

## TIMESLIPS PREFERENCES

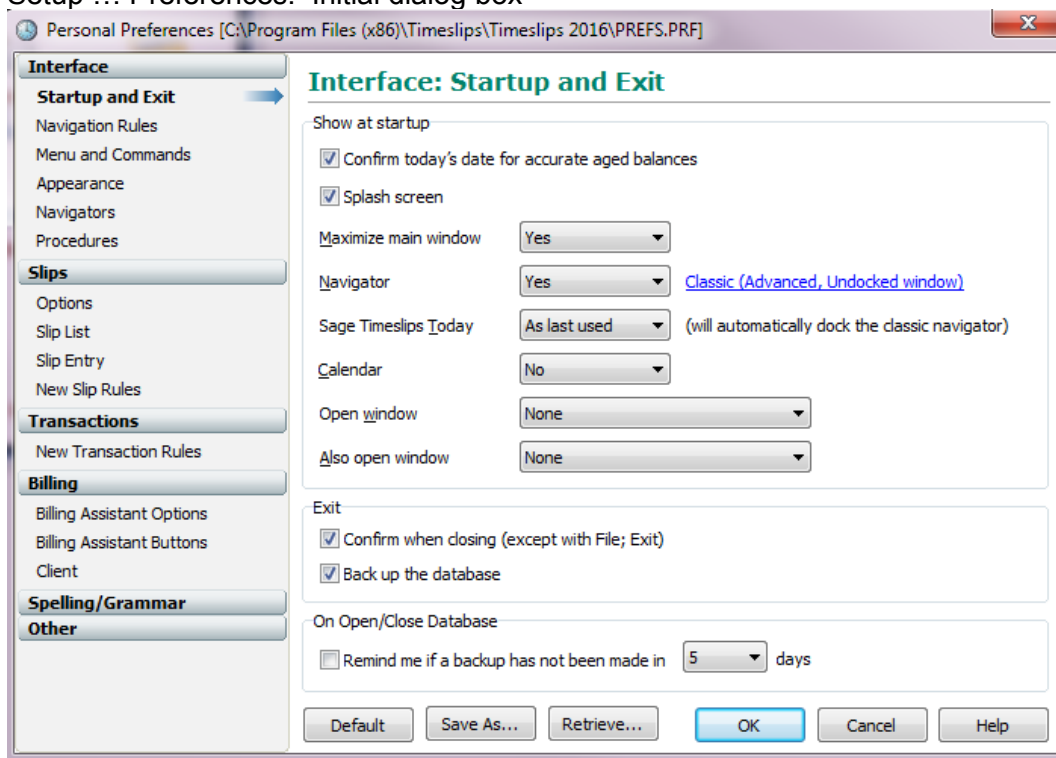
**From the main menu, click SETUP ... PREFERENCES.**

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



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 closing a data entry window

Prompt to save when moving between records on a data entry window

Save 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 let Sage Timeslips select the best option

