *Itemized Slip Replacement Entry* dialog box, select **Slips; Replacement Slips** and then open a replacement slip.



You can now choose the format of *Start Date* and *End Date*.



Help

For more information on replacement slips, look up “**replacement slips**” in the Sage Timeslips Help index.

Omitting unapplied payments from bills

If you have some payments that include unapplied amounts, you can exclude those payments from displaying on bills, pre-bill worksheets, and Billing Assistant.

Unmark "Include payments with unapplied amounts" to omit them from the bill.

Limit Data	
<input checked="" type="checkbox"/> Show bills with balances but no activity	<input type="checkbox"/> A/R transactions obey the slip date range filter
<input checked="" type="checkbox"/> Show bills with funds activity only	<input checked="" type="checkbox"/> Include payments with unapplied amounts
<input checked="" type="checkbox"/> Include Clients who are paid in full	<input type="checkbox"/> Release slips marked hold
	<input type="checkbox"/> Draft Bill: Limit description to 4 lines



Help

For more information on report options, look up "report options" in the Sage Timeslips Help index.

Printing Bills

Suppressing hard copies of emailed bills

When printing bills and sending some bills by email, you can now suppress hard copies of the bills for clients receiving them by email.

This is useful if you do not need a hardcopy of emailed bills or if you simply want to save paper.

Unmark "Clients receiving emails print to printer" to prevent emailed bills from printing.

After printing	
<input checked="" type="checkbox"/> Send bills via email	<input type="checkbox"/> Print bill summary worksheet
<input checked="" type="checkbox"/> Clients receiving emails print to printer	<input type="checkbox"/> Print invoice number listing
<input checked="" type="checkbox"/> Print matching envelopes or labels	<input type="checkbox"/> Pause after bill to switch paper



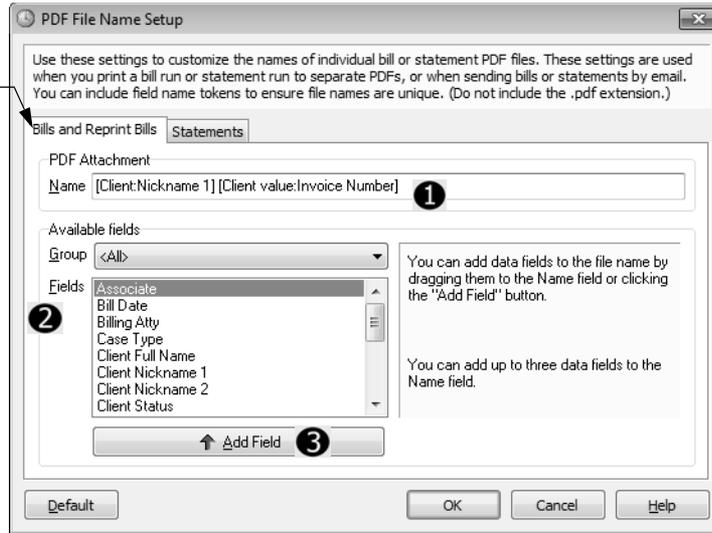
Help

For more information on emailing bills, look up "sending bills by email" in the Sage Timeslips Help index.

Automatically naming PDF files

When printing bills or statements to PDF, Timeslips can automatically name the individual PDF files using data field values.

You can set up PDF naming conventions for bills and statements.



In the *Name* field (1), you can enter a combination of free form text and data fields. Optionally, you can select a field from the *Fields* list (2) and click **Add Fields** (3) to add that field to the file name.



Help

For more information on PDF files, look up “**printing reports to PDF**” in the Sage Timeslips Help index.

Creating bill images

When printing bills to PDF, RTF, or TEXT file, if you approve those bills, Timeslips will save a bill image that you can reprint. In previous versions, you had to print to a printer in order for reprint images to be saved.

