Sage Timeslips Shortcut Keys

Sage Timeslips provides many ways to access commands and dialog boxes. These shortcut keys are available in specific areas of Sage Timeslips. To access a command, press the key or keys indicated. For example, press **Ctrl+N** to create a new record. This means that you press and hold the **Ctrl** key, and then press the **N** key.

Slip List dialog box

New slip	Ctrl+N
Duplicate slip	Shift+Ctrl+D
Open slip	Ctrl+O
Find slip	Ctrl+Shift+F
Go to slip	Ctrl+Shift+G
Bookmark slip	Ctrl+Shift+K
Start/stop time on slip	F5, Ctrl+Shift+T
Print list of slips	Ctrl+P
Update slip list	Ctrl+Shift+L
Delete selected slip	Ctrl+Del

Slip Entry dialog box

New slip	Ctrl+N
Duplicate slip	Ctrl+Shift+D
Clone field from the previous slip	Ctrl+Shift+C
Clone the rest of the fields	Ctrl+Shift+E
Add/remove bookmark	Ctrl+Shift+K
Use default rate	Ctrl+Shift+L
Update rate rule	Ctrl+Shift+U
Switch to slip list	Ctrl+L
Revert changes on slip	Esc
Save slip	Ctrl+S
Find slip	Ctrl+Shift+F
Go to slip	Ctrl+Shift+G
Move to first slip	Ctrl+PgUp
Move to previous slip	PgUp
Move to next slip	PgDn
Move to last slip	Ctrl+PgDn

Date fields

Same as previous date	S
Today	T
Previous day	<, +, Down
Next day	>, -, Up
Calendar	C

Transaction List dialog boxes

New transaction	Ctrl+N
Open transaction	Ctrl+O
Find transaction	Ctrl+Shift+F
Go to transaction	Ctrl+Shift+G
Print list of transactions	Ctrl+P
Update transaction list	Ctrl+Shift+L
Delete selected transaction	Ctrl+Del

Transaction Entry dialog boxes

(ex: the Accounts Receivable Entry dialog box)

New transaction	Ctrl+N
Switch to transaction list	Ctrl+L
Revert transaction	Esc
Save transaction	Ctrl+S
Find transaction	Ctrl+Shift+F
Go to transaction	Ctrl+Shift+G
Move to first transaction	Ctrl+PgUp
Move to previous transaction	PgUp
Move to next transaction	PgDn
Move to last transaction	Ctrl+PgDn

Report List dialog box

New report	Ctrl+N
Open report	Ctrl+O
Print report	Ctrl+P
Acquire filters from other windows	Ctrl+Shift+F
Move to previous page of reports	Shift+F6
Next to next page of reports	F6
Delete selected report	Ctrl+Del

Report Entry dialog box

New report	Ctrl+N
Print report	Ctrl+P
Switch to report list	Ctrl+L
Acquire filters from other windows	Ctrl+Shift+F
Save report	Ctrl+S
Revert report	Esc

Name List dialog boxes

(ex: Client List dialog box)

New name	Ctrl+N
Open name	Enter, Ctrl+O
Sort by Nickname 1	Shift+Ctrl+1
Sort by Nickname 2	Shift+Ctrl+2
Delete name	Ctrl+Del

Name Information dialog boxes

(ex: Client Information dialog box)

Name list	Ctrl+L
New name	Ctrl+N
Revert changes	Esc
Move to previous page of info	Shift+F6
Move to next page of info	F6
Save name	Ctrl+S
Move to first name	Ctrl+PgUp
Move to previous name	PgUp
Move to next name	PgDn
Move to last name	Ctrl+PgDn

Name fields on slips

New name	Ctrl+Shift+N
Open name	Ctrl+Shift+O
Show nickname 1	Ctrl+Shift+1
Show nickname 2	Ctrl+Shift+2
Switch to task (from Expense field)	Ctrl+Shift+3
Switch to expense (from Task field)	Ctrl+Shift+4

Description and notes fields

Select entire contents of field	Ctrl+A
Copy selected text to clipboard	Ctrl+C
Delete selected text and place in clipboard	Ctrl+X
Paste text from clipboard	Ctrl+V
Delete the selected text	Ctrl+Del
Revert the last entry	Ctrl+Z
Spell check the current word	F4
Spell check the entire field	Shift+F4
Grammar check the entire field	Shift+F5
Open list of abbreviations	Ctrl+F7
Insert private text indicator	Alt+Ins

Sage Timeslips Shortcut Keys

Sage Timeslips provides many ways to access commands and dialog boxes. These shortcut keys are available in specific areas of Sage Timeslips. To access the command, press the key or keys indicated. For example, press **Ctrl+N** to create a new record. This means that you press and hold the **Ctrl** key, and then press the **N** key.

Accessing Billing Commands

Open Billing Assistant	Ctrl+Shift+B
Update Billing Assistant data	Ctrl+Shift+L
Generate bills (outside Billing Assistant)	Ctrl+B
Approve or clear a group of bills	Ctrl+Shift+A
Client billing history	Ctrl+H
Timekeeper billing history	Ctrl+Shift+H

Accessing Lists of Data

Slip list (time and expense entries)	Ctrl+M
Accounts receivable transaction list	Ctrl+T
Client funds transaction list	Ctrl+F

Accessing Lists of Names

Timekeeper list	Ctrl+U
Client list	Ctrl+I
Client reference list	Ctrl+Shift+R
Task list	Ctrl+Y
Expense list	Ctrl+Shift+Y
Budgets list	Ctrl+G

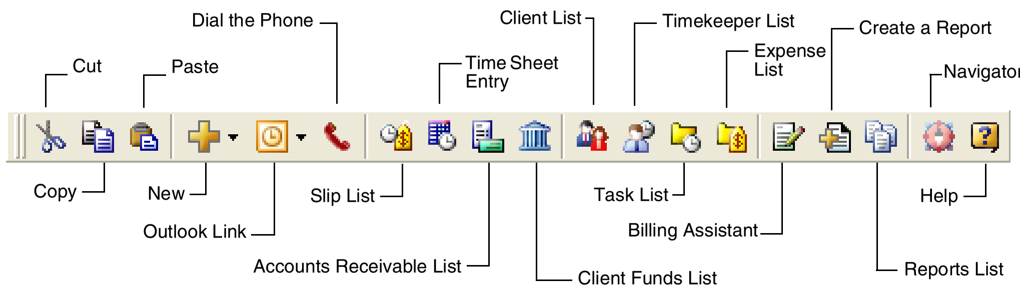
Other Common Commands

Show Navigator	Ctrl+F10
Close all dialogs, except the Navigator	Ctrl+W
Stop all timers for the current login	Ctrl+F5
Stop all timers in the current database	Alt+F5
Show summary of slip entry	F9
Switch to Mini Slip View	Ctrl+Shift+M
Report list	Ctrl+R
Dial the phone	Ctrl+D

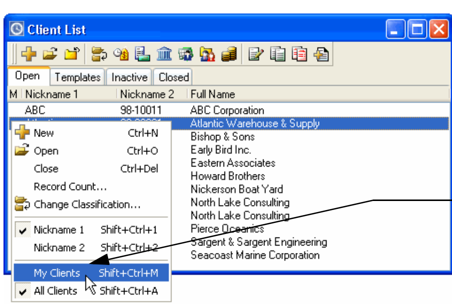
Sage Timeslips Main Toolbar

The following buttons are available on the main Sage Timeslips toolbar. You can choose to show or hide this toolbar in the *Interface* page of the *Personal Preferences* dialog box.

Pressing the **Shift** key clicking a *List* toolbar button is a shortcut to open the associated data entry dialog box. For example, **Shift**+clicking the **Client List** toolbar button opens the *Client Information* dialog box.

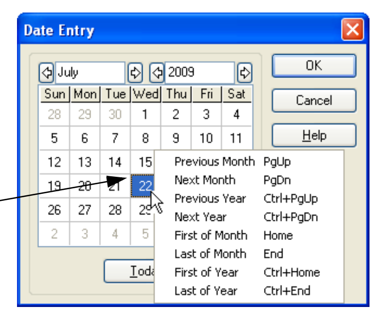


Sage Timeslips Shortcut Menus



Shortcut menus are available on any field within Sage Timeslips. Right-click on any field to open a menu of available commands specific to that field. Right-click on any area between fields to open a menu of available commands for the current dialog box.

Shortcut menus display common commands and include their keystroke combinations and toolbar buttons, when available.



Sage Timeslips

Upgrader's Guide

License agreement

You can review the license agreement at any time. Within Sage Timeslips, select **Help; Contents and Index** and select **Sage Timeslips Software License Agreements** from the *Contents* page.

Copyright

Trademarks

Technical support

Consult the Help system found in Sage Timeslips under the Help menu, or our web site at **http://www.SageTimeslips.com** before contacting us for technical support.

For info on technical support, refer to **http://www.SageTimeslips.com/support**. Terms of technical support are subject to change without notice.

• Table of Contents •

Chapter 4 Sage Timeslips 2012

Chapter 5 Sage Timeslips 2011

Installing Sage Timeslips 2013

1

• Installing Sage Timeslips 2013 •

Introducing Sage Timeslips

Thank you for upgrading to Sage Timeslips 2013. For over 20 years, Sage Timeslips has been established not only as a leader in time and billing software but also as the standard by which other time and billing products are measured.

For more information about Sage Timeslips and Sage, visit our Web site at www.sagetimeslips.com or call 1-800-285-0999.

This chapter covers installing and starting Sage Timeslips 2013. Please note that this is not a comprehensive manual. It is a guide to help you install Sage Timeslips and become familiar with the new features and functionality offered by this upgrade.

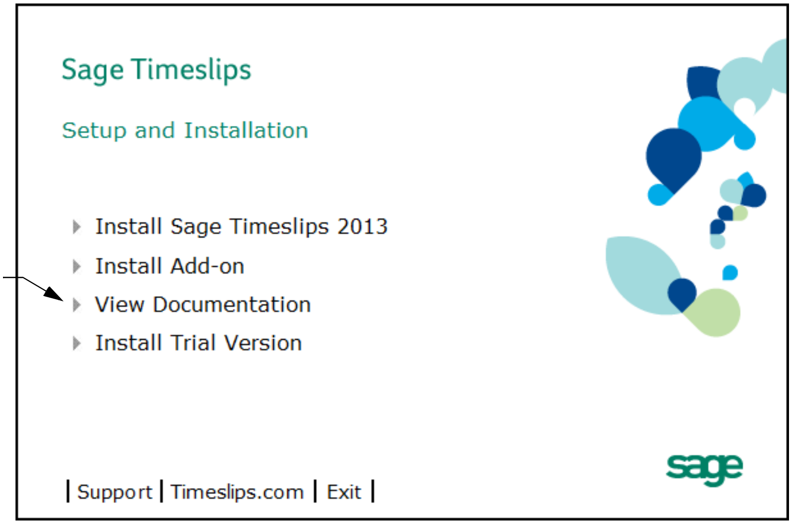
Other Reference Materials

Along with this upgrader's guide, Sage Timeslips offers extensive reference information in electronic format.