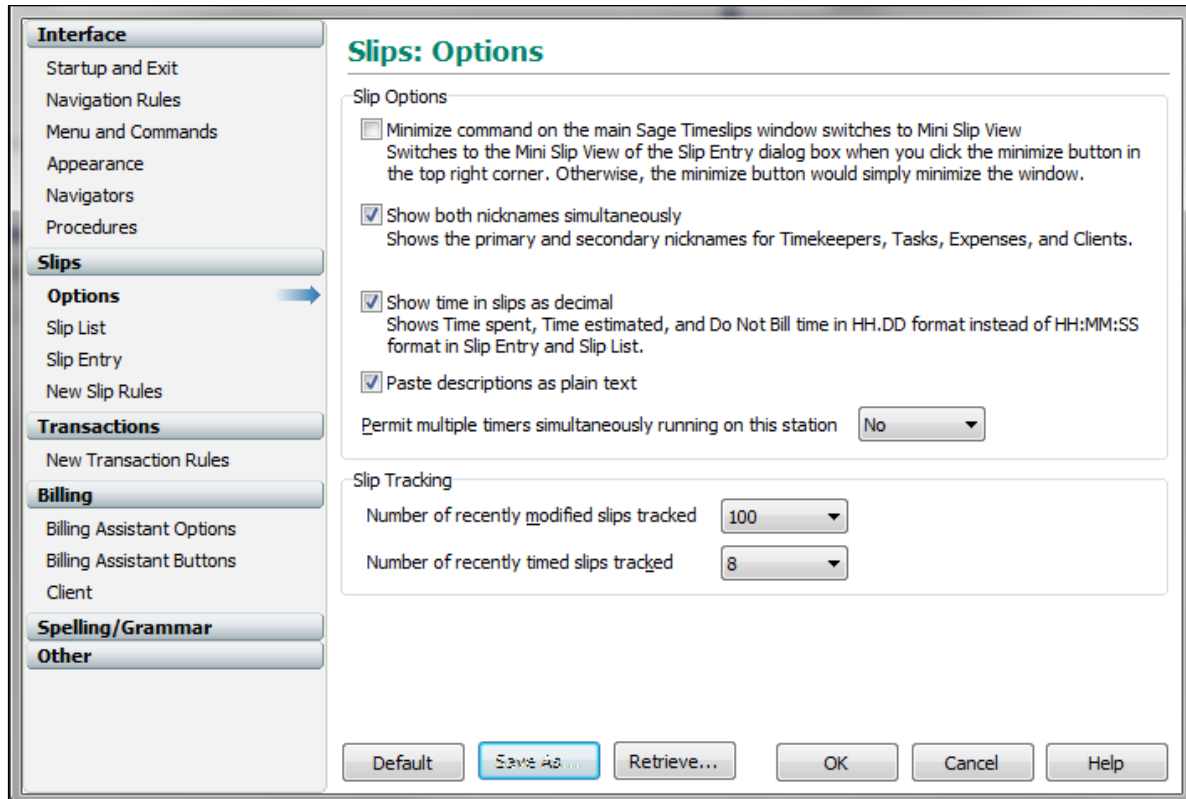
- Menu and Commands: Recommend that all menu commands show “List”
- Appearance: This screen is used to reset all messages to show, to set all messages to NOT show, or to “restore all dialog boxes to their defaults”.

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

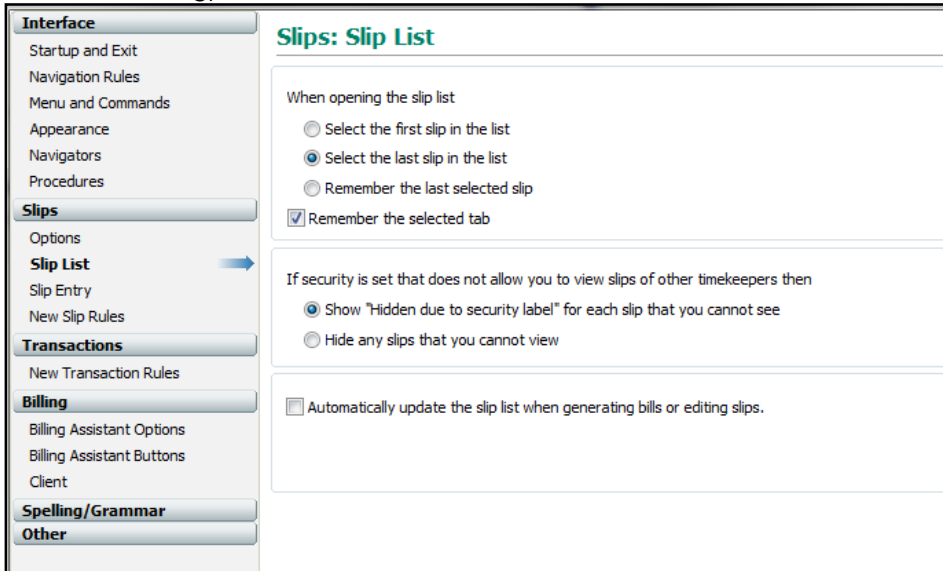
- Navigators: Choose your preferred navigator type and specific template; It is recommended that you check the box “Use Navigators Locally”; Specify whether or not you wish to see “Hints” from Billing Assistant
- Procedures: This dialog box is used if a firm implements custom navigators. Custom automated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

Slips Section:

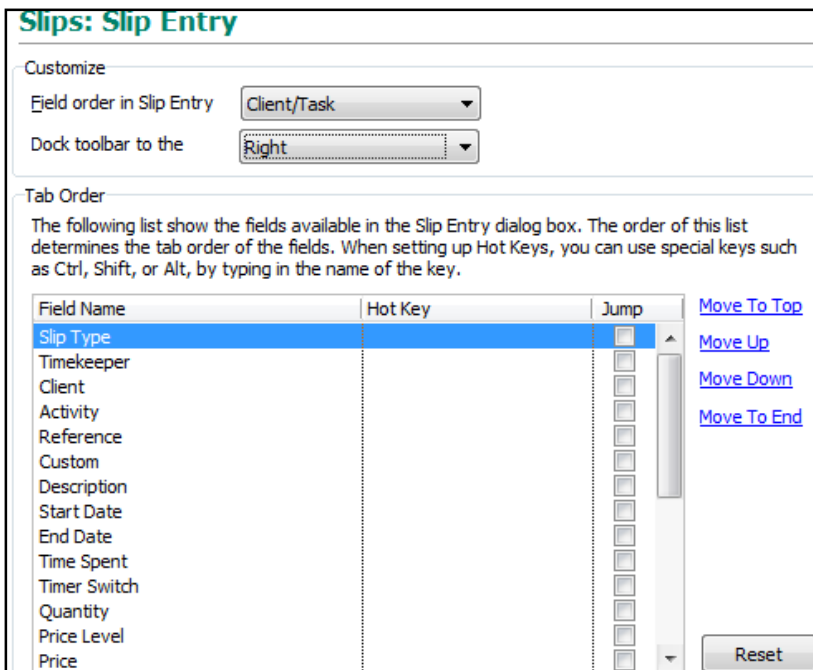
- Options allows you to show both nicknames, run multiple timers simultaneously and specify how many modified slips can be tracked. This section also enables users to show time in decimal format or hours:minutes format. It is recommended that the “Paste descriptions as plain text” box be checked.



- 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).



- 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.



- 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

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Default Values

Create new slips for the logged in Timekeeper

Pull data from open dialogs when creating new slips

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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.

<input checked="" type="checkbox"/> Timekeeper	<input checked="" type="checkbox"/> Type of Slip
<input type="checkbox"/> Client	<input type="checkbox"/> Task
<input type="checkbox"/> Reference	<input type="checkbox"/> Expense
<input type="checkbox"/> Dates	<input type="checkbox"/> Extra

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Slip Timer

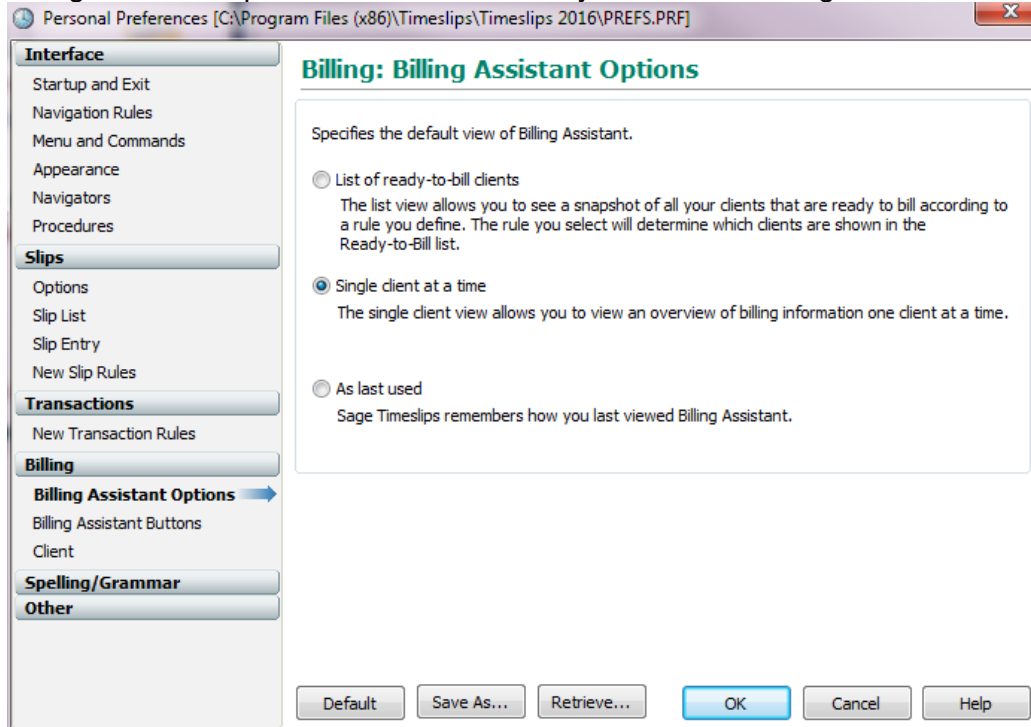
Start timer when creating a new time slip

#### 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”



- 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 Report List dialog box or the Report Entry dialog box. 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 Export Template List dialog box. 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 Report Options dialog box. 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.**