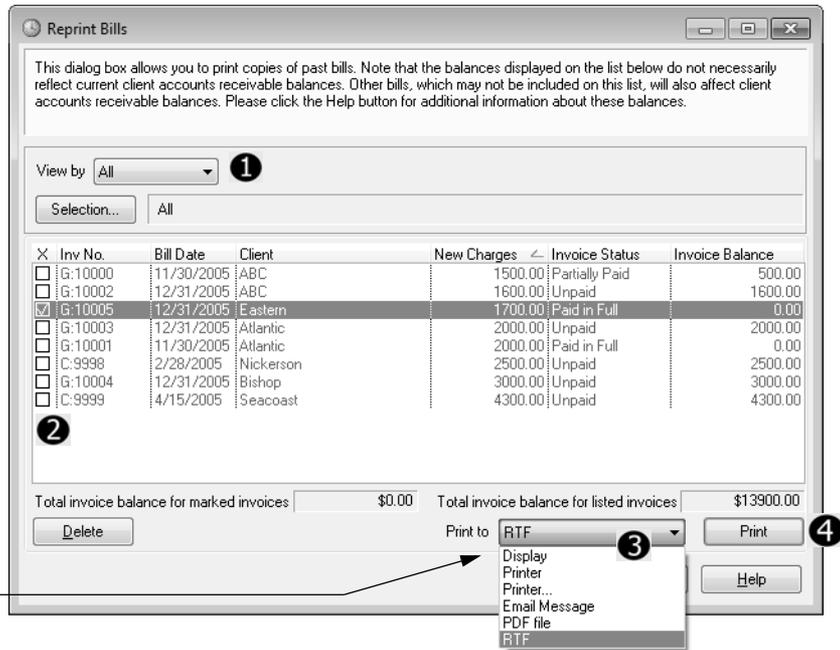


Help

For more information on bill images, look up “**reprinting bills**” in the Sage Timeslips Help index.

Reprinting bills

You can use the *Reprint Bills* dialog box (select **Bills; Reprint Bills**) to reprint past bills for your clients. When reprinting past bills, you can now reprint them to individual PDF files or to RTF format for editing.



You can now reprint bills to more formats.

Optionally, use the *View By* field and **Selection** button (1) to filter the invoices displayed. Mark (2) the invoices to reprint. Choose the destination of the reprint images. Click **Print** (4) to reprint the selected invoices.



Help

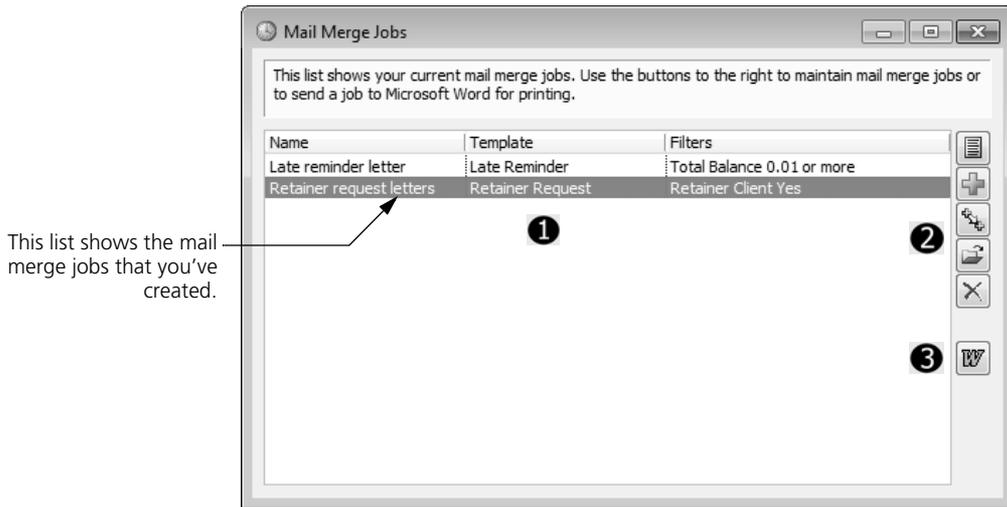
For more information on bill images, look up “reprinting bills” in the Sage Timeslips Help index.