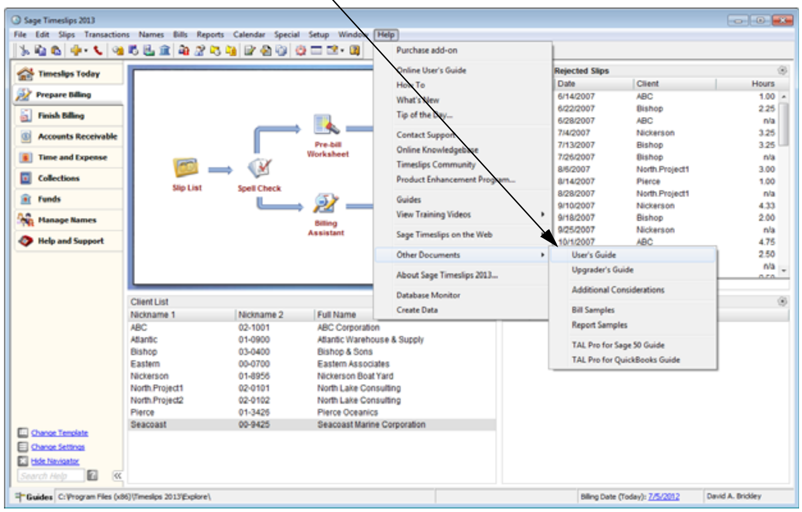
Additional PDF Files

Sage Timeslips provides additional guides in PDF format. Prior to installation, you can access these guides during installation. After installation, you can access these guides from the **Help; Other Documents** submenu.

You can access additional PDF files through the installation files.



You can access additional PDF files through the *Other Documents* submenu of the *Help* menu.



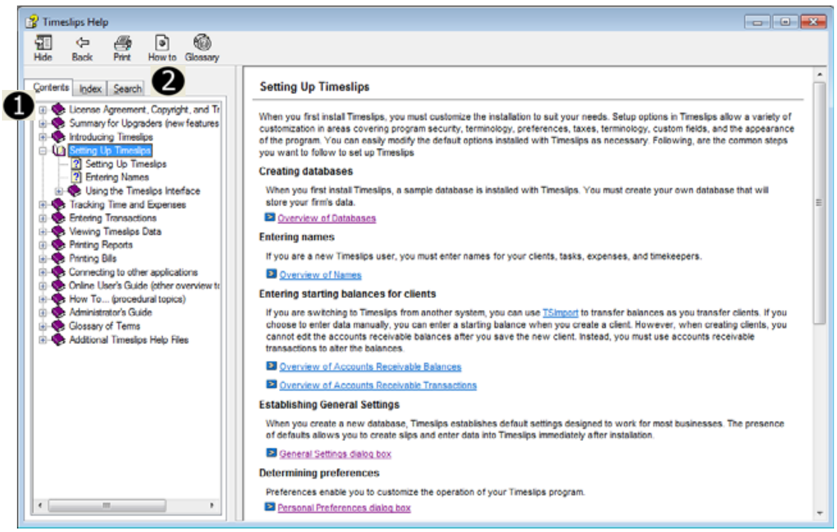
This submenu contains the following PDF files:

- **User's Guide** – Opens the user's guide for new users. This guide provides an overview of the major features of Sage Timeslips.
- **Upgrader's Guide** – Opens a copy of this upgrader's guide. This is useful if you want to print additional copies for other timekeepers.
- **Additional Considerations** – Opens a copy of the setup considerations. available during installation.
- **Bill Samples** – Opens the sample bills guide. This guide provides examples of how you can design bills for your firm.
- **Report Samples** – Opens the sample reports guide. This guide provides samples of all reports and examples of ways to customize reports.
- **TAL Pro for Sage 50** – Opens the setup guide for the Sage Timeslips link with Sage 50. This guide is available only from the **Help; Other Documents** submenu.
- **TAL Pro for Quickbooks** – Opens the setup guide for the Sage Timeslips link with Quickbooks. This guide is available only from the **Help; Other Documents** submenu.

Sage Timeslips Help System

The Sage Timeslips Help system provides detailed information about each feature, as well as overview information about how features interact with each other, and step-by-step topics.

To access the Sage Timeslips Help system, click the **Help** toolbar button, click a **Help** button, or press **F1** from any dialog box.



From the *Contents* page (1) open any book and choose a topic. Optionally use the *Index* or *Search* pages (2) to search for a topic.

Preparing to Upgrade

Because upgrading Sage Timeslips can involve some important decisions, we suggest that only the system administrator upgrade Sage Timeslips. Please review this entire section before attempting to upgrade Sage Timeslips.

Reviewing system requirements

Before upgrading Sage Timeslips, verify that your system meets the necessary hardware and software requirements. The following table lists the minimum and recommended requirements for using Sage Timeslips.

System Requirements and Recommendations

	Minimum	Recommended	Note
Operating system	Windows 7 Ultimate, Windows 7 Professional, Windows Vista Business, Windows Vista Ultimate, Windows XP SP3	Windows 7 Ultimate, Windows 7 Professional, Windows Vista Business, Windows Vista Ultimate, Windows XP SP3	See Microsoft's Web site or documentation for additional requirements.
Computer/ processor	PC with 500 MHz Intel Pentium, AMD, or compatible processor	PC with 1 GHz Intel Pentium, AMD, or compatible processor	Performance improves as CPU speed is increased.
RAM (Memory)	1 GB	2 GB or higher	Performance improves as the amount of RAM is increased, especially for your server station.
Free hard disk space	300 MB for installation (excluding your database)	300 MB for installation (excluding your database) 75 MB additionally required for your database 100 MB additionally recommended for files created over time (such as backup files, report files, PDFs of bills and reports, etc.)	Database growth and installation of Sage Timeslips Add-ons will require additional disk space.
Adobe Reader	Adobe Reader to review PDF files. (Adobe Reader X is included on the Sage Timeslips CD-ROM.) 25 MB hard disk space additionally required.	Adobe Reader X or higher to review PDF files. (Adobe Reader X is included on the Sage Timeslips CD-ROM.) 25 MB hard disk space additionally required.	See Adobe's Web site or documentation for additional requirements.
CD-ROM drive	CD-ROM drive	CD-ROM drive 4x or higher	Required for installation only
Display/Monitor	Super VGA or better resolution, supporting 1024x768, 256 colors, normal fonts	Super VGA or better resolution, supporting 1024x768 or higher, high color depth, normal fonts	
Peripherals	PC-compatible keyboard, mouse, printer 14.4 KBps modem if using the dialing features within Sage Timeslips. Scanning functionality in Slip Attachments and Document Access requires TWAIN-compatible scanner Internet connection required for using Sage Timeslips web features, such as eCenter.	PC-compatible keyboard, mouse, printer 56 KBps modem if using the dialing features within Sage Timeslips. Scanning functionality in Slip Attachments and Document Access requires TWAIN-compatible scanner High-speed Internet connection, if using Sage Timeslips web features, such as eCenter. Sound card and speakers for enhanced interaction.	Printing on both sides of paper requires duplex-compatible printer
Network connectivity	If using Sage Timeslips in a multiple-user environment, a network adapter appropriate to your type of network	A network adapter appropriate to your type of network.	Highest quality network hardware possible.
Miscellaneous	MAPI-compliant email program required for sending bills and statements by email, or reprinting bills to email. Microsoft Outlook 2010, 2007, or 2003 required on the Sage Timeslips workstation for using the Outlook Link, or receiving slips by email. Microsoft Word 2010, 2007, or 2003 required for merge functionality and viewing enhanced RTF Microsoft Excel 2010, 2007, or 2003 required for using the Print to Excel feature. Internet Explorer required to access web pages from Sage Timeslips.	MAPI-compliant email program required for sending bills and statements by email, or reprinting bills to email. Microsoft Outlook 2010, 2007, or 2003 required on the Sage Timeslips workstation for using the Outlook Link, or receiving slips by email. Microsoft Word 2010, 2007, or 2003 required for merge functionality and viewing enhanced RTF Microsoft Excel 2010, 2007, or 2003 required for using the Print to Excel feature. Internet Explorer required to access web pages from Sage Timeslips.	AOL® mail is not compatible with these features. AOL® mail is not compatible with these features.

Finding the serial number and configuration code

You will need your serial number and configuration code to install Sage Timeslips, register Sage Timeslips, and to receive technical support (if necessary). Sage sent this information to you in an email message shortly after you purchased your upgrade.

Preparing your database

Before upgrading your installation of Sage Timeslips, follow these procedures to prepare your Sage Timeslips data for conversion.

Making a Sage Timeslips backup

Help

See the online Help system of your current version of Timeslips for more info on creating backups.

Before starting the installation procedure or following any other instructions in this section, we recommend that upgraders create a backup of their Sage Timeslips database(s) to the hard drive. Backups are your best defense against problems with data.

When creating Sage Timeslips backups, use a unique name for backup files. For example, if today's date is December 01, 2012, you could name a backup file **UPGRADE-12012012.bku**. If your firm uses multiple databases, back up each one before upgrading Sage Timeslips. Provide a unique name for each backup file.

Chapter 2 of this guide "Converting Sage Timeslips Data" provides detailed information about converting your Sage Timeslips data.

Installing the latest Sage Timeslips service release

We may periodically provide updates for Sage Timeslips to address any known issues. Before upgrading, we suggest that you visit our web site to verify that you are using the latest Service Release.

For example, if you are upgrading from Timeslips 2011, verify that you are using the latest service release for Timeslips 2011.

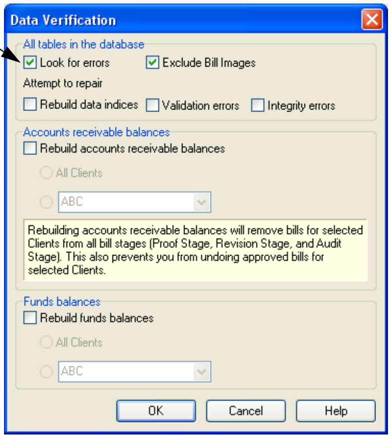
Within your current version of Sage Timeslips, you can check for an update. Select **Help; Sage Timeslips on the Web; Download Latest Update**. Sage Timeslips will open the appropriate page on our web site where you can download any necessary service releases. Review any information that accompanies the Sage Timeslips service release for additional installation instructions.

Verifying the integrity of your Sage Timeslips data

The Sage Timeslips data verification utilities, which are available in Timeslips v9 and later, allow you to check the structure and integrity of your Sage Timeslips database. In some cases, database errors might not display to Sage Timeslips users when data corruption is present. You can use these utilities to search for database errors before installing your Sage Timeslips upgrade.

Before installing Sage Timeslips 2013, make a backup in your current version (see "Making a Sage Timeslips backup" on page 6). Next, use the *Data Verification* dialog box (select **File; Data Verification**) in your current version to verify the integrity of your database. Mark only **Look for errors** and click **OK** to search for errors.

Choose to "Look for errors" and click **OK**.



If Sage Timeslips encounters any validation, linking, or integrity errors during the verification process, please contact the Technical Support department to evaluate and correct the errors before installing your upgrade. We do not suggest that you attempt to repair errors on your own.

Purging unnecessary data

Large databases can take additional time to convert. Before installing your Sage Timeslips upgrade, you can purge unneeded slips (which are slips that you no longer need to report on) from your current version of Timeslips. We suggest that you do not purge accounts receivable transactions because payment distribution data affects many reports.

You can find additional information about purging data in the online Help of your current version. Please remember to always make a backup before purging data.

Upgrading Sage Timeslips

The following sections provide detailed upgrade installation instructions.

Note

You can install Sage Timeslips in many network environments. Our online knowledgebase includes detailed installation instructions for some of these specific network environments. Within Sage Timeslips, select **Help; Online Knowledgebase** to see if we have installation instructions for your environment.

Downloading the installation file

When you purchased the Sage Timeslips 2013 upgrade, Sage sent you an email message that contained your serial number and configuration code, along with a link to download the installation file.

You must download the installation file (**SageTimeslips2013.exe**) to follow the instructions below.

Installing the upgrade

How to Install the Sage Timeslips upgrade

1 Start Windows. If any other applications are open, please close them now.

You must log into Windows with administrator rights to install Sage Timeslips. However, you do not need administrator rights to use Sage Timeslips.

2 Start the Sage Timeslips installation by double-clicking on the Sage Timeslips download file. This file is named **SageTimeslips2013.exe**. The download file will extract the necessary installation file and will open a menu of options.

