

TIMESLIPS UPGRADES: CHANGES BY VERSION

FEATURE AND INTERFACE CHANGES: TIMESLIPS 2006:

SLIP ENHANCEMENTS:

Enhanced Slip Find

From an individual slip, click the magnifying glass icon (3rd from bottom) to activate the dialogue box to filter the slip list.

Sort by Column Titles

From a list (clients, slips, transactions), click the column title to change the sort. Previous versions changed the sort from nickname 1 to 2 by right-clicking. Sorting by column title is more intuitive.

REPORTS:

Updated Report List

From the Report List, a sample preview appears on the left along with a summary of how the report is used.

Interactive Reports

When printing a report to display, it is now possible to click on an entry to open that entry. For example, in a slip list report, clicking on the slip information will open the slip record to allow edits to the slip. If the "automatically update the report" option is clicked, the report will automatically update.

Intuitive Report Design Tool

The new report design tool allows users to make changes and create new reports more easily. Use the "Design report" icon (a triangle in a box on the lower right of the screen) to set up a report.

Print Reports to Excel

Reports can be printed to display, printer, PDF file and now to Excel.

Sort Reports by Value

Some reports have a new sort key to sort by value. For example, it is possible to sort aged a/r balances by total balance. Click the SORT tab to see the various options.

Improved Report Wizards

New report wizards have made it easier to create new reports, copy existing reports and locate pre-configured reports.

BILLS AND BILLING:

Print Bills on Pre-Printed Forms

It is possible to print bills on pre-printed forms if a customized bill layout is not desired. Forms are available from www.timeslips.com/forms.

Bill Design Options:

Show Total Hours: Omits details for each slip but shows total of all hours

How Estimated Time: Displays the "Estimated Time" field on the bill

Show discount information: Can be added to the bill layout

REPRINT BILLS:

Reprint Unpaid Bills

From the BILLS ... REPRINT BILLS dialogue it is possible to only print bills not paid in full. This new field shows the status of each invoice (unpaid/paid in full or partially paid).

Reprint Bills to Email

It is now possible to reprint bills directly to email. The "print to" dialogue box now provides that as an option.

ALERTS:

Name-Specific Alerts

The "Alerts" feature has been enhanced to allow notification based on the client or timekeeper selected, rather than globally.

SYSTEM ENHANCEMENTS:

Smart Configure

Timeslips will detect and notify users of features that are available but not being used. To turn this off for users, click SETUP ... FEATURES ENABLED and turn off this notification.

CC E-mail Addresses

Timeslips has been able to send bills via email, but with Timeslips 2006, users can now send a copy to another party via email.

FEATURE AND INTERFACE CHANGES: TIMESLIPS 2007

Receiving Slips by Email

Timekeepers can send email messages which will be converted into time or expense slips. The system must first be set up to accept email messages (Setup – Receive Slips by Email). Message filtering and message processing options must be defined.

Approving Slips for Billing

The Slip Approval feature is a formal process where designated individuals must approve slips before they can appear on a bill. Slips can have a status of pending approval, approved or rejected from billing.

Slip Notes

Notes can be added to slips; these notes do not appear on bills or reports, but is useful when communicating with the billing administrator or other timekeepers. Slip notes are particularly useful with the Slip Approval feature.

Cover Pages with Bills

There is now a section of the bill where a customized cover letter can be set up. Information such as balance due, date of bill and other information can be included in cover pages.

Automatic Backup

Timeslips can run automatic backups when all users are logged out of the system. Click "File" ... "Schedule Backups" to review the options.

Grammar Check with Spell Check

Timeslips users have the option of checking for spelling errors and, now, for grammar errors. Spell check errors appear in red and grammar errors appear in green. Slip list report shows errors on display; can spell check when saving slip.

Timeslips Today:

Timeslips Today can include sections previously not available, such as unsuccessful backup notification, alerts, top five reports, and more. It is also possible to now print Timeslips Today (right-click on Timeslips Today and choose "print all" or "print current" sections).

Enhanced Navigators

Classic navigators function as they always have, but there is now the ability to utilize enhanced navigators, which are customizable.

TAL Pro for QuickBooks changes

New options include not showing error message that QB Data is not available (for users who do not have access to the QuickBooks program and data). Another enhancement is the ability to print a report of all the links between Timeslips and QuickBooks.

Enhanced Selection Filters

Two new filters are added:

- (1) Slip Source (slips received by a specific timekeeper or eCenter)
- (2) Logged-in Timekeeper filter allows you to select slips based on who was logged in to the computer where the slips are added.