Printing Reports

Mail merge

You can now merge client information into Word documents to create unique letters for your clients.

Select **Reports; Mail Merge** to open the *Mail Merge Jobs* dialog box.



This dialog box lists (1) the names of jobs, the mail merge templates each job uses, and the selection filters applied to each job.

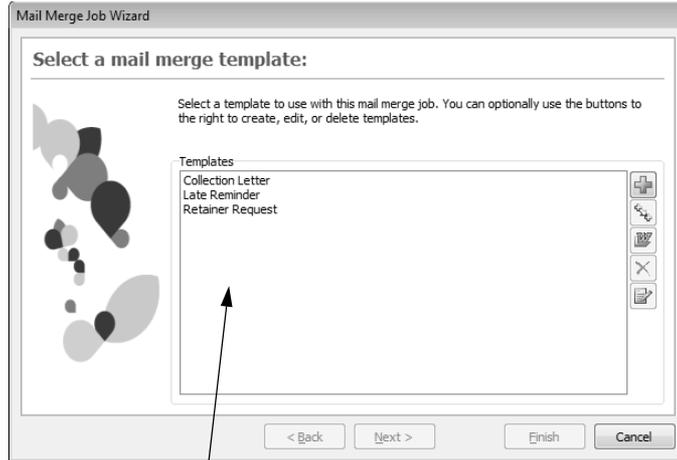
Use the toolbar to the right (2) to view the available mail merge templates, maintain mail merge jobs, or (3) send a mail merge job to Word.



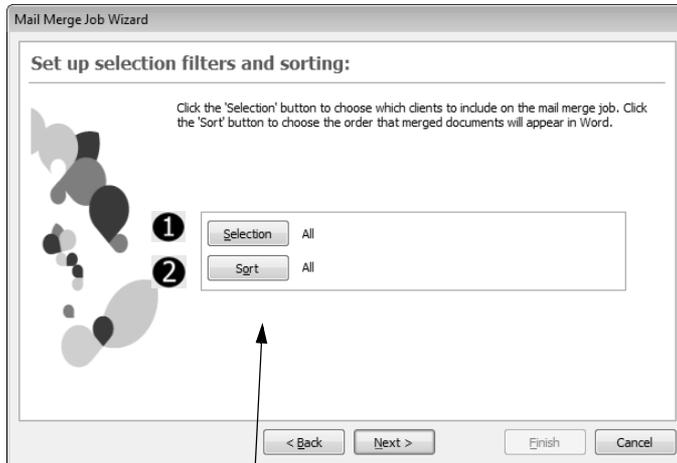
For more information on merging client information into Word documents, look up “mail merge” in the Sage Timeslips Help index.

Creating a new mail merge template

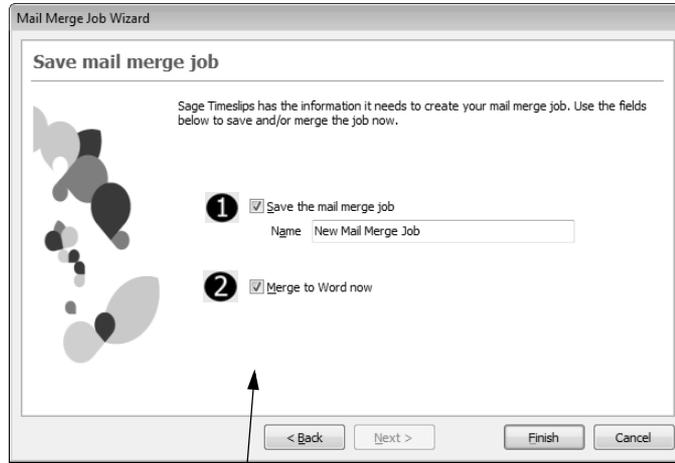
From the Mail Merge Jobs dialog box, click **New**  to create a new job.