3 Click **Install Sage Timeslips 2013**. The *Welcome to Sage Timeslips Setup* view opens.

4 Click **Next** to continue the installation procedure. The *Software License Agreement* view opens.

5 Installing Sage Timeslips indicates that you agree to the terms of the Software License Agreement. After reading this agreement, select **I accept the terms of the license agreement** if you agree to the terms and then click **Next**. The *Enter Configuration Code* view opens.

6 You must enter a valid configuration code to install Sage Timeslips. Sage sent this code to you shortly after you purchased the upgrade. After entering the configuration code, click **Next**.

7 Verify that the Sage Timeslips configuration settings correspond to the configuration code that you entered. If the configuration settings are correct, click **Next**, otherwise click **Back** to re-enter your code.

8 On the *Select the Destination Folder* view, select the folder where you want to install the Sage Timeslips upgrade. You should install Sage Timeslips 2013 over your previous version of Timeslips.

If you are upgrading a network installation, first install Sage Timeslips 2013 to the Sage Timeslips server. After completing the installation on the server, you can then install the upgrade on local workstations (see "Installing Sage Timeslips locally" on page 10 for these steps).

All network users must have Change file rights (Read, Write, Execute, and Delete) for the installation folder in order to install or use Sage Timeslips.

After selecting the appropriate drive and folder, click **Next** to continue.

9 Select the type of installation that you want the Setup program to perform. We recommend that you perform a **Complete** installation. Performing a **Custom** installation may omit some components.

Click **Next** to continue. The *User Information* view opens.

10 Enter your user name, company name, and Sage Timeslips serial number in the corresponding fields of the *User Informatio*n view. Your Sage Timeslips serial number is located on the Configuration Codes sheet. After entering the appropriate information in the corresponding fields, click **Next** to continue.

11 The Setup program is ready to install Sage Timeslips on your workstation or network drive. If you want to change any of the Setup program settings, click **Back**. Otherwise, click **Install** to begin installing Sage Timeslips.

After copying the necessary program files to your computer, the *Select Program Folder* view opens.

12 Select the program folder where you want to create Sage Timeslips shortcuts. Click **Next** to continue.

13 Sage Timeslips completes the installation procedure. Choose additional options (creating desktop shortcut, installing Adobe Reader, reviewing the readme document, or checking for program updates) and click **Finish**.

Installing additional licenses and other add-ons

Note: In a multi-user environment, install add-ons before installing Sage Timeslips locally.

You can enhance Sage Timeslips by purchasing additional products, station licenses, or functionality called Sage Timeslips *add-ons*. You can install add-ons directly from the Sage Timeslips installation CD-ROM.

How to install Sage Timeslips Add-Ons

1. Within Sage Timeslips, select **Help; Purchase Add-on**.
2. Enter the configuration code for your Sage Timeslips Add-On product. This configuration code was sent to you in an email message. Click **Next**.
3. Verify that the configuration code corresponds to the Sage Timeslips Add-On feature that you want to install.

   If the configuration settings are incorrect, click **Back** to re-enter the configuration code; otherwise, click **Next** to continue.
4. Sage Timeslips will indicate when your installation is updated. Click **Done**.

Installing Sage Timeslips locally

After installing Sage Timeslips on a network drive (on the Sage Timeslips Server), you can quickly update each workstation that has Sage Timeslips installed already by opening Sage Timeslips. When you launch Sage Timeslips on each workstation and the upgrade process will begin automatically.

To install Timeslips on additional workstations, follow the steps below. The local installer copies Sage Timeslips program files from the Sage Timeslips Server to a network workstation. This allows users to run the Sage Timeslips from their workstations while sharing a database on the Sage Timeslips Server.

How to locally install Sage Timeslips on your network workstation

1. Map the new workstation to the appropriate folder on the Sage Timeslips Server.
2. At the network workstation, start Windows. If any other applications are open, close them now.
3. From the Windows taskbar, select **Start; Run** and click **Browse**. Select **Setup.exe** within the **Loclinst** folder (**Timeslips\Loclinst** on the Sage Timeslips Server, by default). Click **OK**. The *Welcome to the Sage Timeslips Local Installer* view opens.

   Click **Next** to continue. The *Select Installation or Update* view opens.

4 Select the type of local installation to run on the current workstation.

- **Install**: Click this button if you are installing Sage Timeslips on this workstation for the first time. The *Select Installation Type* view opens (see step 5).
- **Update**: If Sage Timeslips is already installed on this workstation, click this button to verify that the latest Sage Timeslips program files are installed. The *Ready to Install Sage Timeslips* view opens (see step 7).

5 Select the type of installation that you want the Setup program to perform. We recommend that you perform a **Complete** installation. Performing a **Custom** installation may omit some components.

Click **Next** to continue. The *Select the Destination Folder* view opens.

6 Select the local folder where you want to install your Sage Timeslips program files. By default, the Setup program installs Sage Timeslips in the **C:\Program Files\Timeslips** folder.

If necessary, click **Browse** to select a different location. After selecting the appropriate drive and folder, click **Next** to continue the installation procedure. The *Ready to Install Sage Timeslips* view opens.

7 The Setup program is ready to install Sage Timeslips on your workstation. If you want to change any of the Setup programs settings, click **Back**. If you want to begin installing the Sage Timeslips program files, click **Next**.

After copying the necessary program files to your computer, the *Select Program Folder* view opens.

8 Select the program folder where you want the Setup program to create your Sage Timeslips shortcuts. After selecting the appropriate program folder, click **Next** to continue.

9 Sage Timeslips completes the installation procedure. Choose additional options (creating desktop shortcut, installing Adobe Reader, reviewing the readme document, or checking for program updates) and click **Finish**.

Converting Sage Timeslips data

After upgrading your Sage Timeslips installation, you must convert your Sage Timeslips database for use with Sage Timeslips 2013.

The procedure for converting your data depends upon the version of Timeslips that you are upgrading. See Chapter 2, “Converting Sage Timeslips Data” for additional information about converting your current Timeslips database.

Registering Sage Timeslips

When you run Sage Timeslips, you may be presented with a screen containing instructions for registering your software. If Sage Timeslips prompts you to register, follow the onscreen instructions to register. If you choose not to register at that time, you will be allowed to use Sage Timeslips for 30 days, before you must register the program.

After 30 days from your first use of Sage Timeslips, if you have not yet registered the program, you will be required to register the program. You will not be able to use Sage Timeslips until you register the program.

Getting the Latest Release

We may occasionally issue a Service Release (SR) for Sage Timeslips. We recommend that you periodically check to ensure you are using the most up-to-date release.

Within Sage Timeslips, select **Help; Timeslips on the Web; Download Latest Update**.

Converting Sage Timeslips Data

2

• Converting Your Data

Overview

After completing the upgrade process, as described in "Upgrading Sage Timeslips" on page 8, you must convert your database before you can use it with Sage Timeslips 2013.

Because converting Sage Timeslips data can involve some important decisions, we suggest that only the system administrator convert Sage Timeslips databases.

Note

The conversion process may take an extended period of time. If your database is very large, the conversion process can be over an hour. Please consider this when choosing a time to convert your database.

Converting data located on file servers

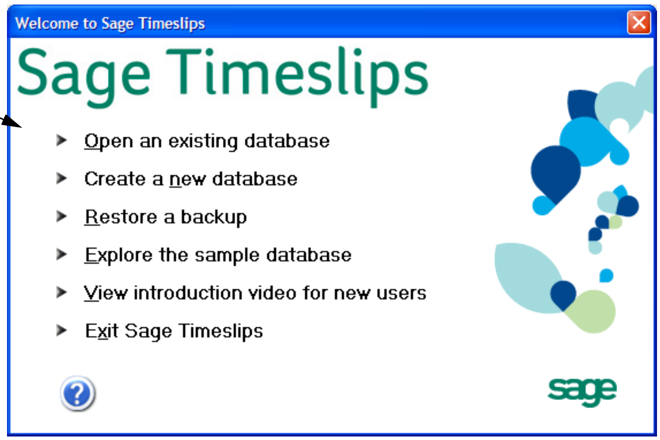
If your firm stores the Sage Timeslips database on a file server that is separate from all workstations, we recommend that you copy your database to a local folder before converting it:

1. verify that no one is accessing Sage Timeslips
2. copy the Sage Timeslips database folder from the file server to a local drive
3. open the local copy of your Sage Timeslips database to begin the conversion process
4. after completing the conversion process, copy the database folder from the local drive back to the file server

Converting from Sage Timeslips v9 and Later

After upgrading your Sage Timeslips installation, Sage Timeslips will convert your current database. If Sage Timeslips cannot locate your database, the *Welcome to Sage Timeslips* dialog box opens.

Select **Open an existing database** and select a database to convert.



When you open a database created with Timeslips v9 through Timeslips 2012, Sage Timeslips will automatically convert the database for use with Sage Timeslips 2013.

You must back up your Timeslips database before you can convert it. After converting the database to Sage Timeslips 2013 format, you cannot open it with previous versions of Timeslips.

Migrating MSSQL and MSDE databases

Sage Timeslips no longer supports the use of MSSQL or MSDE databases. If you attempt to open an MSSQL or MSDE database, Sage Timeslips will prompt you to migrate that database to Paradox format.

How to migrate an MSSQL or MSDE database

Before migrating a database for use with Sage Timeslips 2013, we suggest that you have your database administrator create a backup of the database.

1. After upgrading your installation to Sage Timeslips 2013, open any MSSQL or MSDE database created with Sage Timeslips.
2. Sage Timeslips displays a message indicating MSSQL and MSDE are no longer supported. Click **Continue** to continue the migration process.

3 When Sage Timeslips migrates data, it creates a new database in the appropriate format. Sage Timeslips must create this database in an empty folder.

Enter the new location of your Sage Timeslips database and click **Save**. For example, if you use Sage Timeslips in a multiple-station, network environment, you should save the new database in a folder that all Sage Timeslips users can access.

4 The Sage Timeslips Migration Utility begins migrating data. When the utility indicates that the migration process is complete, click **OK**.

5 After migrating your data, Sage Timeslips will prompt you to convert your database. Click **Yes** to convert the database.

6 Sage Timeslips prompts you to make a backup of the database before converting it. We strongly suggest that you create a backup at this time. Sage Timeslips 2013 will not be able to restore backups created from databases in MSDE or MSSQL format. Click **Yes** to create the backup file, select a location for the backup file, and click **Save**.

7 Sage Timeslips completes the conversion process. Click **OK**. Sage Timeslips will open the new database.

Converting client email addresses

Sage Timeslips uses email addresses when sending bills by email, reprinting bills to email, sending statements by email, and creating Outlook records.

For more information on these features, view the following index keywords in the Sage Timeslips online Help system: “**sending bills to clients by email**,” “**reprinting bills:to email**,” “**sending statements to clients by email**,” and “**overview of the Outlook link**.”

Because some previous versions of Timeslips did not provide a field to store client email addresses, you may have used one of the phone number fields on the *General* page of the *Client Information* dialog box to store this information.

When converting databases, Sage Timeslips reviews the phone number fields to determine if one has been renamed to include the terms “e-mail” or “email.” If Sage Timeslips finds an appropriately renamed field, it will then review the contents of the field for each client. When it finds valid email addresses in the renamed field, it will copy the contents to the new *Email Address* field.

Converting bill and statement format settings

When you upgrade from Sage Timeslips v9 through Sage Timeslips 2004, the conversion process converts bill format templates into bill layouts and automatically assigns them to clients.

For example, if you use two different sets of bill format settings for your clients in Sage Timeslips v11, the conversion process creates bill layouts based on these settings and the settings in the bill layout template file. This process names the new bill layouts **Layout0001** and **Layout0002**. It automatically assigns the appropriate bill layout to each client. You can change the name and details of bill layouts at any time.

