

TIMESLIPS PREMIUM UPDATES

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Date	Area	Description	Details
Build 28.0.0.41 - March 2019	Billing	New filtering options when preparing for bills	When preparing for billing, you can now include only those clients with billable charges. On Pre-bill Worksheets or Totals Only Worksheets (select Reports > Billing), unmark the new "Include bills with activity and no billable charges" option; on Billing Assistant (select Bills > Billing Assistant), use the new "any billable charges" rule.
Build 28.0.0.41 - March 2019	Billing	Generation of Bills Completed shows additional information.	After printing bills (select Bills > Generate Bills), the Generation of Bills Completed dialog box shows information about the bill run. This screen now shows additional totals, such as number of bills that will be sent by email and the number of clients with no data.
Build 28.0.0.41 - March 2019	Reports	Additional searching available for Name Filters	When using name filters to filter the contents of a report, you use the new Find field to limit the timekeepers, clients, tasks, expenses, or references displayed. Type a few characters in the Find field and the name list will show names that include the search string anywhere in the nicknames or full name. You can mark those you want to include in the report.
Build 28.0.0.41 - March 2019	Reports	View a specific page of a displayed report	When printing reports to Display, you can now use controls in the bottom left to jump to a specific page of the report. In previous versions you had to move through the report one page at a time, but now you can scroll through the report or jump to a specific page.
Build 28.0.0.41 - March 2019	Slips	Duplicate one slip to many clients	Some firms often make duplicates of current slips and assign them to other clients. You can now speed up this process. From the Time and Expense Slip List (select Slips > Time and Expense Slips), right click on a slip and choose Duplicate to Multiple Clients.
Build 28.0.0.41 - March 2019	Slips	Additional details available when managing active slips	For firms that use the stopwatch to time slips, the Stop Timers dialog box (select Slips > Stop Timers) now includes more information to help you manage active slips.
Build 28.0.0.41 - March 2019	Transactions	Simplified invoice payment	When you receive a payment from a client, there is a new shortcut to speed up the entry in Timeslips. From the Accounts Receivables List (select Transactions > Accounts Receivable), right click on the invoice being paid and choose Pay This Invoice. Timeslips will start a new payment, filling in many of the fields for you.

Build 28.0.0.41 - March 2019	Transactions	Simplified reverse payment	If you have to reverse a payment from a client, there is a new shortcut to speed up the entry in Timeslips. From the Accounts Receivables List (select Transactions > Accounts Receivable), right click on the payment being reversed and choose Reverse This Payment. Timeslips will start a new reverse payment, filling in many of the fields for you.
Build 28.0.0.41 - March 2019	Transactions	Additional totals on Accounts Receivable List	The Accounts Receivables List (select Transactions > Accounts Receivable) now shows totals for Debits and Credits below the list.
Build 28.0.0.41 - March 2019	Transactions	Apply credits to open invoices	When you enter credits, the Apply All button is available, which can apply the credit amount to multiple open invoices at the same time.
Build 28.0.0.41 - March 2019	Database Maintenance	Data Summary provides an overview of database contents	The Data Summary (select Special > Data Summary) provides an overview of your database, including number of slips, transactions, clients, reference, bill images, etc.
Build 28.0.0.41 - March 2019	Database Maintenance	Review logged-in users	When you have security set up (select Setup > Security > Security Settings), supervisors can use the new Logins page to audit database access. Use this list to review when other logins accessed the database, the application they used, and the name of their workstation.
Build 28.0.0.41 - March 2019	Database Maintenance	Display Firebird information in TSAdmin	You can use Timeslips Administrator (select Special > Timeslips Administrator) to troubleshoot problems in Timeslips. When you click Diagnose This Computer, the Firebird Database Engine section now shows the version of Firebird you are using.
Build 28.0.1.96 - August 2019	Slips	Restrict Slips After A Date	You can now restrict slips that were entered after a specific date. For example, you may not want slips to be entered for future dates, so you can restrict dates entered after today, or after this week, or after this month. Go to Setup > General > Slip, A/R, and Funds to get to this new setting. It is named Do not allow saving slips with a date after. You can use a static date or a relative date (a relative date makes more sense).
Build 28.0.1.96 - August 2019	Slips	Add Time Spent to the Stop Timers dialog box	The Stop Timers dialog box (select Slips > Stop Timers) now shows the Time Spent for running timers. This is useful to verify no timers were left running by mistake.
Build 28.0.1.96 - August 2019	Slips	Show the Stop Timers dialog box when timers meet threshold	You can now set a time threshold for running timers. When Timeslips starts, if any slips with active timers meet the threshold, the Stop Timers dialog box (select Slips > Stop Timers) opens, allowing you to act on active timers. This helps you avoid runaway timers and inflated slip values.