Use the *Select a mail merge template* view to choose the template for the new job.



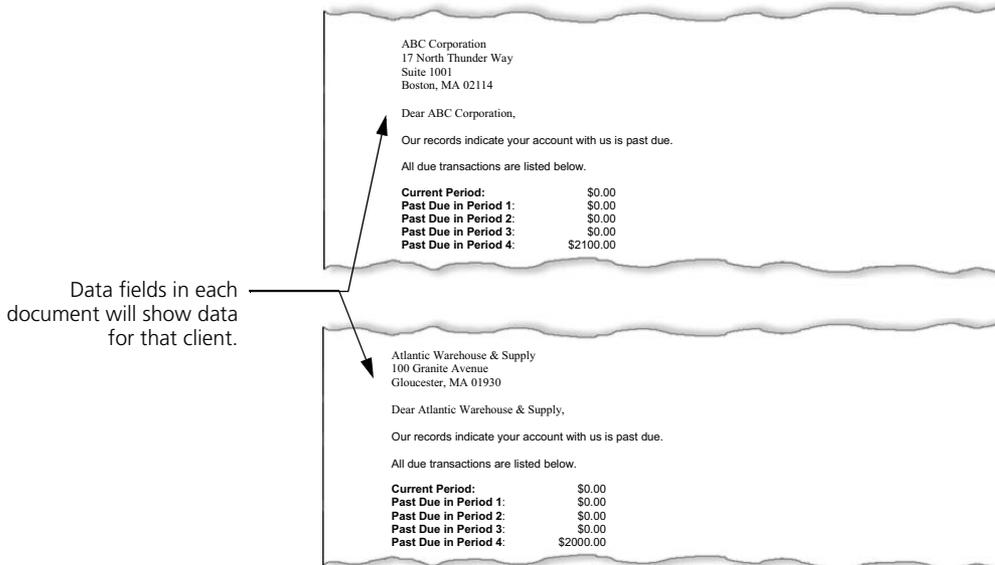
On the *Set up selection filters and sorting* view:
(1) click **Selection** to set up selection filters that will determine which clients are included, and (2) click **Sort** to determine the sort order of the mail merge letters.



Use the *Save mail merge job* view to (1) name and save the mail merge job for future use and (2) optionally run the mail merge job now.

Merging to Word

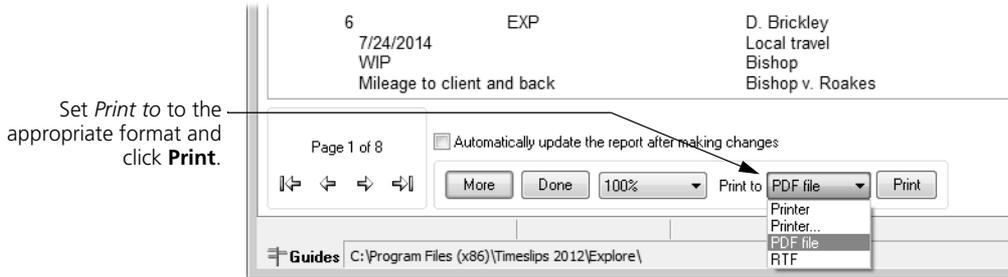
When you merge the mail merge job to Word, a separate document will print for each client included in the job.