Sage Timeslips also creates and assigns statement layouts based on your statement configurations. Sage Timeslips names these templates **Layout01**, **Layout02**, etc.

For more information on bill and statement layouts, view the following index keywords in the Sage Timeslips online Help system: “**designing layouts:bill layouts”** and “**designing layouts:statement layouts”**

Converting from Sage Timeslips v8 or Earlier

If you are upgrading from Timeslips v8 or an earlier version, we recommend that you contact our customer support department for information on converting your database.

Converting data from Timeslips v8 or an earlier version is a two-part process.

- The first part makes a copy of your Timeslips data (please note that your original Timeslips data will not be affected.) This step converts your data from 16-bit format to 32-bit format and places it in a new folder (such as Data01 or Data02).

  During this part of conversion, Sage Timeslips will ask a series of questions that will determine how to store data types that have changed in the newer version.

- The second part of the conversion process will convert your Sage Timeslips for use with the latest version of Sage Timeslips.

Sage Timeslips 2013

3

• Sage Timeslips 2013 •

New Features in Sage Timeslips 2013

This chapter details the new features added in Sage Timeslips 2013.

Help

For a comprehensive list of all changes to Sage Timeslips, select **Help; What's New**. This topic discusses new features and changes for each past version.

How to find more information about each feature

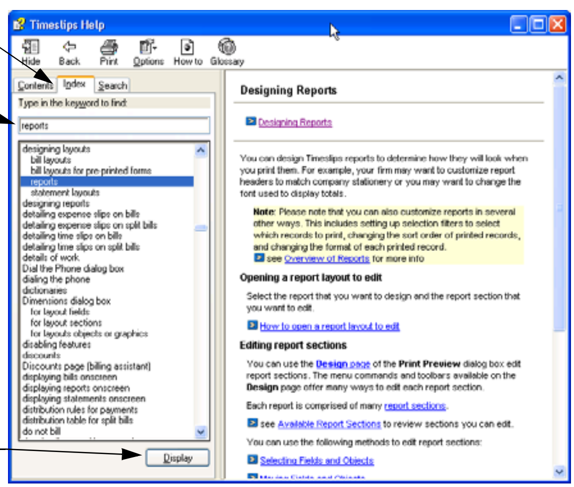
Throughout this guide, we provide index keywords that direct you to comprehensive information available within the online Help.

To find the additional Help information:

1 Within Sage Timeslips 2013, select **Help; Online User's Guide**.

2 Switch to the **Index** tab of the *Sage Timeslips Help* dialog box.

3 Enter the index keyword. For example, to find more information about designing reports, look up **designing layouts** and choose **reports**.

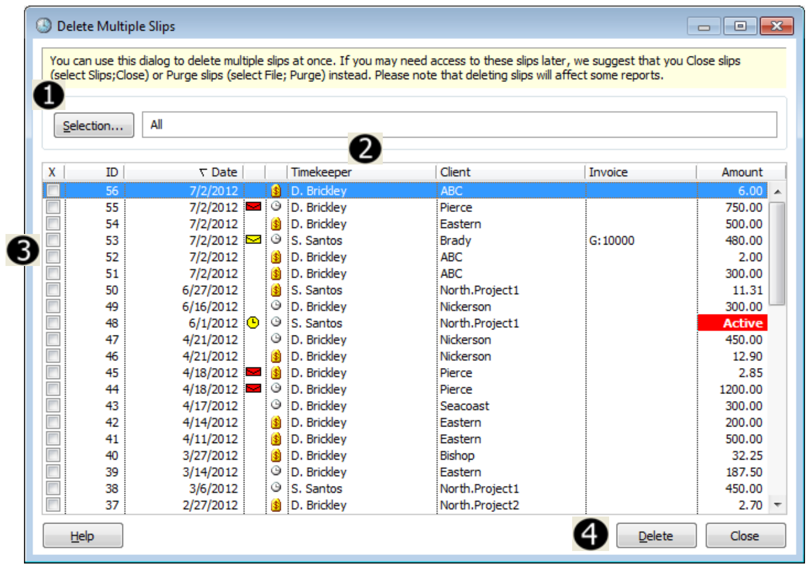


4 Click **Display** to display the Help topic.

Working with Slips

Deleting Multiple Slips

When maintaining slips, you can now delete many slips at once. Select **Slips; Delete Multiple Slips** to start this process.

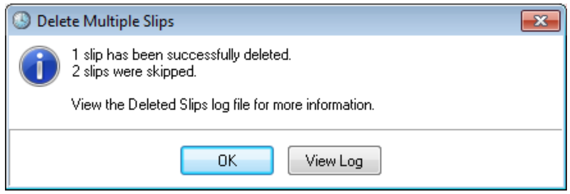


Within the *Delete Multiple Slips* dialog box:

1. Click the **Selection** button to optionally filter the slips displayed in the list.
2. Click on a column heading to optionally sort the list by that field.
3. Mark the slips that you want to delete.
4. Click **Delete** to delete the marked slips.

Before deleting slips, Sage Timeslips prompts you to back up your database. We suggest that you back up at this time.

After deleting slips, Sage Timeslips indicates if all slips were deleted successfully. For example, you may be prevented from deleting slips with an active timer or slips that were on a bill that can still be undone.

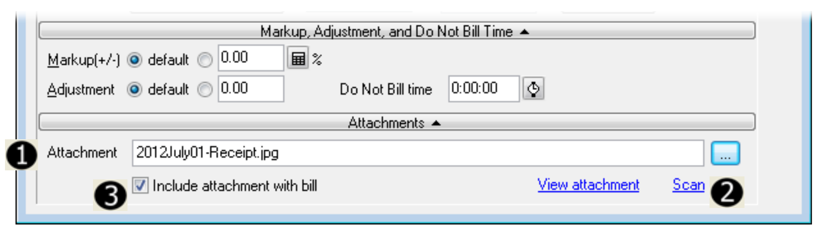


Click **View Log** to view the details if some slips were skipped.

For more information on this process, look up "**deleting multiple slips**" in the Sage Timeslips Help index.

Attaching Files to Slips

On the *Slip Entry* dialog box, you can now attach files such as receipt images to slips.



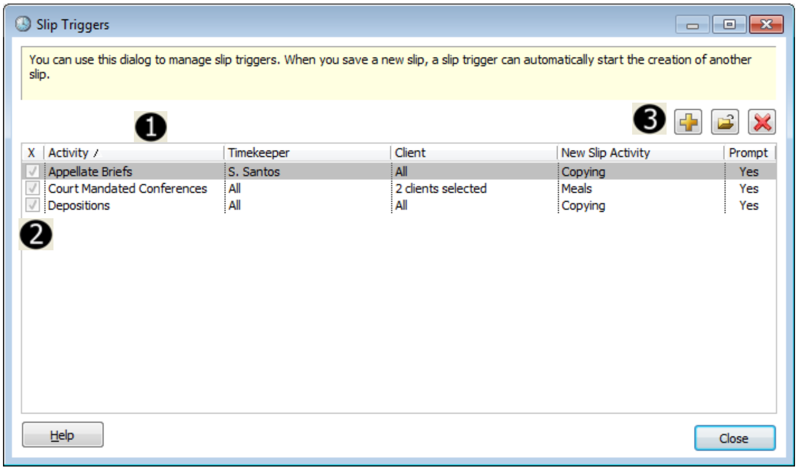
When viewing a slip:

1. You can type in the location and name of a file to attach, or you can click **Browse** [...] to select a file.
2. If you don't have the file already saved, you can click **Scan** to scan a new image.
3. You can optionally mark **Include attachment with bill** to include the attachment with emailed bills. You can also include some image files with printed bills.

For more information on slip attachments, look up "**attaching files to slips**" in the Sage Timeslips Help index.

Triggering Slips

When you save a new slip, Sage Timeslips can now start creating another new slip. Select **Slips; Slip Triggers** to open the *Slip Triggers* dialog box where you can set up rules to control this process.

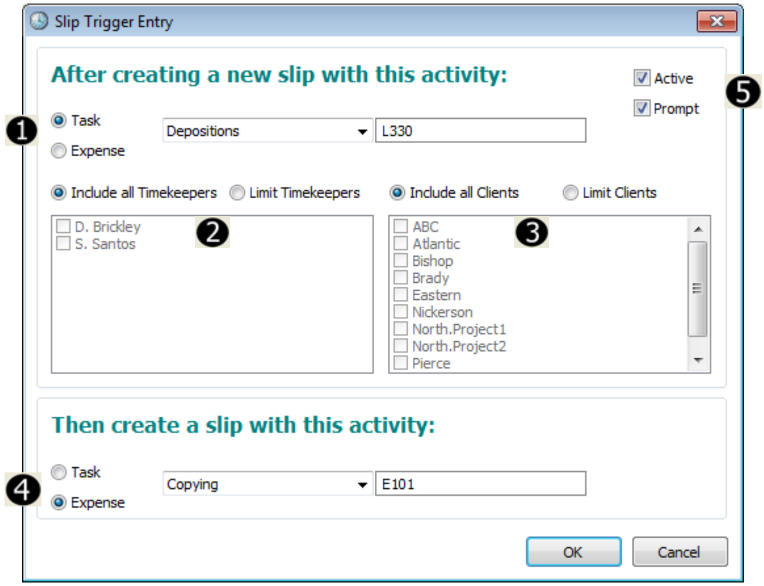


The *Slip Triggers* dialog box list all the current trigger rules. From here you can:

1 Click on column headings to quickly change the sort order of trigger rules.

2 Mark or unmark trigger rules to indicate if they are active or inactive.

3 Use the tools in the upper right to add, edit, or delete trigger rules.



When adding a trigger rule:

1 Choose a task or expense. When you save a new slip with this task or expense, Sage Timeslips can start creating another new slip with the activity listed below (4).

2 Choose the timekeepers that this trigger rule applies to.

3 Choose the clients that this trigger rule applies to.

4 Choose the activity that will be copied onto the new slip.

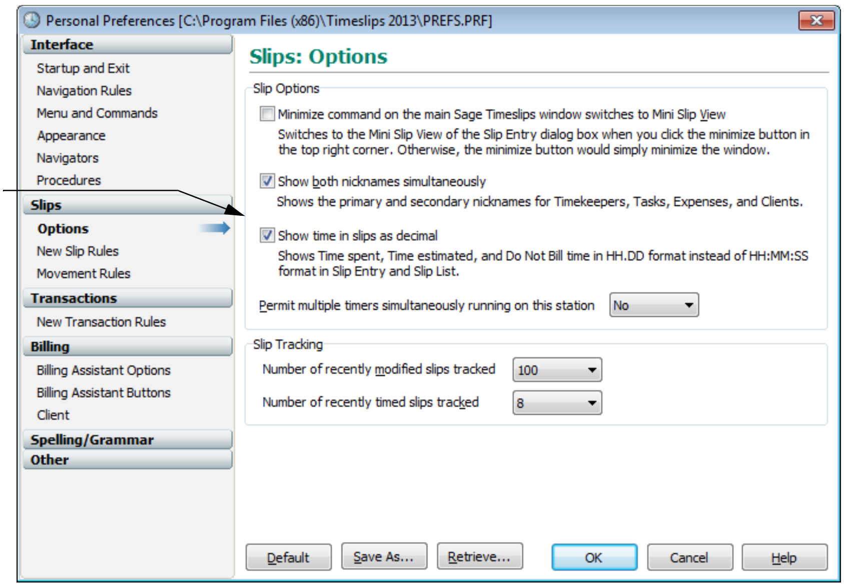
5 Indicate if this trigger rule is active and if Sage Timeslips will prompt you to create the new slip (or if it the creation process will happen automatically).

Choosing Time Format on Slips

You can now display hourly values in decimal format on HH:MM:SS format on the Slip List or Slip Entry.

