

TIMESLIPS PREFERENCES

From the main menu, click SETUP ... PREFERENCES.

There are multiple pages and is critical when configuring how each individual user wishes to view and interact with the various menus and screens.

Each user should maintain their own preference file. This can be done either by saving each user's preference file to a location on the server, or saving each preference file on the user's local hard drive. Click "Save As" at the bottom of the screen and save the file (ends in .prf) in your firm's preferred location.

IMPORTANT: EACH USER NEEDS THEIR OWN SAVED PREFERENCE FILE.

Setup ... Preferences: Initial dialog box

Personal Preferences [C:\Program Files (x86)\Timeslips\Timeslips 2016\PREFS.PRF]				
Interface Startup and Exit	Interface: Startup and Exit			
Navigation Rules	Show at startup			
Menu and Commands	Confirm today's date for accurate aged balances			
Appearance	Splash screen			
Navigators				
Procedures	Maximize main window	Yes 🔻		
Slips	Navigator	Yes Classic (Advanced, Undocked window)		
Options				
Slip List	Sage Timeslips <u>T</u> oday	As last used v (will automatically dock the classic navigator)		
Slip Entry	Calendar	No		
New Slip Rules				
Transactions	Open <u>w</u> indow	None		
New Transaction Rules	Also open window	None		
Billing				
Billing Assistant Options	Exit			
Billing Assistant Buttons	Confirm when closing (Confirm when dosing (except with File; Exit)		
Client	Back up the database			
Spelling/Grammar Other	On Open/Close Database			
other	Remind me if a backup has not been made in 5 v days			
	Default Save As Retrieve OK Cancel Help			

Interface Section:

- Startup and Exit: Preferences for this station starting Timeslips, including start-up mode for Timeslips Today. It might be preferable to set "Timeslips Today" to never if the program has delays when starting up.
- Navigation Rules:
 - Saving Rules: Define how Timeslips should behave when closing or switching to another window. These rules may or may not be followed when a supervisor closes the user out of Timeslips (based on security settings). See security section for more information.
 - Field Navigation: Will "enter" move the cursor to the next field? Where does the cursor go when moving into a multi-line text field?



• Recommended settings:

Interface: Navigation Rules	
Saving Rules Set up rules on how Sage Timeslips should behave when leaving a record that is currently being edited.	
Prompt to save when moving between records on a data entry window Saye when closing or switching Reports No Prompt to update rates when saving new rates	
Field Navigation Set up rules on how Sage Timeslips should behave when moving through fields. Use the Enter key to move between fields on entry dialog boxes On multi-line text fields, use Ctrl-Enter for a new line When moving into a multi-line text field Itel Sage Timeslips select the best option	

- Menu and Commands: Recommend that all menu commands show "List"
- Appearance: This screen is used to reset all messages to show, to set all messages to NOT show, or to "restore all dialog boxes to their defaults".

HINT: THE RESTORE ALL DIALOG BOXES IS A VERY USEFUL COMMAND IF WINDOWS OR TOOLBARS DISAPPEAR

- Navigators: Choose your preferred navigator type and specific template; It is recommended that you check the box "Use Navigators Locally"; Specify whether or not you wish to see "Hints" from Billing Assistant
- Procedures: This dialog box is used if a firm implements custom navigators. Custom automated procedures would need to be written to accommodate the customized navigator.



Slips Section:

• Options allows you to show both nicknames, run multiple timers simultaneously and specify how many modified slips can be tracked. This section also enables users to show time in decimal format or hours:minutes format. It is recommended that the "Paste descriptions as plain text" box be checked.

Interface	Slips: Options		
Startup and Exit			
Navigation Rules	Slip Options		
Menu and Commands	Minimize command on the main Sage Timeslips window switches to Mini Slip View		
Appearance	Switches to the Mini Slip View of the Slip Entry dialog box when you click the minimize button in the top right corner. Otherwise, the minimize button would simply minimize the window.		
Navigators			
Procedures	Show both nicknames simultaneously Shows the primary and secondary nicknames for Timekeepers, Tasks, Expenses, and Clients.		
Slips	brows are printing and secondary methanics for nimencepersy rasks, expenses, and cherrest		
Options \min	Show time in slips as decimal		
Slip List	Shows Time spent, Time estimated, and Do Not Bill time in HH.DD format instead of HH:MM:SS		
Slip Entry	format in Slip Entry and Slip List.		
New Slip Rules	Paste descriptions as plain text		
Transactions	Permit multiple timers simultaneously running on this station		
New Transaction Rules			
Billing	Slip Tracking		
Billing Assistant Options	Number of recently modified slips tracked 100		
Billing Assistant Buttons	Number of recently timed slips tracked 8		
Client			
Spelling/Grammar			
Other			
	Default Save As Retrieve OK Cancel Help		



• Slip List: Specify which slips should appear when opening the slip list; Whether to show hidden slips as "Hidden" or to hide them (slips hidden due to security), and whether or not to automatically update the slips list when generating bills or editing slips (can be time consuming).

Interface			
,,	Slips: Slip List		
Startup and Exit			
Navigation Rules			
Menu and Commands	When opening the slip list		
Appearance	Select the first slip in the list		
Navigators	 Select the last slip in the list 		
Procedures	Remember the last selected slip		
Slips	Remember the selected tab		
Options			
Slip List 🛛 🔿			
Slip Entry	If security is set that does not allow you to view slips of other timekeepers then		
New Slip Rules	Obow "Hidden due to security label" for each slip that you cannot see		
Transactions	Hide any slips that you cannot view		
New Transaction Rules			
Billing	Automatically update the slip list when generating bills or editing slips.		
Billing Assistant Options			
Billing Assistant Buttons			
Client			
Spelling/Grammar			
Other			

• Slip Entry: Specify if the order of fields should be Client/Task or Task/Client. Specify the field order when "tabbing" through a slip's fields. Move fields up and down based on your firm's needs, and where the toolbar is docked.