Print format enhancements

Printing from preview

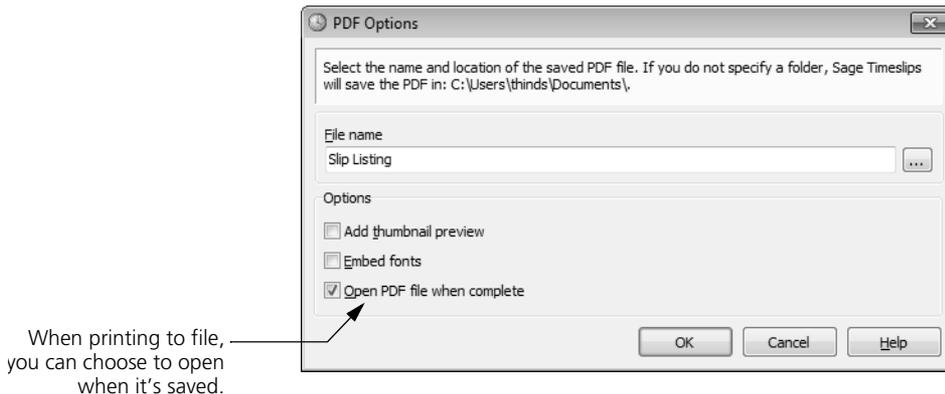
While previewing reports onscreen, you can now print them directly to printer, PDF, or RTF without having to generate the report again.



For more information on previewing reports, look up “**previewing reports**” in the Sage Timeslips Help index.

Automatically viewing files

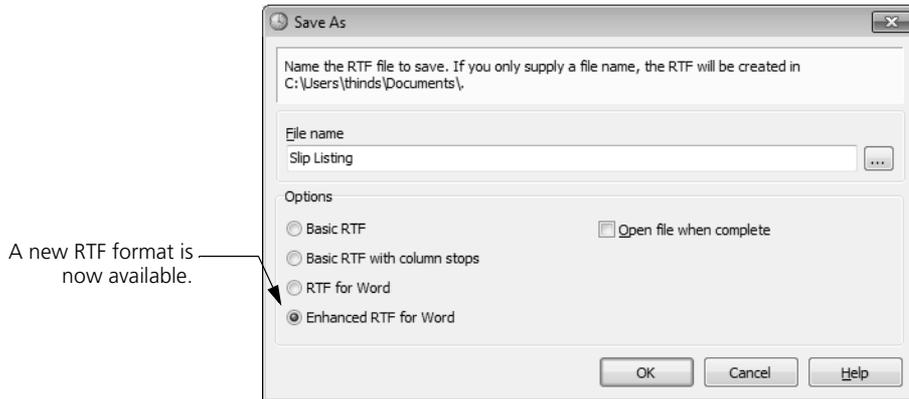
When printing reports to file (PDF, RTF, Text, CSV, TAB), Timeslips can now automatically open the file for you.



For more information on printing reports, look up “**printing reports**” in the Sage Timeslips Help index.

Enhanced RTF for Word

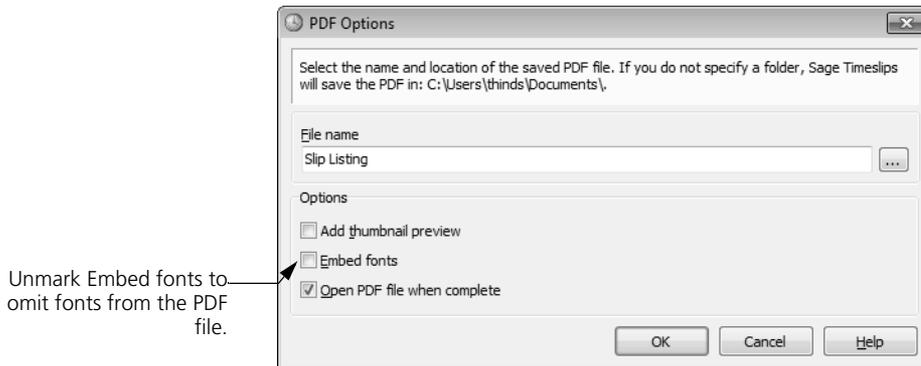
When printing reports to RTF, an additional RTF format is available: Enhanced RTF for Word. This RTF format resembles the report as it looks onscreen.



For more information on printing to RTF, look up “**printing reports to RTF**” in the Sage Timeslips Help index.

Omitting font information in PDF files

When printing reports to PDF, you can exclude font information to reduce the size of the PDF file.