Select **Setup; Preferences** and then choose **Slips: Options** from the left side to access this new preference.

Choose the format of time values in Slip Entry or the Slip List.



Mark *Show time in slips as decimal* to show time in decimal format. For example two and a half hours will display as **2.5**.

Unmark *Show time in slips as decimal* to show time in HH:MM:SS format. For example two and a half hours will display as **2:30:00**.

Help

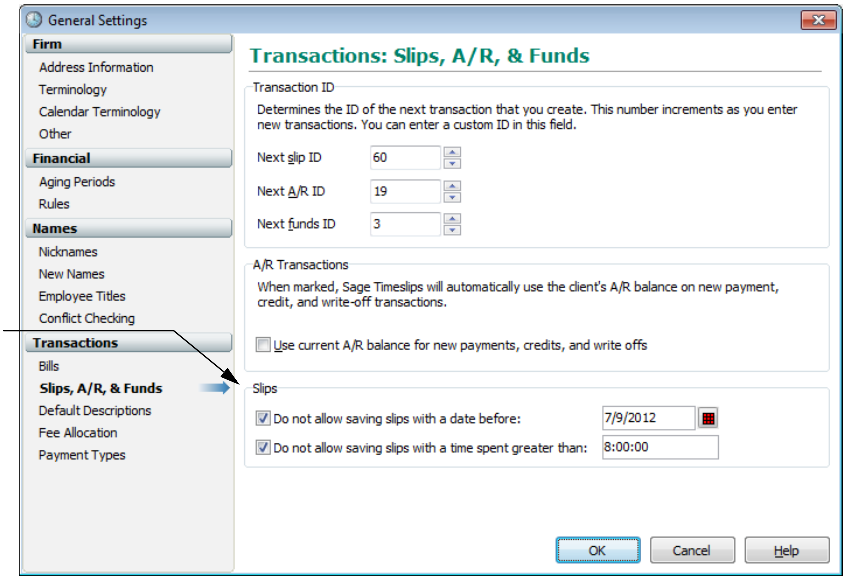
For more information on setting up preferences, look up "**preferences**" in the Sage Timeslips Help index.

Restricting Slip Entry

You can now restrict slip entry for dates that have passed or for large time values.

Select **Setup; General** and then choose **Slips, A/R & Funds** from the left side to access these new settings.

Choose if you want to restrict slip entry for all timekeepers.



There are also new security rights that determine if Sage Timeslips will warn you if you violate these restrictions or prevent you from saving the slip.

Select **Setup; Security; Profiles** and then switch to the *Slip* area to access these new rights.

Choose if you want to prevent slip entry if slips violate restrictions.

Restricting slips by date

To **restrict** slips by date, in General Settings mark *Do not allow saving slips with a date before* and then enter a date. Please note that the date you enter can be a relative date. For example, you can set up a relative rule to the first of the month, so then the date updates automatically each month.

> When you enter slips, if the slip date is before the date entered in General Settings, Sage Timeslips will warn you when you save the slip so you are alerted to the restriction, but you can continue saving the slip.

To **prevent** slips by date, change the settings as indicated above, but also set up security. Go to the *Slip* area and unmark *Allow slip creation on restricted date*.

> When you enter slips, if the slip date is before the date entered in General Settings, Sage Timeslips will warn you when you attempt to save the slip and you will not be able to save the slip unless you change the date.

Restricting slips by time spent

To **restrict** slips by time spent, in General Settings mark *Do not allow saving slips with a time spent greater than* and then enter a time value.

> When you enter slips, if the slip's time spent is more than the value entered in General Settings, Sage Timeslips will warn you when you save the slip so you are alerted to the restriction, but you can continue saving the slip.

To **prevent** slips by date, change the settings as indicated above, but also set up security. Go to the *Slip* area and unmark *Allow slip creation on restricted time spent*.

> When you enter slips, if the slip's time spent is more than the value entered in General Settings, Sage Timeslips will warn you when you attempt to save the slip and you will not be able to save the slip unless you change the time spent.

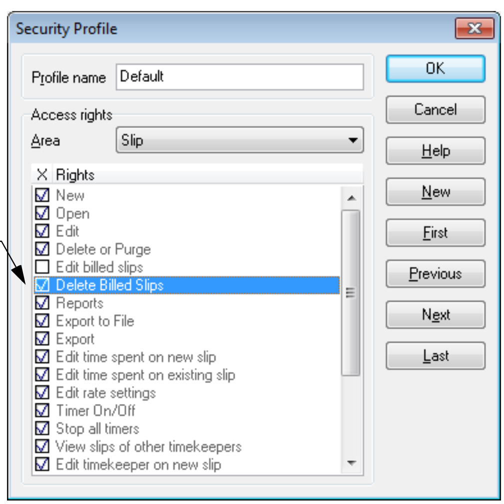
Help

For more information on these restrictions, look up "**restricting slip entry**" in the Sage Timeslips Help index.

Preventing deleting billed slips

You can now set up security to prevent users from deleting billed slips.

Select **Setup; Security; Profiles** and then switch to the *Slip* area to access this new right.



You can allow or prevent users from deleting billed slips.

Help

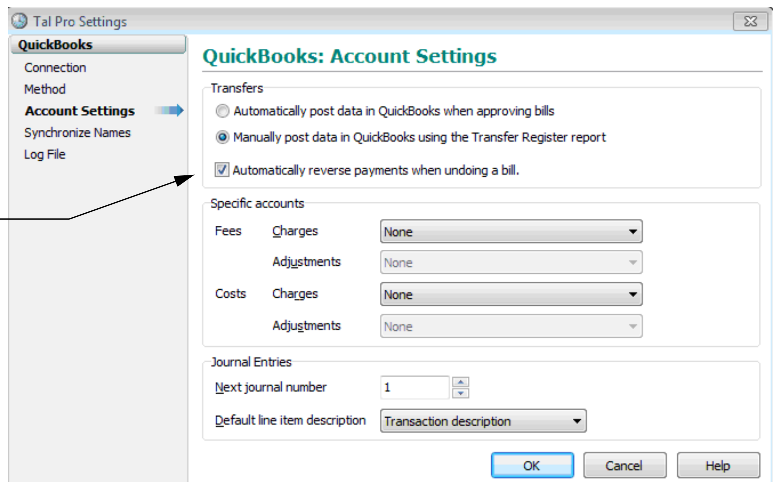
For more information on security, look up "**security rights**" in the Sage Timeslips Help index.

Working with Transactions

Undoing bills when using TAL Pro

When using TAL Pro to link to Sage 50 or QuickBooks, you can transfer transaction details (such as invoices and payments) from Sage Timeslips to your General Ledger. When you undo a bill, Sage Timeslips sends reversing entries to your General Ledger.

You can now control if Sage Timeslips will reverse payments when you undo bills.



Choose if Sage Timeslips will reverse payments when undoing bills.

Help

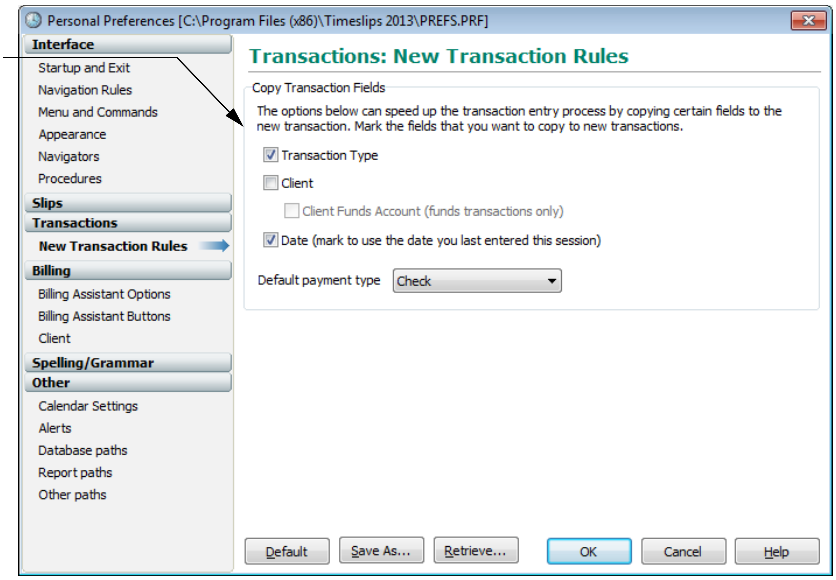
For more information on linking with TAL Pro, look up "**TAL Pro**" in the Sage Timeslips Help index.

Choosing transaction defaults

If you enter transactions in batch, you can now control how transaction fields are populated with default values.

Select **Setup; Preferences** and then choose **Transactions: New Transaction Rules** from the left side to access this new preference.

Choose which fields will use a default value.



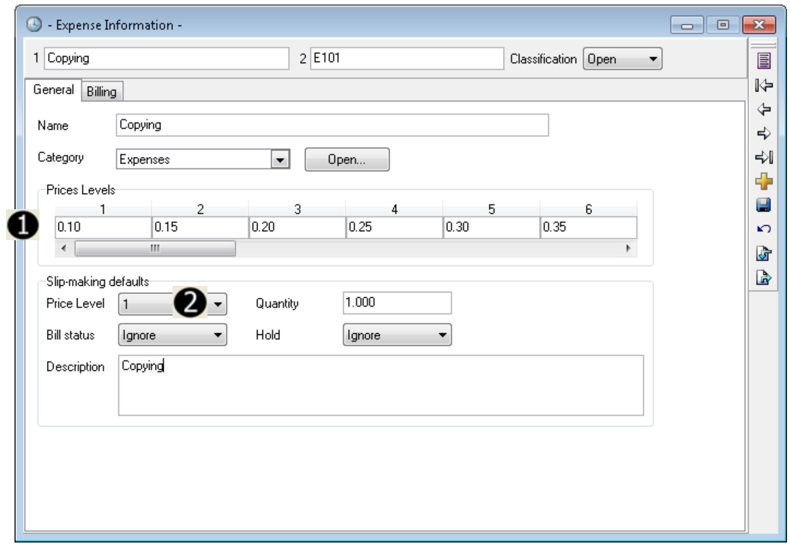
Mark the transaction fields that you want to be copied from the current transaction to a new transaction.

For more information on setting up preferences, look up "**preferences**" in the Sage Timeslips Help index.

Working with Names

Multiple prices on expenses

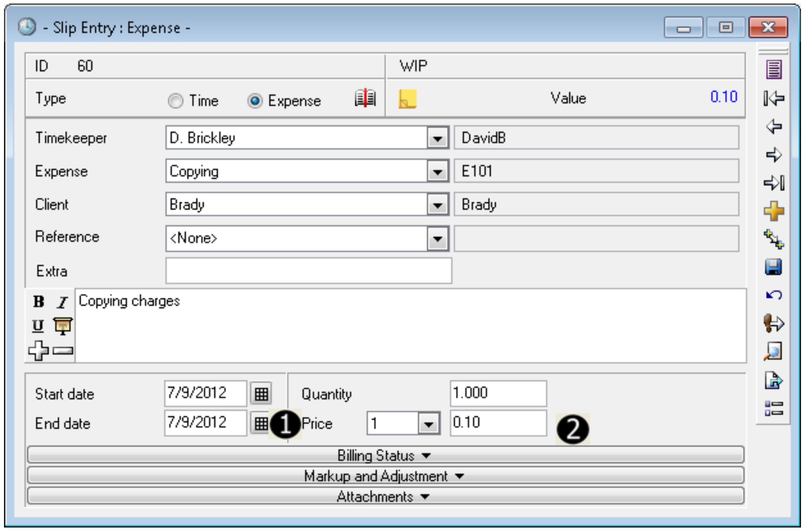
Each expense can now store up to twenty prices. You can set up these prices on the *Expense Information* dialog box.