Build 28.0.1.96 - August 2019	Lists	Customize Columns on Name Lists	You can now change the fields that appear in Name Lists: Timekeeper List, Client List, Task List, Expense List. This can make lists more useful, showing fields that are more important to you. For example, for clients, select Names > Client Info > click the List Appearance Options toolbar button to choose which fields to show in the list.
Build 28.0.1.96 - August 2019	Lists	Print from Name Lists	You can now print a quick list of names from name lists. You can now print a quick list of names from name lists. For example, for clients, select Names > Client Info > click the Print List toolbar button. The printed report will reflect any columns you're showing and the current sort order applied to the list.
Build 28.0.1.96 - August 2019	Lists	Searching Name Lists	You can now search on any of the displayed columns in a name list. You can now search on any of the displayed columns in a name list. For example, for clients select Names > Client Info; if the search bar (labeled Find) is not displayed, click Show Search. Enter the text you want to find and the list will show any matches.
Build 28.0.1.96 - August 2019	Client Funds	Replenish Funds Email	You can now email a funds replenishment request directly to a client at any time. Go to Transactions > Send Funds Replenishment Emails to show which clients are below their minimum funds balance. From here, you review when you last requested funds replenishment and send an email to them.
Build 28.0.1.96 - August 2019	Billing	Password-Protected Bills and Statements	You can now password-protect bills and statements printed to PDF, so unauthorized viewers cannot open them. To assign a password to a client, select Names > Client Info > open a client > Invoices > PDF Password. You can also assign a global password for your firm, so you can view the PDFs without having to remember each individual password. To assign a global password, select Setup > PDF Setup > Security.
Build 28.0.1.96 - August 2019	Slips	Mark Slips as Exported	This enhancement simplifies the process of marking slips as Exported. Before printing a user-defined slip listing, open Options and set the new When exporting, mark slips as Exported option.
Build 28.0.1.96 - August 2019	LawPay	Support for LawPay eChecks	When a customer submits an eCheck in LawPay, that transaction is now available as a source for a new payment in Timeslips. In Timeslips, go to Transactions > LawPay Transactions to review LawPay transactions and act on them.
Build 28.0.1.96 - August 2019	LawPay	Provide new tokens for LawPay messages that include replenishment amounts	There are now two additional tokens available for emails: (1) LawPay Link with Invoice plus Replenish Amount; (2) LawPay Link with Balance plus Replenish Amount. These new tokens reflect values that take into account when a client must replenish their client funds.

Build 28.0.2.123 - November 2019	Reports	New Report Types: User-Defined Transaction Reports	There are now two new types of user-defined reports available: user-defined transaction listing (which can show details from each transaction) and user-defined transaction summary (which can summarize totals for all included transactions). Both reports are available with Client reports (select Reports > Client). These reports can show data fields and totals from time and expense slips, accounts receivable transactions, client funds transactions, and clients, and display them in one report. Like with other user-defined reports, by choosing data fields, selection filters, and sort/subtotal options, you can make a variety of useful reports.
Build 28.0.2.123 - November 2019	Reports	New Groups of Report Fields on User-Defined Client Reports	When designing user-defined client listing reports or user-defined client summary reports (select Reports > Client), there are new groups of fields available to use. The fields in the Accounts Receivable Totals section allow you to show a/r transaction totals and distribution totals for the transactions included in your selection. The fields in the Funds Totals section allow you to show funds transaction totals for the transactions included in your selection.
Build 28.0.2.123 - November 2019	Reports	New Field: Email Template field is now available on User-Defined Client Reports	When designing user-defined client listing reports (select Reports > Client), you can add the Email Template to the report. This is useful to quickly view which template each client uses when emailing bills.
Build 28.0.2.123 - November 2019	Reports	New Report: Client Balance Overview	A new user-defined client report is now available with Client reports (select Reports > Client). The Client Balance Overview shows the current A/R balance for each client, along with the debit and credit totals contributing to the A/R balance. Because this is a user-defined report you can easily customize it further to fit your needs.
Build 28.0.2.123 - November 2019	Reports	New Report: Top Clients Collected	A new user-defined client report is now available with Client reports (select Reports > Client). The Top Clients Collected shows the totals payments collected for each client. Other details, such as total write-offs, discounts, and credits are available, but the report is sorted by total payments. Because this is a user-defined report you can easily customize it further to fit your needs.
Build 28.0.2.123 - November 2019	Reports	New Report: Slips, A/R, and Funds by Client	A new user-defined client report is now available with Client reports (select Reports > Client). The Slips, A/R, and Funds by Client report shows totals of each slip and transaction type for each month. It's an easy way to audit the slips and transactions entered for each client on a monthly basis. Because this is a user-defined report you can easily customize it further to fit your needs.