2	Slips: Slip Entry	/			
_	Customize				
	Field order in Slip Entry	Client Trade	_]		
	Eleid order in Silp End y	Client/Task	•		
	Dock toolbar to the	Right	•		
Ļ					
1.	Tab Order				
	The following list show the				
	determines the tab order as Ctrl, Shift, or Alt, by ty			ys, you can use spe	cial keys such
	as cur, shirt, or Ait, by ty	yping in the nam	e of the key.		
	Field Name		Hot Key	Jump	Move To Top
	Slip Type			· · · ·	Move Up
	Timekeeper				
	Client				Move Down
	Activity				Move To End
	Reference				
	Custom				
	Description				
	Start Date				
	End Date				
	Time Spent				
	Timer Switch				
	Quantity				
	Price Level				
	Price			· ·	Reset



• New Slip Rules:

Indicate whether a new slip should use the logged in timekeeper, copy the timekeeper from the prior slip or choose from the open list.

Choose which fields get copied from the prior slip and whether a timer is started for each new slip. Regarding the "Copy Slip Fields" options, copy dates will copy the dates from the prior slip and will not pick up "today".

NOTE: If "copy dates" is checked, slips will default to the last date used and will not default to current date when entering new time.

Slips: New Slip Rules			
Default Values			
Create new slips for the logged in Tir	Create new slips for the logged in Timekeeper		
Pull data from open dialogs when created and the second	Pull data from open dialogs when creating new slips		
Copy Slip Fields			
The options below can speed up the slip entry process by copying certain fields from the previous slip. Mark the fields that you want to copy to new slips.			
Timekeeper	▼ Type of Slip		
Client	Task 📃		
Reference	Expense		
Dates	Extra		
Slip Timer			
Start timer when creating a new time slip			

Transactions Section:

• New Transaction Rules: Settings shows the system default for a new transaction (what to copy from the prior transaction) and default payment type (most common option is "check").



Billing Section:

Billing Assistant Options: Recommend that you set this to "Single client at a time"
 Personal Preferences [C:\Program Files (x86)\Timeslips\Timeslips 2016\PREFS.PRF]

Interface	Billing: Billing Assistant Ontions		
Startup and Exit	Billing: Billing Assistant Options		
Navigation Rules			
Menu and Commands	Specifies the default view of Billing Assistant.		
Appearance			
Navigators	The list view allows you to see a snapshot of all your clients that are ready to bill according to		
Procedures	a rule you define. The rule you select will determine which clients are shown in the Ready-to-Bill list.		
Slips	Ready-to-bill list.		
Options	Single client at a time		
Slip List	The single client view allows you to view an overview of billing information one client at a time.		
Slip Entry			
New Slip Rules	C As less used		
Transactions	 As last used Sage Timeslips remembers how you last viewed Billing Assistant. 		
New Transaction Rules	Sage Timesips remembers now you last viewed billing Assistant.		
Billing			
Billing Assistant Options 🗪			
Billing Assistant Buttons			
Client			
Spelling/Grammar			
Other			
	Default Save As Retrieve OK Cancel Help		

- Billing Assistant Buttons: Define which buttons activate which procedure
- Client: This screen allows a user to see whether or not the client has a full bill hold on his account from the main client list

Spelling/Grammar Section:

• General: How do you want the system to notify you of errors? Do you want to check as you go, or run an overall spell check prior to generating bills.

• Spelling Dictionaries: There are options of up to 6 dictionaries that can be selected from for spell check, including a technical dictionary; View and edit your own personal dictionary from this window also.

- Spelling Options: Define specifics for spell check
- Grammar Options: Define settings and writing style for grammar checking
- Performance: What is preferred for spell check: Speed or accuracy?

Other Section:

- Calendar Settings: Define default view and interval to check for reminders
- Alerts: Specifies whether to hide or show alerts and how the alert will appear.
- Database paths:
 - Database Location Specifies the default Timeslips database folders.
 - Backup and Restore Specifies the default folder where Timeslips saves database backups



- Report paths Section:
 - Print reports to file Specifies the default folder where Timeslips saves reports to file. You save a report to file when Print to is set to Text file, File comma delimited, or File tab delimited on the <u>Report List dialog box</u> or the <u>Report Entry dialog box</u>. Enter the folder name or click Browse to search for the folder
 - Imported and exported files Specifies the default folder where Timeslips saves files that you export. You export data from the <u>Export Template List dialog box</u>. Enter the folder name or click Browse to search for the folder.
 - Report templates Specifies the default folder where Timeslips looks for report templates. You can specify the report template to use in the <u>Report Options</u> <u>dialog box</u>. Enter the folder name or click Browse to search for the folder
- Other paths Section: Specify where the Timeslips "temp" files will be saved and where audit house files are saved (if your firm uses electronic billing).

After updating preferences, click the "save as..." button; save preferences to a file (c;\program files\timeslips\prefs.prf) on the user's local ("c") drive.

***It is recommended that each workstation have their own preference file saved on their "C" drive. Sharing preference files can be problematic.