1 Enter up to twenty different prices for the expense

2 Indicate which price is the default for this expense.

When selecting the expense on a slip, you can then choose which price to use on this slip.



1 Select a Price level from the list.

2 The associated Price value will be copied to the field. You can also manually enter a Price if needed.


Help

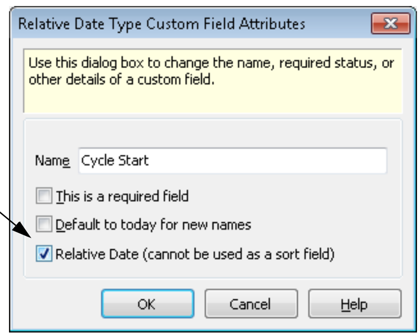
For more information on expense prices, look up “**price on expense slips**” in the Sage Timeslips Help index.

Custom date fields can use relative dates

When tracking dates for clients, timekeepers, or activities, you can now use relative dates.

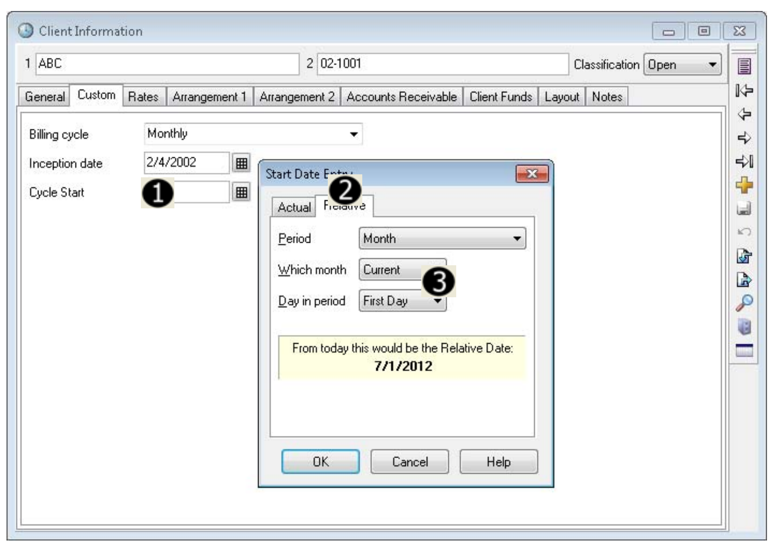
Select **Setup; Custom Fields** to edit a custom field. Double click on a date custom field to change its attributes. Mark *Relative Date* if you want to use relative dates with this field.

You can now use relative dates.



When a custom date field is marked to use relative dates, you can set its value to relative date.

To assign a relative date:
1) Click the Calendar icon
2) Switch to the Relative tab,
3) set up the relative rule.

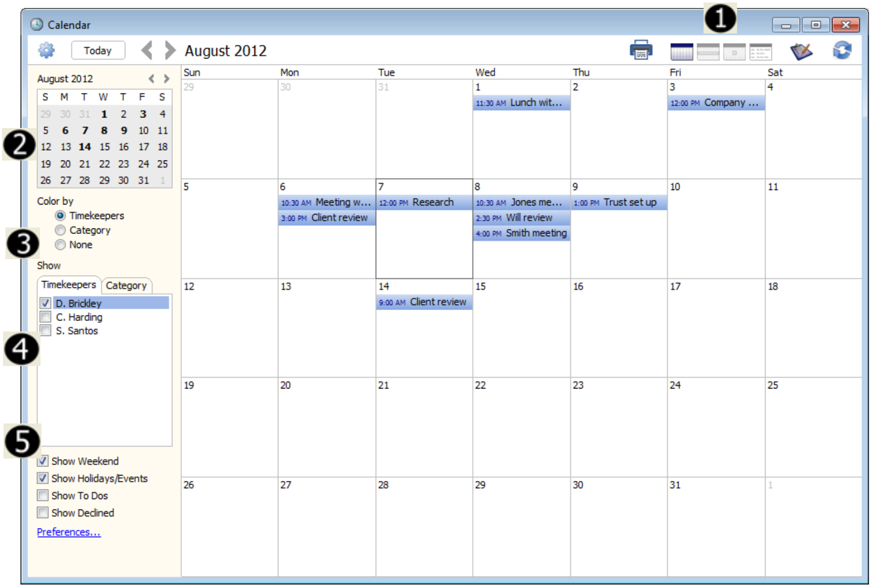


For more information on custom fields, look up "**custom fields**" in the Sage Timeslips Help index.

Working with Calendars

You can now track appointments, events, and to do items with an integrated calendar.

Select **Calendar; View Calendar** to open your calendar.



There are several controls at the top and to the left of the calendar you can use to work with the calendar:

1. Each calendar has four views to display entries. Use these buttons at the top of the calendar to change views:

   Month view, Week view, Day view, List view

2. Use the Mini Calendar to quickly view other dates. Then you can click on another date to move to it.

3. Use the *Color by* field to color entries on the calendar by timekeeper or by category

4. Use the *Show entries for* list to show or hide entries for specific timekeepers or categories

5. Use the other *Show* options to further filter which entries display on the calendar

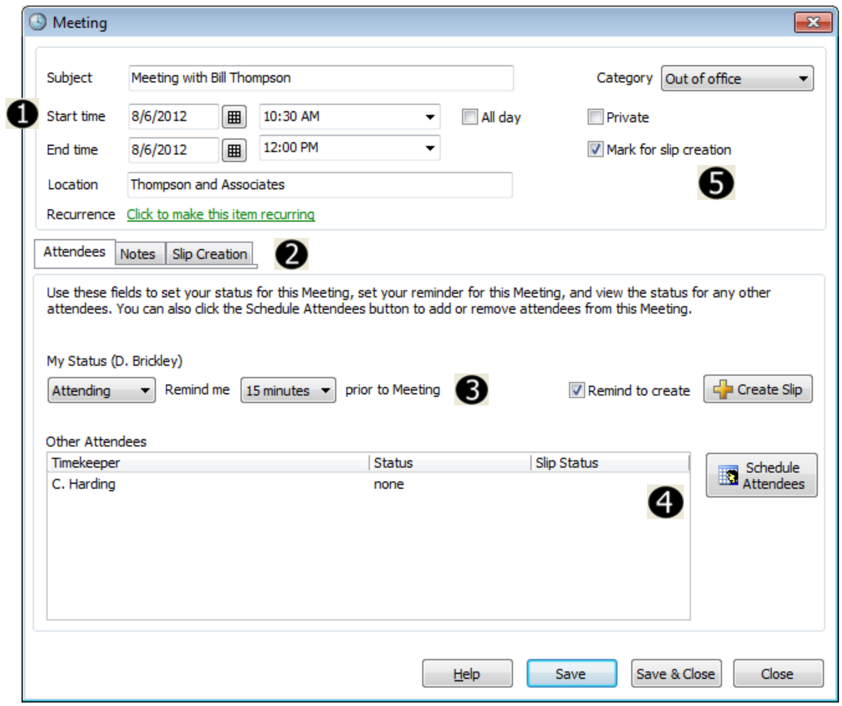
Help

For more information on calendar entries, look up "**calendar**" in the Sage Timeslips Help index.

Creating new entries

To create a new entry, open the *Calendar* menu and select **New Meeting, New Holiday/Event**, or **New All Day Holiday/Event.**

You can also double click on an empty cell to create a new meeting for that day and time.



When creating a meeting:

1 The fields at the top of the meeting contain general information, like the subject, time, and date of the meeting.

2 The fields on the bottom of the meeting contain three groups of fields that let you invite attendees, enter notes, and set slip creation defaults.

3 On the Attendees tab you can set your attendance status and set up a reminder.

4 On the Attendees tab you can invite other timekeepers to the meeting and view their attendance status.

5 You can mark an entry for slip creation. When that entry is complete, you can create a new slip based on its details.

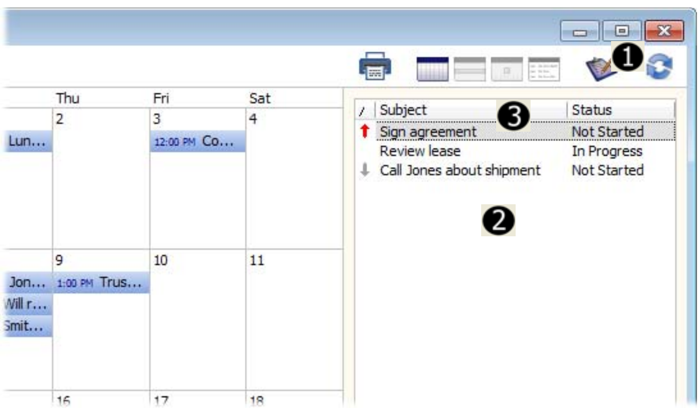
Editing entries

You can change the date and time of an entry quickly. Simply click on the entry and drag it to another date or time.

To view or change other details for an entry, you can double click on it to access its details.

Managing to do items

Each timekeeper can maintain a private to do list.



1 Click  from the top of the calendar to show or hide your To Do list.

2 Right click on the To Do list and select **New** to create a new To Do entry.

3 Right click on the To Do list and select **Third Column** to determine which to do field displays in the third column of the list. Click on any column heading to sort the list by that column.

Working with Reports

Days to Pay report

You can now print a report that forecasts the number of days that it takes clients to pay their bills.

Select **Reports; A/R Transactions** to open the list of A/R transaction reports. The Days to Pay report is listed in this group of reports.

6/7/2012 Willis & Henderson
3:00 PM Days To Pay Page 1

Selection Criteria

Clie.Classification Open
Clie.Controller Include: Brady, T

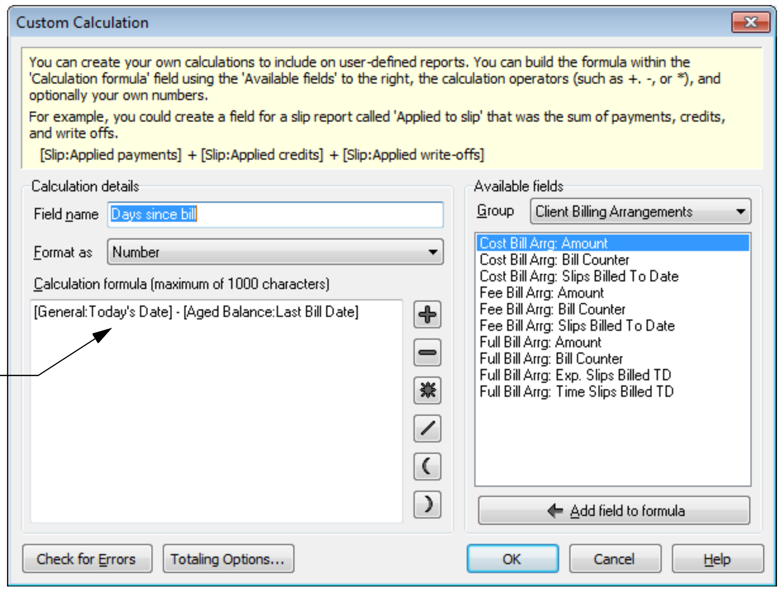
Client / Phone		Balance	Last Unpaid Invoice Date	Days Until Payment	Last Payment Date	Last Payment Amount	Average Days to Pay
Austin, F	(781) 555-1234	$725.00	12/6/2011	-50	10/20/2011	$750.00	134
Ball, M	(508) 555-2345	$525.00	5/22/2012	35	1/10/2011	$900.00	51
Barnes, M	(404) 555-9876	$75.00	5/22/2012	12	3/18/2005	$611.00	28
Barron, E	(978) 555-1212	$1,411.56	5/22/2012	42	3/16/2011	$1,600.00	58
Finch, J	(678) 555-8888	$1,958.80	5/22/2012	-5	2/15/2011	$600.00	11
Fitzgerald, I	(303) 555-5432	$59.86	5/22/2012	4	7/10/2011	$750.00	20
Gould, L	(212) 555-4545	$3,652.72	5/22/2012	16	4/26/2005	$1,141.50	32
Guzman, R	(333) 555-3333	$625.00	5/22/2012	30	2/4/2011	$200.00	46
Hoover, S	(413) 555-2890	$856.25	5/22/2012	28	3/18/2011	$700.00	44
Ingram, D	(781) 555-2056	$16.00	5/22/2012	-6	11/4/2011	$650.00	10
Kirby, R	(978) 555-5768	$917.76	5/22/2012	12	4/2/2011	$1,000.00	28
Mckay, J	(781) 555-3344	$3,280.68	5/22/2012	73	10/24/2011	$11,200.00	89
Neal, E	(888) 555-8888	$14.00	5/22/2012	12	10/8/2011	$400.00	28
Ross, W	(456) 555-1654	$60.00	5/22/2012	17	8/1/2011	$525.00	33
Grand Total		$14,177.63					

This report is fully customizable using the report designer. You can add more fields to the report or delete any field. Using report options, you can exclude clients that have a zero balance.