For more information on printing to PDF, look up “**printing reports to PDF**” in the Sage Timeslips Help index.

Document Access

You can assign document folders and shortcut links to clients that allow you to quickly save and access documents for those clients.



For more information on document access, look up “accessing client documents” in the Sage Timeslips Help index.

Creating document folders for clients

You can use the *Document Locations* dialog box (select **Setup; Document Locations**) to help simplify the creation or assignment of document folders for each client.

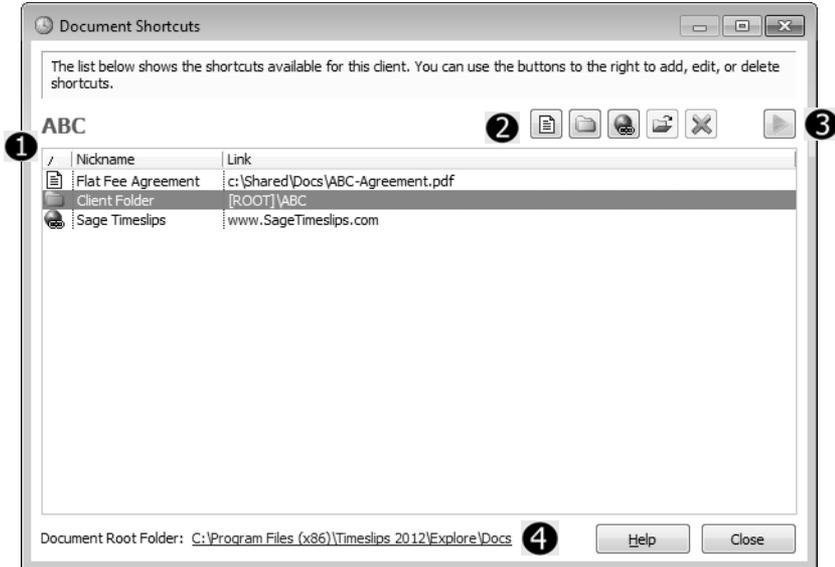
Client	Client Folder
* ABC	Use Nickname 1
Atlantic	Use Nickname 1
* Bishop	Use Nickname 1
Eastern	Use Nickname 1
* Nickerson	C:\Shared\Docs\Nickerson
* North.Project1	Use Nickname 1
* North.Project2	Use Nickname 1
Pierce	Use Nickname 1
Seacoast	C:\Shared\Docs\Seacoast

- 1) assign a *Root Folder* as a base that can contain document folders for each client
- 2) you can assign folder names based on the client's primary nickname or you can enter folder names manually.
- 3) an * will appear to the left of any folders that are missing
- 4) you can automatically create \Bills and \Statements subfolders within each client's document folder.
- 5) click **Create Folders** to create any missing document folders for your clients

Document and Folder Shortcuts

You can also set up or open shortcuts to non-Timeslips documents, folders, and web sites for each client.

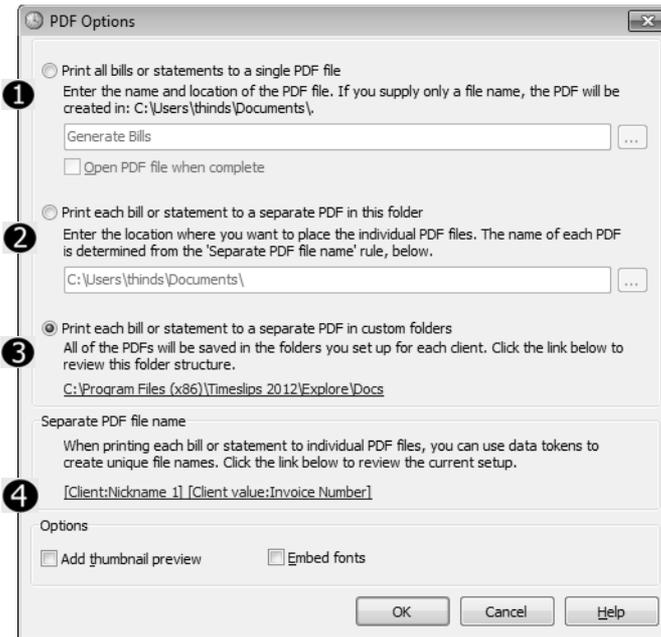
From the *Client List* dialog box or the *Client Information* dialog box, click **View Documents**  to open the *Document Shortcuts* dialog box.