In addition, all features added to earlier versions are included in Timeslips 2007.

TIMESLIPS UPGRADES: CHANGES BY VERSION

FEATURE AND INTERFACE CHANGES: TIMESLIPS 2008

Billing Assistant

Billing Assistant provides two views. You will typically use the List View., which allows you to review billing data for all clients at once. However, you can use Single Client View if you have a large database that may take longer to update. You can set preferences (SETUP ... PREFERENCES ... BILLING ASSISTANT tab) for your workstation to indicate which view you want to use as your default.

The List View of Billing Assistant shows which clients are ready for billing. You can set up your own billing rule that chooses clients for you by clicking the Change Billing Rule button at the top of Billing Assistant; then choose a basic rule from the list.

Removing Items from Previewed Bills

When previewing bills onscreen, you might find items that you should have excluded from the current bills. Timeslips now provides the tool (scissors icon in bill preview) to remove items from the bill run. Click the arrow icon at the bottom of the list to return to the normal view and edit mode. There is also an option to remove an entire bill from the bill run (at the bottom of the screen).

Automatically Printing Envelopes or Labels

After you print a bill run or statement run, Timeslips can now automatically print matching envelopes or labels for those clients (option button in Generate Bills).

User-Defined Transaction Reports

You can now create your own custom reports from accounts receivable transactions and client funds transactions. This allows you to design concise reports that include only the information that you need.

Improved Timeslips Collections Report

Timeslips now provides a timekeeper filter for Timekeeper Collections reports that allows you to limit which timekeepers appear.

Restoring Backups

When restoring a database backup, you may not want to overwrite your current database until you know the state of the data in the backup. Timeslips now provides an easy way to restore a backup into a new database folder.

FEATURE AND INTERFACE CHANGES: TIMESLIPS 2009

Updated Billing Assistant

Billing Assistant has new buttons at the bottom of the screen (Pre-Bill Worksheet, Generate Bill). There are also additional billing rules which can be used when viewing billable clients in a list. New pages on the Billing Assistant show interest and client hold settings.

Inactive References

It is now possible to make client references "Inactive". Open the client reference list and change a reference to "inactive". It is also possible to see whether the reference is derived from a global reference (template client reference) or client reference.

Enhanced Reporting

- New report: Timekeeper Collections and Contribution allows you to track total WIP, billed, collected, written-off, discounts, etc. for fees and costs by timekeeper.
- Calculated fields can be inserted into user defined slip and client reports.

Automatic Conflict Checking

This feature can be set up to automatically check for conflicts when saving a new client or timekeeper. This is configured under "SETUP" "GENERAL".

Custom Fee Allocation Labels

Timeslips 2009 allows users to change the label of the fields use to identify categories for fee allocation. Previously, the fields were called "originating", "responsible" or "other".

Auto-fill Transactions with Amount Due

Payments and credits can automatically inherit the amount due if clients generally pay off entire invoices, or the payment amount can default to zero. Timeslips 2007 and below always entered the full amount due, causing payment in full to be accidentally recorded.

More Names Visible on List

When viewing lists of names, more names can now display on lists.

Prompt to Log In When Changing Security

Timeslips will now prompt users to log in again after changing security settings.

Dual Monitor Support

Timeslips now supports dual monitors

FEATURE AND INTERFACE CHANGES: TIMESLIPS 2010

Billing: History Bill Totals

It is now possible to total fees and costs on the History Bill for the Court. It is also possible to include a timekeeper summary on this bill.

Billing: New Bill Layout Fields

Timeslips 2010 has the ability to include fields such as last bill date and last payment amount on the bill layout.

Billing: Email Bill Subject

When sending bills via email, the subject of the email message can now include tokens such as amount due, customer name or invoice number. Change this under SETUP ... PDF DOCUMENT NAMES.

Features Enabled: Disable Revision Stage

One of the most confusing features to many users is "Revision Stage". This can now be disabled in "Features Enabled" to eliminate the confusion.

Purging Data: More Flexible Options

Previous versions forced the user to purge ALL closed names. It is now possible to select only certain names to purge as well as all deleted data.

New Report: Clients Not Billed

Show clients not billed in a specified time period.

New Report: Client Default Rates Report

Report on client default rates to verify that clients are set up correctly. This report is sometimes requested by vendors or clients.

Reporting: Preview Reports / Bill Layouts without Saving

Previous versions of Timeslips forced users to save a report in order to view it adding many "test" versions of reports before saving the final format. Now it is possible to view the report or bill layout before saving it.