For more information on this report, look up "**days to pay report**" in the Sage Timeslips Help index.

Using dates in calculations

When designing user defined reports you can create your own custom calculations that can appear on the report. You can now use date fields within those calculations.

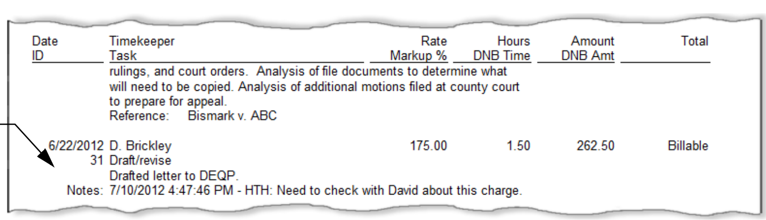


You can now use date fields in calculations.

For more information on calculations, look up "**calculations**" in the Sage Timeslips Help index.

Slip notes on pre-bill worksheets

When printing pre-bill worksheets, you can now include slip notes for each slip. Before printing the worksheet, open the *Report Options* dialog box and mark **Slip notes.**



You can show slip notes for each slip.

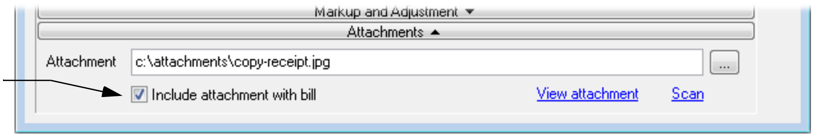
For more information on slip notes, look up "**slip notes**" in the Sage Timeslips Help index.

Working with Bills

Including file attachments with bills

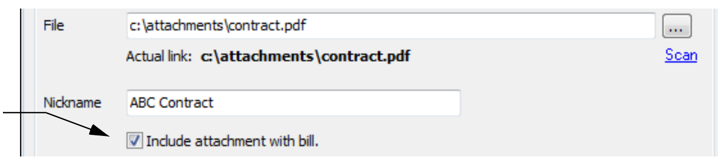
On the *Slip Entry* dialog box, when you attach a file to a slip you can mark the attachment to be included with bills.

You can mark slip attachments to be included with bills.

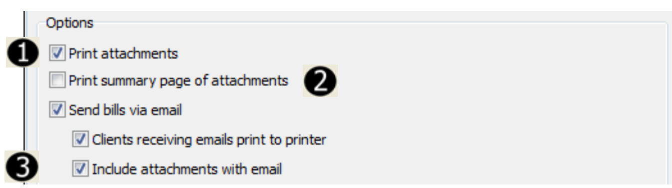


On the *Document Shortcuts* dialog box, when you create a document shortcut you can mark the file to be included with bills.

You can mark client attachments to be included with bills.



When you print bills or send bills by email, a new bill option lets you include marked attachments with the bill.



Before printing bills:

1. When printing bills to printer, mark *Print attachments* to print a copy of associated attachments after the bill. Sage Timeslips can only print attachments in BMP, DIB, JPG, TIF, PNG, EMF, or WMF format.

2. When printing bills to printer, mark *Print summary page of attachments* to review the associated attachments from slips and clients, with a status on whether the attachments were able to print.

3. When sending bills by email, mark *Include attachments with email* to include a copy of associated attachments with the email message. Sage Timeslips can attach any types of files that your firm's email system can use.

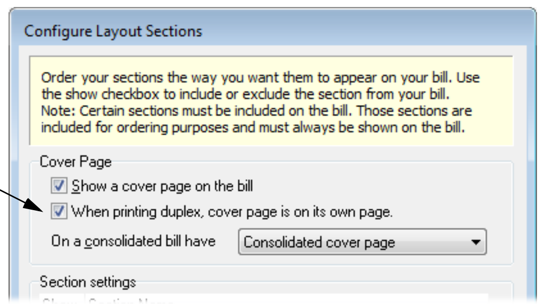
Printing bills on duplex printing

If you use a duplex printer when printing bills, Sage Timeslips now starts each client on a new sheet of paper.

You can also use new bill design settings to control the cover page and other bill sections.

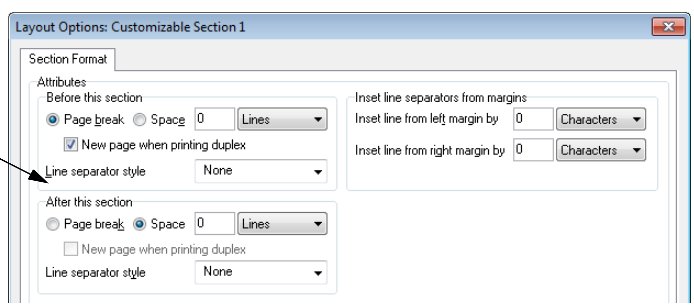
In the *Configure Layout Sections* dialog box, mark *When printing duplex, cover page is on its own page* to ensure a new piece of paper is used after the cover page.

You can determine if the cover page is on its own page.



In previous version, you've been able to control page breaks before and after specific layout sections within the *Layout Options* dialog box. Now when you've set up a page break, you have a new option to determine if you are starting a section on a new page or on a new sheet of paper.

You can determine if individual sections start on a new page.



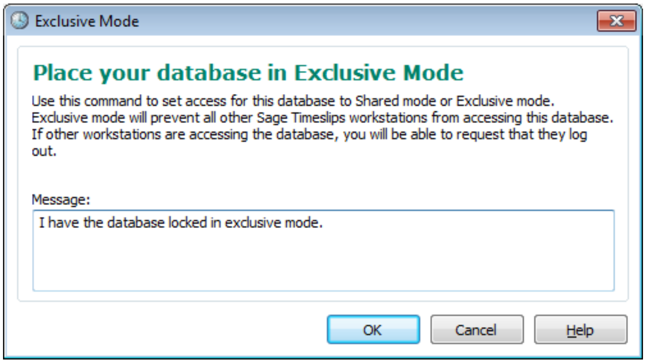
Help

For more information on designing layouts, look up "**bill design**" in the Sage Timeslips Help index.

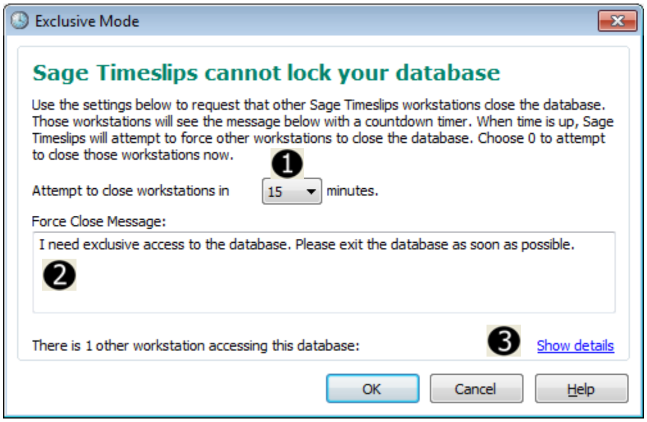
Working with Databases

Exclusive access

In Sage Timeslips 2012, you had the ability to lock a database in exclusive mode in case you needed to perform database maintenance. You can start this process by selecting **Special; Exclusive Mode.**



When you try to lock the database in exclusive mode, if any other workstations are accessing the database, additional options become available:

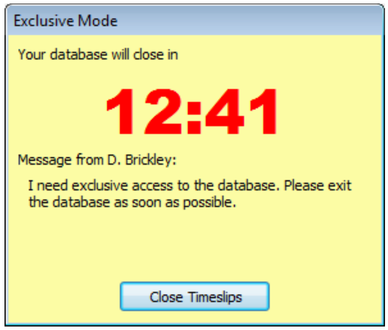


1 You can set a countdown that will appear on other workstations. When the count reaches **0:00**, Sage Timeslips will attempt to close other workstations.

2 You can set a message that will appear with the countdown.

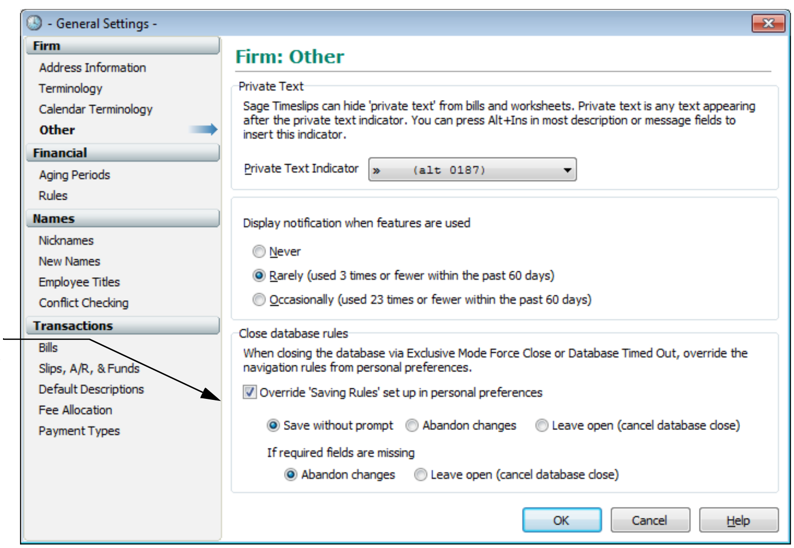
3 You can review a list of workstations accessing the database, in case you want to contact them.

Other workstations accessing the database will receive the message and a countdown timer within Sage Timeslips.



When the countdown timer reaches 0:00, Sage Timeslips will attempt to close other workstations. In *General Settings*, there are new database settings that control what to do with unsaved data on those workstations.

Choose if Sage Timeslips will try saving unsaved data when it closes other workstations.



For more information on exclusive mode, look up "**exclusive mode**" in the Sage Timeslips Help index.

Sage Timeslips 2012

4

• Sage Timeslips 2012 •

New Features in Sage Timeslips 2012

This chapter details the new features added in Sage Timeslips 2012.

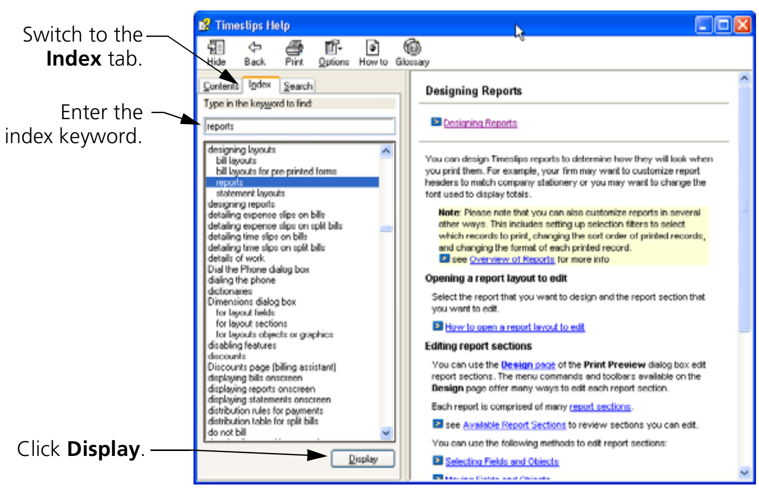
For a comprehensive list of all changes to Sage Timeslips, select **Help; What's New**. This topic discusses new features and changes for each past version.