Build 28.0.2.123 - November 2019	Reports	A new user-defined client report is now available with Client reports (select Reports > Client). The Slips, A/R, and Funds by Client report shows totals of each slip and transaction type for each month. It's an easy way to audit the slips and transactions entered for each client on a monthly basis. Because this is a user-defined report you can easily customize it further to fit your needs.	When you are setting up a Client Selection filter on a bill or report, you can now right click on a project and choose "Select All Projects Associated with This Client". All related projects will automatically be marked for you. This can speed up project selection for clients with many projects.
Build 28.0.2.123 - November 2019	Reports	Show History Period in Status	When you are designing user-defined reports that include client history fields, you can choose which history totals to use. For example, one history total could use Inception to Date totals and another could use Year to Date totals. When you click on those fields in the report designer, you can now see which history total the field is using.
Build 28.0.2.123 - November 2019	Support	Chat Link is now Available on Mail Menu	When using Timeslips, you can now click Live Chat on the main menu to connect with Support.
Build 28.0.2.123 - November 2019	Support	Access Latest Release Notes from the Help Menu	When using Timeslips, you can now access the latest Release Notes from the Help menu. Select Help > Sage Support > View latest release notes to review the latest changes.
Build 29.0.0.42 - March 2020	Billing	Billing Cycle: Undo Multiple Bills	If you need to change details on a client's bill, in previous versions you were able to undo only the last approved bill. Now, you may be able to undo multiple bills for that client. Select Bills > Undo Multiple Bills to open the Undo Multiple Bills dialog box. This undo process provides images of any bills you undo. It also includes details such as the slips, transactions, and billing arrangements included on the original bills to make it easy for you to re-bill your client. Please note that only bills generated after build 29.0.0.000 will be available to undo with this feature. You can see which build was installed for each bill run on the Review Bill Runs dialog box (select Bills > Review Bill Runs).
Build 29.0.0.42 - March 2020	Search	Find and Replace	You can use Find and Replace to search for text within many areas of Timeslips and replace it with other text. For example, a client may have changed its firm name and you want to quickly change that name in slip descriptions, payment descriptions, and other areas. To search for text, select Special > Find and Replace to open the Find and Replace dialog box.
Build 29.0.1.64 - June 2020	Billing	Printing PDF Attachments with Bills	When printing attachments with bills, previous versions of Timeslips could only include image-based attachments. Timeslips can now also include PDF-based attachments. To access the new option: (1) select Bills > Generate Bills; (2) Click the Options button; (3) Optionally mark Print PDF attachments

Build 29.0.1.64 - June 2020	Billing	Maintaining Auto Payments when Undoing Bills	In previous versions of Timeslips, when you undid approval for a bill that included automatic payments from funds, Timeslips would delete those payments. Now, you can choose how Timeslips handles that situation. To access the new option: (1) Select Setup > General; (2) Switch to the Slips, A/R, & Funds page; (3) Use the Auto Payments options at the bottom of this screen to determine how to handle automatic payments
Build 29.0.1.64 - June 2020	Electronic Billing	Add Audit House details to the Bill Stages dialog box	You can use the Bill Stages dialog box (select Bills > Approve or Clear Bills) to move clients through the billing cycle. The pages of this dialog now show the audit house (if any) used to export each bill's data for review.
Build 29.0.1.64 - June 2020	Electronic Billing	Specify Format of Quantity field in Audit House Export	When setting up audit house templates (select Setup > Audit Houses), you can now determine how many decimal places to show for quantity/unit fields.
Build 29.0.1.64 - June 2020	Reports	Adding Last Transaction Date to Funds Account Listing	When printing the Funds Account Listing report (select Reports > Funds Transactions), there is a new option, Show last transaction date. Use this option to show the date of the last transaction affecting each of the funds accounts included on the report. To access the new option: (1) Select Reports > Funds Transactions; (2) Double click on the Funds Account Listing; (3) Click Options; (4) Otionally mark Show last transaction date
Build 29.0.1.64 - June 2020	Reports	Updating Other Report Fields	On user-defined reports, bills, and statements, you can place database fields on the report layout and they show values from the database when you print the report. Several fields were showing blank values when printing the report.
Build 29.0.2.92 - October 2020	eCenter	eCenter Client Access Administration	Each account in Sage Timeslips eCenter can share account balances and transaction status with up to 100 of their clients. In past versions, you managed access for your eCenter clients through the Admin Functions page on Timeslips eCenter. We now offer improved management of Client Access directly in Sage Timeslips (select Special > eCenter > Manage Client Access). Here you can review all clients at once and also change access for clients in batches instead of one at a time.
Build 29.0.2.92 - October 2020	eCenter	Show eCenter Information in Timeslips Navigator	Each account in Sage Timeslips eCenter can share account balances and transaction status with up to 100 of their clients. In past versions, you managed access for your eCenter clients through the Admin Functions page on Timeslips eCenter. We now offer improved management of Client Access directly in Sage Timeslips (select Special > eCenter > Manage Client Access). Here you can review all clients at once and also change access for clients in batches instead of one at a time.