Reporting: Custom fields on Calculations

Numeric custom fields can now be used in report calculations.

Reporting: Global Option for Dollar Signs and Commas

Reports which have money fields can now show dollar signs (optional), and large values can be formatted with commas. This is a global option.

Reporting: Rate Analysis

The Rate Analysis report now has additional levels for sorting

Reporting: Print to Excel

When printing reports to Excel, previous versions were unable to display the report in a format that matched the Timeslips displayed report. Timeslips 2010 has the option of displaying the report as displayed or in columns.

Custom Fields: Numeric Type

Custom fields can now be defined as a numeric field. This can be very useful when sorting and sub-totaling reports. This data type in calculated fields (custom reports) introduces many options to improve reporting functionality.

Data Entry: Option to use "ENTER" to move through fields

A new option defined in preferences (SETUP...PREFERENCES...INTERFACE tab) is available to define whether or not pressing the ENTER key takes the cursor to the next field.

Data Entry: Resizable Time Sheet

Newer monitors are wider and the resizable time sheet allows users to see more information on the screen. Use the handles on the corner of the timesheet to expand the size of the window.

Data Entry: Slip Notes

Slip notes are the yellow rectangles that appear at the top of the slip. These are special notes that can be added which will not appear on a bill, but can show on reports and pre-bill worksheets. Timeslips 2010 allows slip notes to be:

1. Viewed by hovering over the icon (yellow note)
2. Entered/reviewed when using the timesheet view (click the yellow icon)
3. Included in user defined slip listing reports (new to Timeslips 2010)
4. Search for text now includes slip notes if desired

Setup Enhancement: Transaction Description

Click Setup ... General and then choose the "Transactions" section, Default Descriptions sub-category. It is now possible to reset transaction descriptions back to the defaults if desired.

FEATURE AND INTERFACE CHANGES: TIMESLIPS 2011

Customize List Appearance

Change how Timeslips displays lists of slips, accounts receivable and funds transactions by changing color and highlights of every other row. You can also choose which fields to display and can display one or two rows for each record. Right-click on the list to select the "customize appearance" option.

Quick description entry on lists

When reviewing slips or transactions on the Time and Expense Slip List, the Accounts Receivable List, and the Client Funds List, you can now add or edit descriptions without having to open the record first.

Restrict Slip Entry

When you have restricted clients, you can now configure security so some timekeepers are warned when entering slips for them and other timekeepers are prevented from entering slips for restricted clients.

More Custom Fields – Grouped in Categories

Each name type can have up to 90 custom fields and they can be combined in any of 6 groups.

Workstation Performance

Disable features per workstation to improve performance (Setup ... Performance Settings). Features that can be disabled are Outlook link, Accounting Link, Alert notifications, Feature usage messages and slips from email messages.

Longer Nickname 2 and Require Unique Number

Nickname 2 is no longer limited to 15 characters (limit is now 30 characters); it is also possible to stipulate whether or not duplicates are permitted for nickname 2 and locate duplicates.

Abbreviations and Special Characters

Special characters (@ # \$ % * / -) will now trigger abbreviations.

Payment Types

When you enter payments, you choose the method that the customer used to pay the bill.

Processing Credit Card Payments

You can now enter credit or debit card payments directly through Timeslips if you have a merchant account with Sage Payment Solutions.

User-defined invoice reports

You can now create your own custom reports from invoice transactions. You can optionally include a breakdown of transactions applied to the invoices. This allows you to design reports that include only the invoice information that you need.

Enhanced Graphs and Reports Wizards

Graphs are now more customizable with regards to fields and format. The reports wizards are improved to facilitate creating your own reports.

Starting Templates for User Defined Reports

User-defined reports are easier to create because Timeslips has a starting template, or you can choose to create the report from scratch.

Calculation Totals

New totaling options are available in Timeslips 2011 when showing sums of data.

Previewing Reports: Change View Size

Size of report can be modified to improve visibility of report in display.

FEATURE AND INTERFACE CHANGES: TIMESLIPS 2012

General Settings

Interface is updated with the navigation bar on the left. Easier to understand and configure.