- 1) For each client, you can maintain a unique list of shortcuts.
- 2) Use the tools at the top of the dialog box to create new shortcuts and maintain existing shortcuts. You can create shortcuts to specific documents, document folders, or web sites (URLs).
- 3) Double click any shortcut from the list to launch it or select a shortcut and click **Open**.
- 4) When you create new document or folder shortcuts, Timeslips will default to the *Document Root Folder*. You can click this link at the bottom of the dialog box to review your current Document Locations.

Creating PDFs for each client

When printing bills or statements to PDF, the *PDF Options* dialog box provides additional options:



You can (1) print the entire run to a single PDF file, you can (2) print individual PDF files for each client and place them in a specific folder, or you can (3) print individual PDF files for each client and place them in each client's document folder.

When printing separate PDF files for each client, Timeslips will use the naming rules (4) you have set up in the *PDF File Name Setup* dialog box.

TAL and TAL Pro

Manually marking transactions as posted

When you link Timeslips with a general ledger, there may be transactions that you do not transfer from Timeslips to that general ledger.

You can now use the *Mark Transactions As Posted* dialog box (select **Setup; Mark Transactions As Posted**) to mark these transactions so they do not transfer to your general ledger.

This list shows the transactions that match your selections on the previous page. Use the check boxes below to further limit which transactions to mark as Posted.

X	Table	ID	/ Date	Type	Client	Amount
<input type="checkbox"/>	A/R	1	2/26/2013	INV	Nickerson	2500.00
<input type="checkbox"/>	A/R	2	4/13/2013	INV	Seacoast	4300.00
<input checked="" type="checkbox"/>	A/R	3	10/30/2013	INV	ABC	2000.00
<input type="checkbox"/>	A/R	4	11/16/2013	PAY	Atlantic	(2000.00)
<input type="checkbox"/>	A/R	5	11/28/2013	INV	ABC	1500.00
<input type="checkbox"/>	A/R	6	11/28/2013	INV	Atlantic	2000.00
<input checked="" type="checkbox"/>	Funds	1	12/13/2013	DEP	Eastern	10000.00
<input type="checkbox"/>	A/R	7	12/28/2013	PAY	ABC	(3000.00)
<input checked="" type="checkbox"/>	Funds	2	12/29/2013	PAYF	Eastern	(1700.00)
<input type="checkbox"/>	A/R	8	12/29/2013	INV	ABC	1600.00
<input type="checkbox"/>	A/R	9	12/29/2013	INV	Atlantic	2000.00
<input type="checkbox"/>	A/R	10	12/29/2013	INV	Bishop	3000.00
<input type="checkbox"/>	A/R	11	12/29/2013	INV	Eastern	1700.00
<input type="checkbox"/>	A/R	12	12/29/2013	PAY	Eastern	(1700.00)

Choose the transactions that you want to mark as posted.



Help

For more information on marking transactions as posted, look up “**Mark Transactions as Posted dialog box**” in the Sage Timeslips Help index.

Status of name synchronization

If you connect Timeslips with Peachtree or QuickBooks and you synchronize names, Timeslips now provides enhanced log files that indicate the status of name synchronization.

Reviewing documentation

If you connect Timeslips with Peachtree or QuickBooks, you can now quickly access documentation in PDF format through the **Help; Other Documents** menu.

Enhanced Navigators

When using enhanced navigators in a multiuser environment, the *Use Navigators Locally* setting allows users to maintain their own templates so changes do not affect other users.