Build 29.0.2.92 - October 2020	eCenter	New eCenter fields for User-Defined Client Listings	When designing user-defined client listings (select Reports > Client), there is a new report field available: eCenter Login. There is also a new selection filter: Client Has eCenter Login. Using both of these on a report, you can quickly print a listing of client logins currently in use for eCenter's Client Access.
Build 29.0.2.92 - October 2020	Reports	New Report: Aged WIP with Contact Info	This new report is available within Client reports (select Reports > Client). It shows work in process for each client totalled by your custom aging periods. This report also includes phone and email information for each client in case you need to contact them about their upcoming charges. You can use the report as-is or customize it further by adding or removing fields in the Report Designer.
Build 29.0.2.92 - October 2020	Reports	New WIP fields for User-Defined Client Listing	When designing user-defined client listings (select Reports > Client), there are several new WIP-related report fields available. The new Aged WIP group adds over 30 new fields that you can use to build your own custom Aged WIP reports.
Build 29.0.3.96 - January 2021	Slip List	View the Time and Expense List by My Week or My Month	When viewing slips on the Time and Expense Slip List dialog box (select Slips > Time and Expense Slips), there are new 'View By' options that let you quickly see slips for the current week or for the current month for the logged in timekeeper. From the 'View By' field, choose My Week or My Month. Optionally click Print from the toolbar to include these slips in a Slip Listing report.
Build 29.0.3.96 - January 2021	A/R List	Show the Running Balance on the Accounts Receivable List	When viewing transactions on the Accounts Receivable List dialog box (select Transactions > Accounts Receivable) by client, you can include a Running Balance column so you can see how each transaction affected the balance. To view the list in this format, select Transactions > Accounts Receivable to open the list, set 'View by' to Client, right click on the list and choose List Appearance Options, and then set Field Themes to Running Balance.

Build 29.0.3.96 - January 2021	Reports	Include or exclude Proof slips on slip-related reports	<p>When viewing slips on the Time and Expense Slip List dialog box (select Slips > Time and Expense Slips) or when printing slip-based reports (select Reports > Slips), you can use selection filters to choose which slips to include.</p> <p>There is now a Slip Proof selection filter so you can specifically include or exclude slips that are on Proof Stage.</p> <p>On the Time and Expense Slip List, click the Selection button to use this selection filter.</p> <p>When setting up slip-based reports, double-click on the report to open Report Entry and then use the Selection Filters tab to use this selection filter. This selection filter is available on the following reports: Slip Listing, Slip Summary Listing, User-Defined Slip Listing, and User-Defined Slip Summary.</p>
Build 29.0.3.96 - January 2021	Reports	Include or exclude all Time or all Expense slips on bill-related reports	<p>When viewing billing information or when printing bill-related reports (select Reports > Billing), you can use selection filters to choose which slips to include.</p> <p>There is now a Slip Type selection filter so you can specifically include time slips or expense slips.</p> <p>When reviewing billing information on the Billing Assistant (select Bills > Billing Assistant) or Firm Assistant (select Bills > Firm Assistant), click Selection to use this new selection filter.</p> <p>When setting up bill-related reports, double-click on the report to open Report Entry and then use the Selection Filters tab to use this selection filter. This selection filter is available on the following reports: Generate Bills, Pre-bill Worksheet, Totals Only Worksheet, Firm Assistant Listing, and Firm Assistant Totals.</p>