Personal Preferences (Setup ... Preferences)

Interface is updated with navigation bar on the left. The following changes have been made to Preferences:

- Billing Assistant: More colors available for buttons
- Speller/Grammar: More dictionaries and can choose up to 6 dictionaries including a technical dictionary
- Speller/Grammar: Can edit personal dictionary from this screen
- Alerts: More control over the way alerts appear
- Database paths: Can specify default database path, reports to file, import/export files, report templates, backups

Features Enabled

Interface is updated with navigation bar on the left; Features can be disabled individually or multiple features at a time; Link available to view the feature description and identify how often the feature was used.

Enhanced Navigator Changes

Enhanced navigators have been changed:

- Data is drawn faster when the navigator is edited, resized or refreshed
- Can print sections from any page of navigator (right-click on the navigator section to print)
- Can double-click any section to expand it to a fuller view
- Network users can now make a local copy of the navigator so that their changes do not affect others

Network Installations: Exclusive mode

New command to lock database in exclusive mode (Special > Exclusive Mode) to keep other users out of the database for maintenance. The message will provide information such as who and why the database is locked. (See Timeslips 2013 for the ability to force user out of Timeslips)

Custom Fields and Audit Houses

Can quickly add custom fields for the various audit houses. From the list, right-click and choose "Add Pre-defined Set".

Slips: Change Upper/Lower Case

Right-click in the slip's description field to change to uppercase or lowercase.

Slips: Character & word count

Right-click and choose Word Count to view a word or character count in a slip description.

Replacement Slips: Specify How Dates Appear on Bills

Replacement slips in the past have used the current date. The replacement slip dialog box now contains an option to specify start and end dates.

Transactions: Disable Unused Types and Default Payment

Timeslips 2011 introduced many new transaction types which would always appear. Now you can hide unused transaction types (General Settings).

Transactions: Default Payment Type

Preference (Setup ... Preferences ... Transactions ... New Transaction Rules) allows user to specify the default payment type.

Prompt to Create Payment from Funds

If a client has a prior A/R balance and a payment to funds is entered, Timeslips will prompt to add a payment from account (to pay the prior balance).

Printing Bills and Reports

- Printing bills to a file or PDF saves a bill image
- Saving bill or report to PDF or RTF gives more options including printing to a single file or multiple files
- Can set up custom folders for bills to be printed to, utilizing PDF naming rules (located in Setup > PDF document names)
- Can print to RTF called WYSIWYG which is closer to the format on screen but it is more difficult to edit
- Printing to PDF: Can prevent fonts from being embedded to reduce the size of the PDF file
- Option to include thumbnail views of each page which is helpful for older versions of Adobe Reader
- Printing bill to PDF or file, can optionally open the file after printing

Omit Suspense Payment from Bills

When generating bills, report options now include the choice to exclude payments with suspense amounts. This will allow users to not apply overpayments to new charges if desired.

Reprint Bills Enhancements

Can reprint bills that were printed to PDF, RTF or text file

Can reprint bills to PDF with separate PDF for each bill image (follows naming and location of files in setup).

TAL: Mark Transactions as Posted without Posting

Ability to mark transactions as "posted" to prevent it from posting to the accounting system. Click "Accounting ... Mark Transactions as Posted" from the top menu bar.

Merge client information with Word documents

Can generate mail merge jobs for collections or other letters to clients (uses wizard)

Document Access: Setting up Client Folders

SETUP ... DOCUMENT LOCATIONS will configure this feature. This is where Timeslips will store bills and statements printed to PDF

Document Access: Opening Client Folders

From the client list, right-click on the client nickname and select "Explore document folder".

Document Access: Adding more shortcuts

From the client list, right-click on the client nickname and select "View Documents" (or click file cabinet icon) to open the documents shortcuts dialog box. You can add links to documents, folders, web addresses or delete shortcuts from this box.

FEATURE AND INTERFACE CHANGES: TIMESLIPS 2013

Deleting Multiple Slips

To delete multiple slips at once, from the main menu click SLIPS ... DELETE MULTIPLE SLIPS. Use the selection criteria to identify a sub-set of the slip list. It is also possible to click on the column header to sort by that field. Mark the slips to be deleted and click "Delete" to delete the marked slips. After the slips have been deleted, an option to "View Log" will appear.

Attaching Files to Slips

There is a new "attachment" section at the bottom of a slip window. Click the 3 dots (...) box to locate the file and attach a slip. Click the "include attachment with bill" to include the attachment with the bill (not all file types will print but all file types will attach to email).

If the attachment is an image file (BMP, DIB, JPG, TIF, PNG, EMF or WMF) it can be attached to a printed bill; any file types can be attached to emailed bills.

