

TIMESLIPS UPGRADES: CHANGES BY VERSION

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

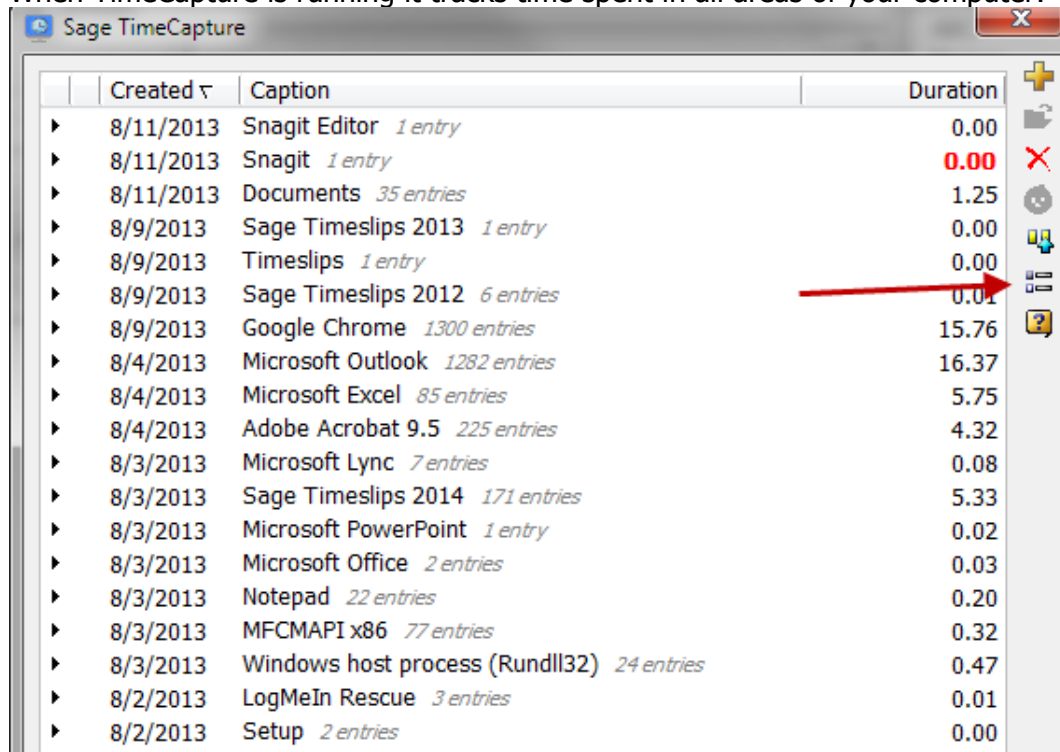
TSTimer has been replaced with a new application called TimeCapture.

- 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

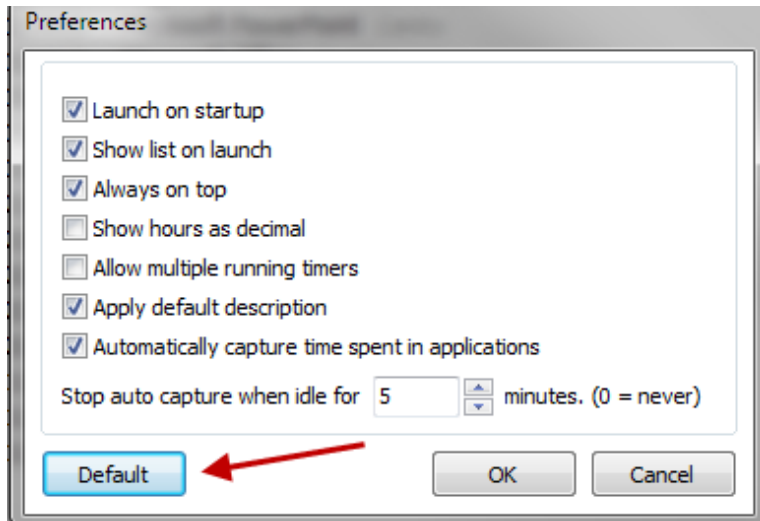
TimeCapture is a separate program that can run concurrently with Timeslips. From the start menu, under the Timeslips program group is a new program called TimeCapture.

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

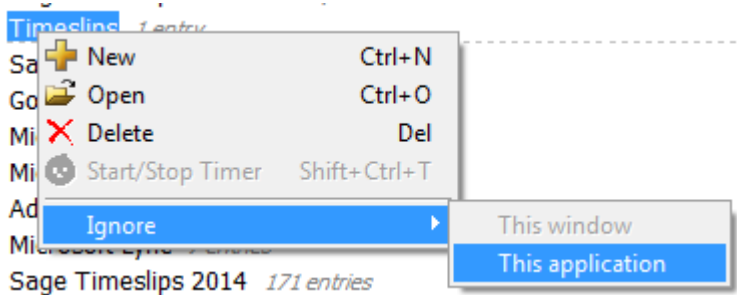


Created	Caption	Duration
8/11/2013	Snagit Editor 1 entry	0.00
8/11/2013	Snagit 1 entry	0.00
8/11/2013	Documents 35 entries	1.25
8/9/2013	Sage Timeslips 2013 1 entry	0.00
8/9/2013	Timeslips 1 entry	0.00
8/9/2013	Sage Timeslips 2012 6 entries	0.01
8/9/2013	Google Chrome 1300 entries	15.76
8/4/2013	Microsoft 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.

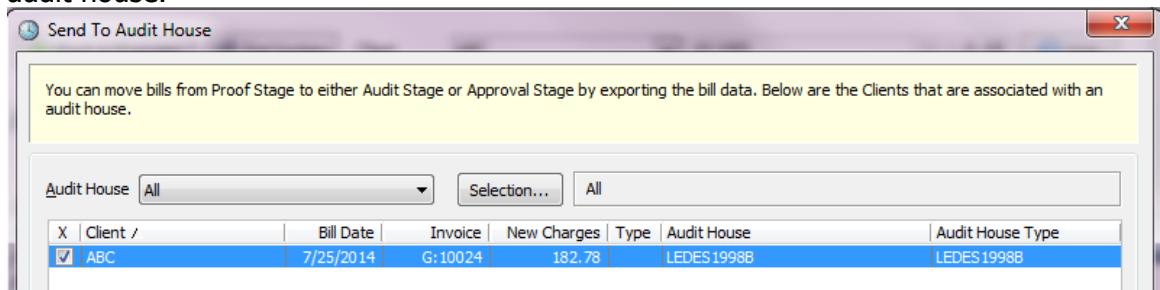
Reprint Bills Dialog Box: Additional Fields

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.