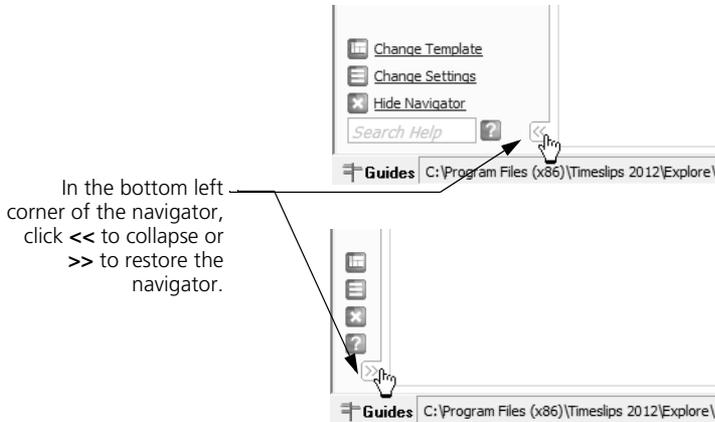


Help

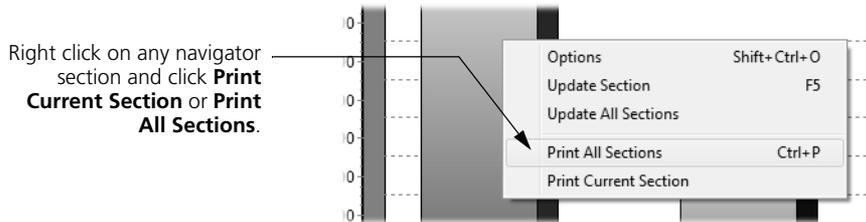
For more information on using a local copy of the navigator, look up “Personal Preferences dialog box: Navigators page” in the Sage Timeslips Help index.

When viewing enhanced navigators:

- you can collapse the options on the left-side to provide more room



- you can double-click on any section heading to view the section in full-screen mode. This is be useful when viewing long lists of data or detailed graphs.
- you can right-click on any section to print that section or all sections



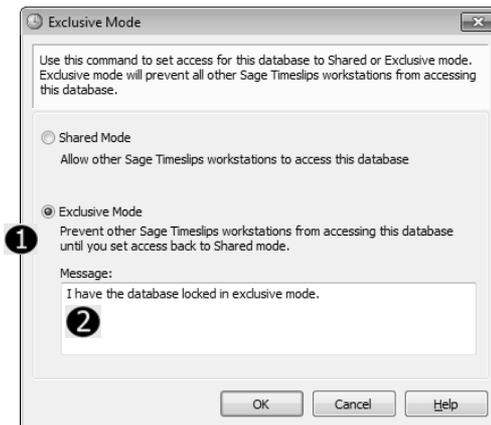
Help

For more information on using enhanced navigators, look up “enhanced navigators” in the Sage Timeslips Help index.

Administration / Network / System

Setting Exclusive Mode

You can now use the *Exclusive Mode* dialog box (select **Special; Exclusive Mode**) to temporarily prevent access by other timekeepers. This is useful, for example, if you want to print bills or reports, and do not want additional records entered while you verify values.



Choose **Exclusive Mode** (1) to lock the current database. Optionally enter a message (2) that other timekeepers will see when they try to access the database.



Help

For more information on using enhanced navigators, look up “exclusive mode” in the Sage Timeslips Help index.

Reviewing other users

You can now use the *About Sage Timeslips* dialog box (select **Help; About**) to view details about other workstations that are accessing the Timeslips database.

At the bottom of the *About Sage Timeslips* dialog box, click **View Station Access**.

Click **View Station Access** to view information about other workstations that are accessing the database.



Help

For more information on the view station access, look up “**About Sage Timeslips dialog box**” in the Sage Timeslips Help index.

Log Files

You can now access Timeslips-related log files quickly using the new **Special; Explore Log Files** command