When generating bills, there is an option to include attachments to bills as well as an option to print a list of the attachment files. This option must be selected or the image will not be included with the bill.

Slip Triggers

When a slip is saved, Timeslips can be configured to create another slip. For example, if a slip with activity "Deposition" is saved, the system can create a new slip for Court Reporter Fee.

Create the rule for a slip trigger under SLIPS ... SLIP TRIGGERS. Define the criteria and which clients the trigger pertains to.

Time Format on Slips: HH:MM or Decimal Format

Each user can specify their preferred method for displaying the slip time spent. From the main menu click SETUP ... PREFERENCES and choose the "Slips" ... "Options" section. There is a checkmark if slip time spent should be shown in decimal format.

Restrict Slip Entry: Passed Dates / Large Time Values

There is now a global (system wide) setting to prevent users from entering slips with an old date or large time spent. From the main menu click SETUP ... GENERAL and choose the "Slips, A/R & Funds" section. Specify a cut-off date for slips (prevents users from entering slips for older date range). Also specify a maximum time spent. See next section for Security restrictions

Security Restrictions on Slips

Each user's security profile has the ability to prevent slip entry or warn against slip entry. There is also a security setting for deleting bills slips.

From the main menu choose SETUP ... SECURITY. Choose the correct profile from the drop-down, and select the area SLIP. Options available are:

- Allow slip creation on restricted clients
- Allow slip creation on restricted dates (new feature)
- Allow slip creation on restricted time spent (new feature)
- Delete Billed Slips (new feature)

Multiple Prices on Expenses

Expenses can now store up to 20 prices. This is useful if clients accept different rates for the same expense (example: copies). Also, the default value is defined on the expense name. This is located under NAMES ... EXPENSE INFO.

Suggestion: If different clients accept different rates, take advantage of the private text feature to document which clients have which price values in the default description field. The text will not appear on bills but will remind users of the client's specific price requirements.

Custom Fields: Relative Dates

Custom fields appear on clients, timekeepers and tasks. Firms using electronic billing may need to have a billing start and billing end date as a custom field. Instead of changing this field each month, the field can be set as a relative date. Start date could be the first day of prior month, and end date would be the last day of prior month. This is defined under SETUP ... CUSTOM FIELDS.

Transaction Defaults

It is possible to define the default for new transactions under SETUP ... PREFERENCES. The Transactions section, "New Transaction Rules" specifies what fields to copy when creating a new transaction.

Calendars

Appointments, events and to do items can be tracked in Sage Timeslips' calendar feature. Each calendar has 4 views (month, week, day, and list). Create new entries and add attendees to the calendar, if desired. Meetings can be configured to create a new slip when the meeting time is passed.

Close Database - Exclusive Mode

Administrators now have the ability to remove users from Timeslips. If a user has a data entry window open, their data can be automatically saved regardless of the user's preferences. From the SETUP ... GENERAL menu, choose "Other" under the FIRM section. Close database rules specifies what happens when the database is closed to invoke Exclusive Mode.

FEATURE AND INTERFACE CHANGES: TIMESLIPS 2014

Slip List Filter

The slip list now includes a filter to limit the number of slips viewed to the most recent slips entered.

Slip List Appearance Options

From the slip list, choose the last icon (list appearance options) or right-click on the slip list header and choose "List Appearance Options" to hide or show specific fields on the list, change colors and hide or show specific areas (such as descriptions and record count) in the slip list. There are defaults for the fields shown to simplify changing the appearance.

Slip Preferences – Pasted Text Option

From the top menu bar, choose Setup ... Preferences ... Slips ... Options to control how to paste text from other applications: plain text does not include formatting; rich text includes bolding, italics, etc.

Slip Preferences – Slip List Options

From the top menu bar choose Setup ... Preferences ... Slips... Slip List to specify:

- (1) Which slip tab and slips are selected when opening the list
- (2) Whether to hide "hidden" slips or show the slips with "Hidden due to security" label
- (3) Automatically update slip list when generating bills or editing slips

Slip Preferences: Slip Entry

From the top menu bar choose Setup ... Preferences ... Slips ... New Slip Rules to specify whether the new slip automatically selects the logged in user or inherits fields from open windows.

Calendar Synchronization

Timeslips can now synch with Google calendar

Printing from Lists

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

TAL Pro

TAL Pro has been completely rewritten. All Accounting Link features are accessed from the main menu bar "Accounting". TAL Pro is documented in a separate document.

