TSR

TIMESLIPS PREFERENCES

From the main menu, click SETUP … PREFERENCES
There are multiple pages to the Timeslips Preferences feature which affect how the program displays various features and screens for each individual user.

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 Page:
- 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
- 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 only 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; 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 Page:
- Options allows you to show both nicknames, run multiple timers simultaneously and specify how many modified slips can be tracked.

- New Slip Rules: What fields get copied when adding a new slip? Should a timer be started for each new slip?
  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.
- Movement Rules: What is the field order when "tabbing" through a slip's fields? Move fields up and down based on what fields your firm uses

Transactions Page:
- Settings shows the system default for a new payment

Billing Page:
- Billing Assistant Options: Recommend that you set this to "Single client at a time"
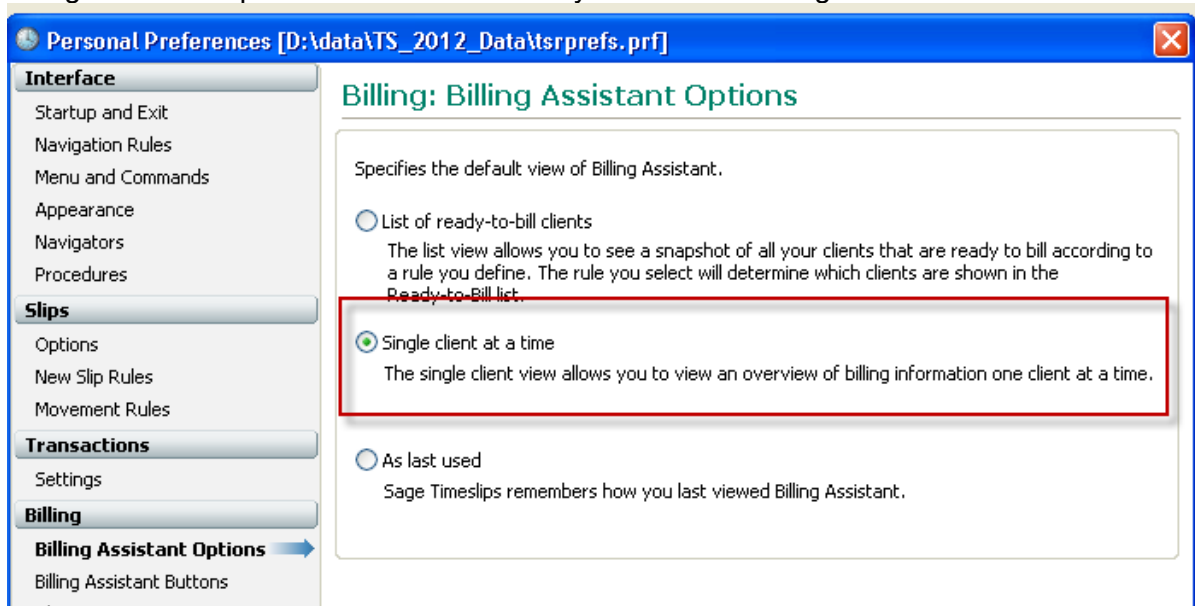
- Billing Assistant Buttons: Define which buttons activate which procedure
- Client: This screen allows a user to see whether or not the client has a full bill hold on his account from the main client list

Spelling/Grammar Page:
- 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; You can also view and edit your own personal dictionary from this window.
- Spelling Options and Grammar Options: When you run spell check or grammar check, what types of entries and which fields are looked at?
- Grammar Options: Define settings and writing style to be used when scanning for spelling or grammar errors.
- Performance: What is preferred for spell check: Speed or accuracy?

Other Page:
- Alerts: Specifies whether to hide or show alerts and how the alert will appear.
- Database paths: Database Location – Specifies the default folder where Timeslips browses for database folders.
- Backup and Restore – Specifies the default folder where Timeslips expects to save database backups or expects to restore database backups.
- Report paths:
  - 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
  - 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 dialog box</u>. Enter the folder name or click Browse to search for the folder
- Other paths: Specify where the Timeslips "temp" files will be saved

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.**