New Features in Timeslips 2015

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.

The **Firm: Address Information** page holds contact information for your firm. This page contains new fields that can store the firm's email address, web site URL, and additional custom information.

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

Working with Clients

The following enhancements affect 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.

Additional Fields for Secondary Address

On the **Client Information** dialog box, the **Contact Info** page now contains additional fields for a second address.

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

After additional addresses are entered for clients, you can display them on some reports using options in the **Report Options** dialog box.

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. This system works with the existing My Lists system that you can set up for timekeepers.

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 on the **Activities** page of **Client Information** for client Atlantic.

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

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.

Working with Transactions

The following enhancements affect transactions:

Generating Receipts for Payments

You can now 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.

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.

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

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

Sage Timeslips will track when a receipt is printed or sent by email. You can view this information for your payments using the Accounts Receivable Receipt Listing.

Working with Bills

The following enhancements affect the bill 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.

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

Sage Timeslips offers an add-on which can save billing information to file for electronic submission to firms like LEDES, LegalGard, or TyMextrix. Several enhancements have been included to make this process easier and offer you more information on electronic bills.

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.

Working with TimeCapture

The following enhancements affect the 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. 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.

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.

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 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.
- You can click Import to import all rules from a file.

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.

- 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.
- Choose Create Slip.
- TimeCapture will verify that you want to convert the entry. Click Yes to send the entry to Sage Timeslips.

Working with Speech Recognition

The following enhancements affect the Windows 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 following enhancements affect conflict search and text search:

- 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.
- Search results are now sortable. Click on any column heading to sort the list. Click on any result to see the context below.