TimeCapture Application

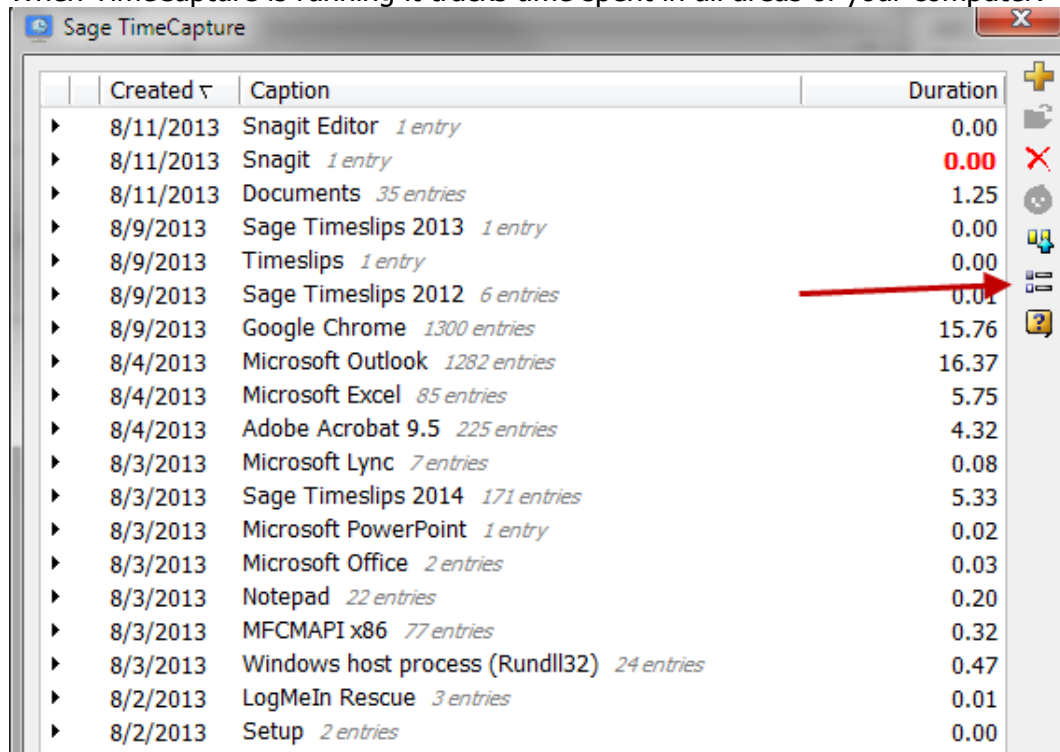
TSTimer has been replaced with a new application called TimeCapture.

- TimeCapture can load automatically when you start your workstation.
- TimeCapture can track time automatically, based on the applications and windows that you access on your workstation.
- 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.
- You can convert all entries or specific entries into time slips for reporting and billing.

TimeCapture Feature

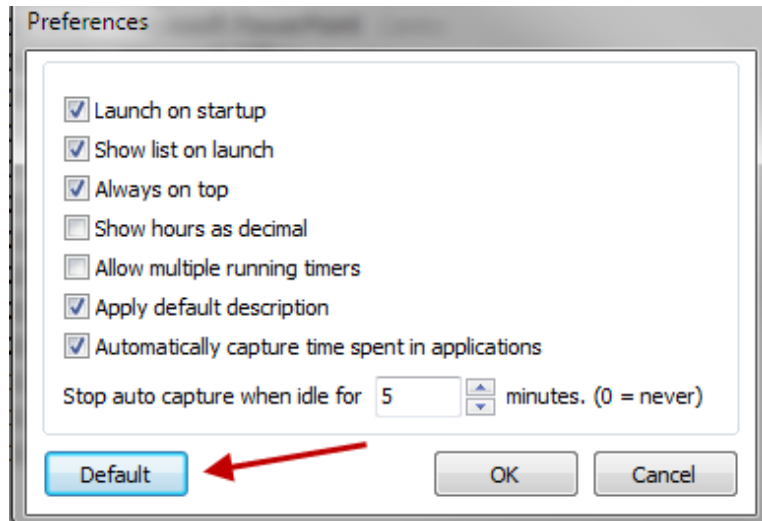
TimeCapture is a separate program that can run concurrently with Timeslips. From the start menu, under the Timeslips program group is a new program called TimeCapture.

When TimeCapture is running it tracks time spent in all areas of your computer:

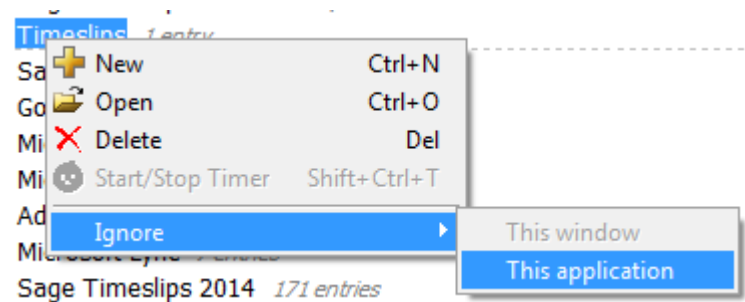


Created	Caption	Duration
8/11/2013	Snagit Editor 1 entry	0.00
8/11/2013	Snagit 1 entry	0.00
8/11/2013	Documents 35 entries	1.25
8/9/2013	Sage Timeslips 2013 1 entry	0.00
8/9/2013	Timeslips 1 entry	0.00
8/9/2013	Sage Timeslips 2012 6 entries	0.01
8/9/2013	Google Chrome 1300 entries	15.76
8/4/2013	Microsoft Outlook 1282 entries	16.37
8/4/2013	Microsoft Excel 85 entries	5.75
8/4/2013	Adobe Acrobat 9.5 225 entries	4.32
8/3/2013	Microsoft Lync 7 entries	0.08
8/3/2013	Sage Timeslips 2014 171 entries	5.33
8/3/2013	Microsoft PowerPoint 1 entry	0.02
8/3/2013	Microsoft Office 2 entries	0.03
8/3/2013	Notepad 22 entries	0.20
8/3/2013	MFCMAPI x86 77 entries	0.32
8/3/2013	Windows host process (Rundll32) 24 entries	0.47
8/2/2013	LogMeIn Rescue 3 entries	0.01
8/2/2013	Setup 2 entries	0.00

The icon on the right (second from the bottom) is where the preferences are set. Click the "Default" button for the following settings:



From the list of applications, right click and choose "Ignore" ... "This application" to no longer track time spent in that program:



The ignore rules are created and can be modified when the rules icon on the right is clicked. The rules can be used to:

- Ignore applications
- Move entries into a specific group to make it easier to bill them
- Combine entries based on client name
- Assign names to time entries (Example: Any documents containing "Smith" are automatically assigned to the "Smith" matter); All entries created from a Word document are assigned the task "Preparation".

The TimeCapture icon: 

Right click on it to select preferences, show, keep on top, copy data file or exit.

Creating Slips from Time Entries

Double-click on any entry to assign the timekeeper, client, activity; Time spent and date are pulled from the entry in the list. Then, any entry with valid information will appear with a green checkmark. Click "Convert to slips" at the bottom of the list:

7/8/2013	Import	0.01
7/8/2013	Add Wallet Item	0.00
7/8/2013	Add Accounts Item	0.00
5/13/2013	Secure Note	0.09
5/10/2013	Local Install Instructions for Timeslips.docx [Co...	0.00
8/11/2013	Sage Timeslips 2014 172 entries	5.33
8/11/2013	Paint.NET 2 entries	0.00
8/11/2013	Unsaved Changes	0.00
8/11/2013	Untitled (100%) - Paint.NET v3.5.10	0.00
8/11/2013	Snagit 1 entry	0.00
8/11/2013	<No Caption>	0.00
8/4/2013	Microsoft Outlook 1282 entries	16.37
8/4/2013	Microsoft Excel 85 entries	5.75
Convert to Slips...		Total 34.28

FEATURE AND INTERFACE CHANGES: TIMESLIPS 2015/2016

General Settings: Additional Firm Information

Additional fields are available on the Address Information section (email address, website). These fields can be added to bills and reports by editing the layout. From the main menu click SETUP ... GENERAL to view these additional fields.

Text Search Re-designed

From the main menu, SPECIAL ... TEXT SEARCH has more options in the fields being searched and an easier interface. Search results are sortable (click the column header to sort).

Client Information: Redesigned layout

The Client Information dialog box is redesigned so that related fields and options are grouped together. Sections now exist for Arrangement, Holds, Charges, Invoices and Layouts. Earlier versions only showed "Arrangement 1" and "Arrangement 2" tabs.

Client Information: Secondary Address

There is now a secondary address on each client information screen. It is possible to swap addresses with a single click and both addresses can be added to the bill layout.

Client Custom Activities List

It is possible to set up specific tasks or expenses based on the client. The "My Lists" feature must be enabled (Setup ... Features Enabled). When this is configured, it is possible to right-click on the list to see all tasks or expenses.

Define which tasks are assigned to each client on the Client Information screen, the last tab on the left.

Change Client Classification Enhancement

When changing client classification to inactive or closed, a list of each client and the "warnings" appear immediately. In prior versions, each client had to be selected and the database searched before the warnings appeared.

Transactions: Generate Receipt for Payment

Receipts for payments are available for payments, reverse payments, payments to account and payments from account. Templates for verbiage can be found under SETUP ... RECEIPT TEMPLATES.

Open the transaction and click the last icon on the right to view the payment receipt. At the bottom, click "Print" or "Email" to send the receipt.

Billing: Watermark on Draft Bills

Firms often use a draft bill either instead of or in addition to pre-bill worksheets. In the Generate Bills Options dialog box, the last section has draft bill options to limit descriptions to 4 lines and to show "Draft" watermark on bills. The watermark text can be customized, printed diagonally, and include timekeeper and/or date.

Draft bills cannot be placed in PROOF stage; Draft bills cannot be emailed.

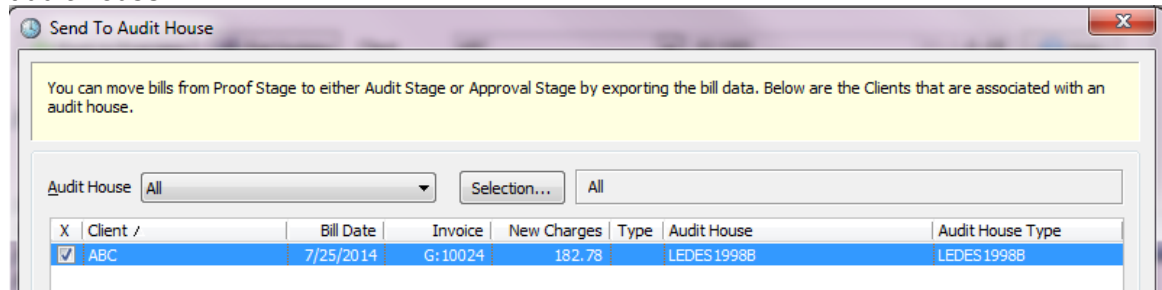
Reprint Bills Dialog Box: Additional Fields

When reprinting bills, additional fields including how many pages, whether or not a cover page is part of the bill, and whether or not it is part of a consolidated or split bill appear on the list. The list can be sorted based on column heading. Also, a totals section shows total page count and totals invoice balance.

Electronic Billing Process Enhancements (Add-on Product to Timeslips)

Electronic bill fields are configured from SETUP ... AUDIT HOUSES. Choose the specific audit house and open it to define the matching fields and flag whether or not UTBMS codes are required.

The dialog box for exporting bills to an electronic format to audit houses using LEDES1998B and other formats. It is no longer necessary to search for clients eligible to be exported; the list shows which clients are ready to be sent to the audit house.



After the export, the user is prompted and can choose whether or not to move the bill stage to "Audit".

TimeCapture Enhancements:

Start TimeCapture from Timeslips: Click SPECIAL ... TIMECAPTURE

Time Capture can be started

Edit Time Entries with Groups: Drag and drop entries from one group to another; Hold "CONTROL" while clicking multiple entries to select more than one entry to move

Merge Entries: Hold "CONTROL" and click on a multiple entries or groups to select what should be combined into a single entry; then, right-click and choose "Merge Entries". The text from each entry will appear on the new entry.

Export Rules: Rules can be exported to a file and other users can import the same rules. Also helpful if upgrading to a new workstation

Convert Single Entry: In the past, it was not possible to select a single entry to convert to a slip. It is now possible to right-click on a single entry and convert it to a slip (it must be assigned client and activity codes)

Speech Recognition (Uses Windows Speech Recognition)

Speech Recognition is a brand new feature. New slip, new time slip, new expense slip, new client, new task, new expense, save record, slip list are the commands available.

Enable this feature in the user's preferences by clicking "SETUP" ... "PREFERENCES" and click the "Menu and Commands" tab on the left (3rd from the top). Click the option for "Enable Spoken Commands". Click OK and the Speech Recognition tutorial will start. You must complete this tutorial. Your computer hardware must be equipped for text to speech.

To activate the tutorial manually, from the Windows Control Panel choose "Speech Recognition". This is where more information on using speech recognition and various commands can be found.