How to find more information about each feature

Throughout this guide, we provide index keywords that direct you to comprehensive information available within the online Help.

To find the additional Help information:

1. Within Sage Timeslips 2013, select **Help; Online User's Guide**.
2. Switch to the **Index** tab of the *Sage Timeslips Help* dialog box.
3. Enter the index keyword. For example, to find more information about designing reports, look up **designing layouts** and choose **reports**.



4. Click **Display** to display the Help topic.

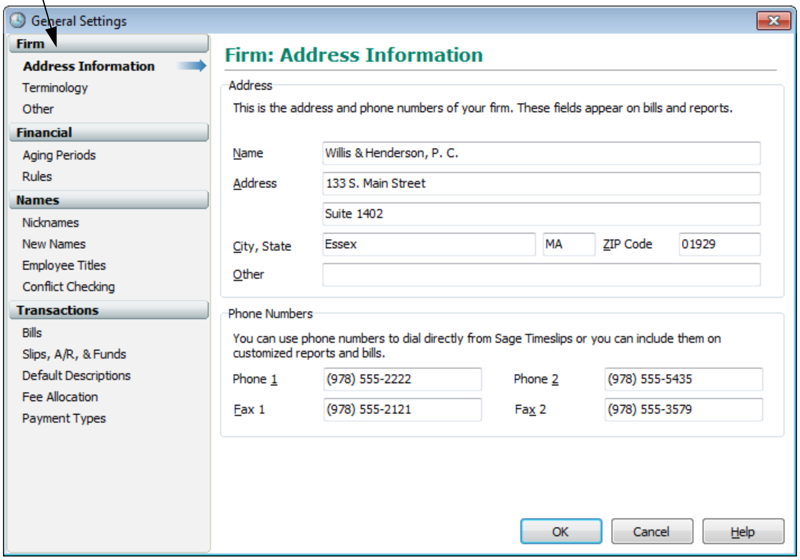
Program Settings

Updated Settings

General Settings dialog box

The *General Settings* dialog box (select **Setup; General**) has been updated to provide easier access to groups of settings.

Choose a settings group from the menu on the left.

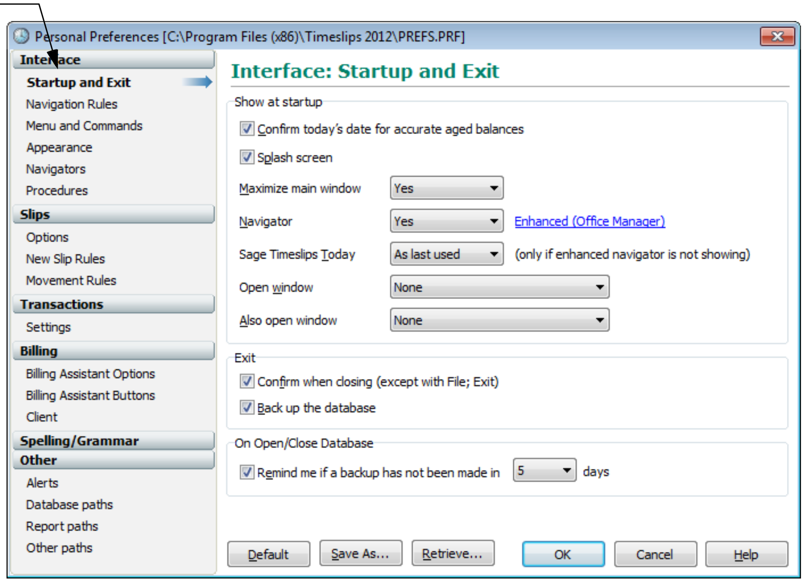


For more information on General Settings, look up "**General Settings**" in the Sage Timeslips Help index.

Personal Preferences dialog box

The *Personal Preferences* dialog box (select **Setup; Preferences**) has been updated to provide easier access to groups of settings.

Choose a preference group from the menu on the left.



For more information on Personal Preferences, look up "**Personal Preferences**" in the Sage Timeslips Help index.

Changes to preferences include:

- When customizing the buttons on the Billing Assistant, you can now choose more colors for the buttons.

  These settings are on the *Billing Assistant Buttons* page of the *Personal Preferences* dialog box.

- When using alerts, you can choose where triggered alerts will appear.

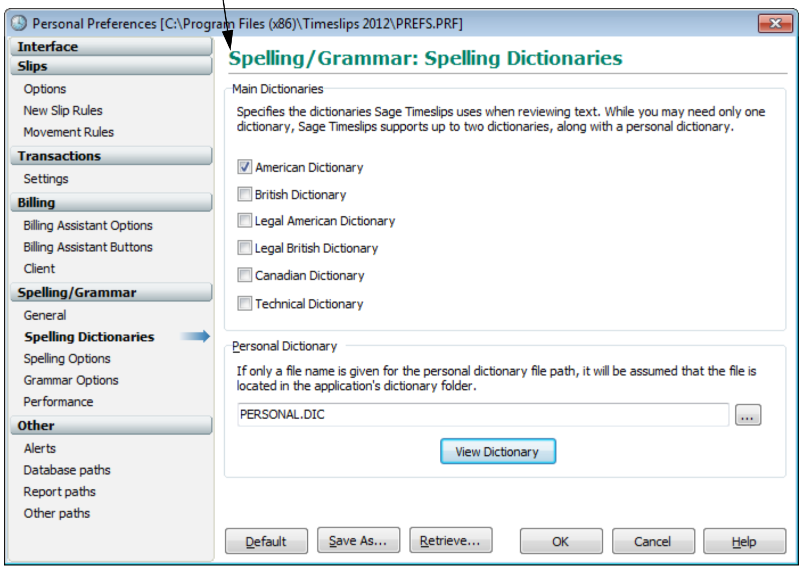
  This setting is on the *Alerts* page of the *Personal Preferences* dialog box.

- You can now choose a default path for backups and for new databases.

  This setting is on the *Database Paths* page of the *Personal Preferences* dialog box.

Checking Spelling and Grammar

The *Spelling Dictionaries* page includes new options for checking for spelling errors.



You can now use up to six dictionaries when searching for spelling errors.

There is also new *Technical Dictionary* available.

You can click **View Dictionary** to view and edit the entries in your personal spelling dictionary.

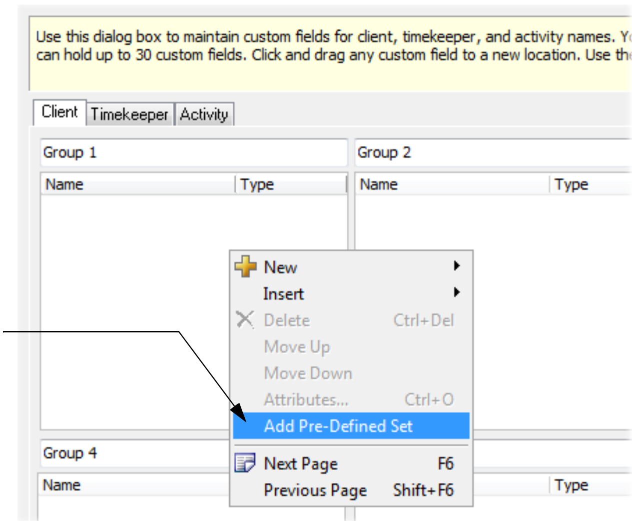
For more information on setting up spelling and grammar checking, look up "**Checking for Spelling and Grammar Errors**" in the Sage Timeslips Help index.

Setting Up Custom Fields

If you use electronic billing (audit house) links, you typically need to use the *Custom Fields* dialog box (select **Setup; Custom**) to set up custom fields for that link.

You can now quickly add all custom fields needed for an electronic billing link. Right click in any group and choose **Add Pre-Defined Set**.

Choose **Add Pre-Defined Set** to quickly add a set of custom fields.




Help

For more information on setting up custom fields, look up "**custom fields**" in the Sage Timeslips Help index.

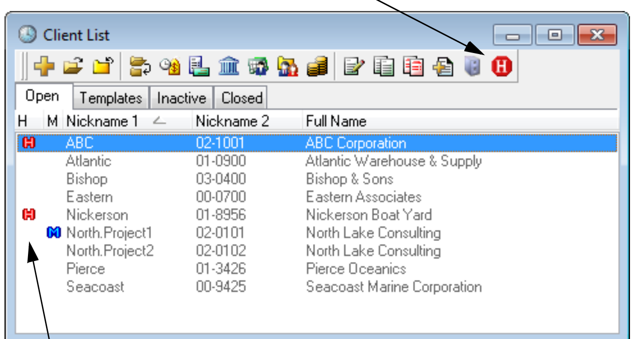
Working with Names

Hold the full bill

If you use the Hold options (located in the *Arrangement 1* page of *Client Information*) to hold clients from billing, it's now easier to review and change *Hold the full bill* option.

You can now review the *Hold the full bill* option for all clients from the Client List dialog box.

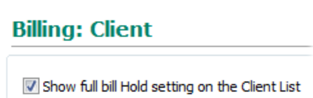
You can quickly toggle the *Hold the full bill* setting for the selected client.



The current *Hold the full bill* status is listed for each client.

For more information on bill hold settings, look up "**holding charges from billing**" in the Sage Timeslips Help index.

There is a new preference that determines if the Hold options display on the Client List. On the *Billing: Client* page of the *Personal Preferences* dialog box, you can unmark **Show full bill Hold setting on the Client List** to hide these settings.

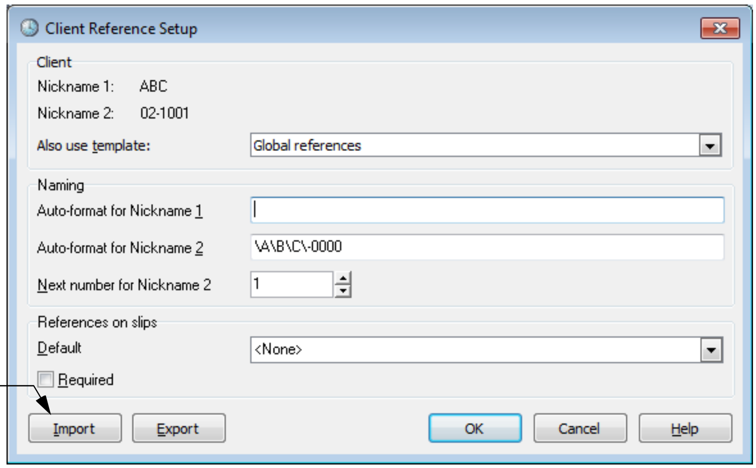


Reference settings

You use the *Client Reference Setup* dialog box (select **Names; Client References** select a client, and click **Client Setup** from the toolbar) to set up reference defaults for each client.

You can now click **Import** or **Export** to transfer those settings to other clients to save setup time.

Click **Import** or **Export** to transfer reference settings to other clients.



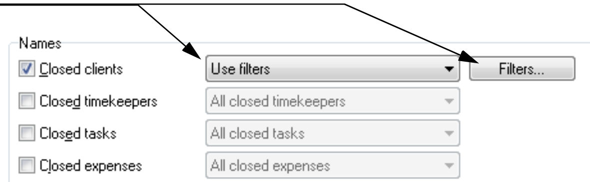
Help

For more information on reference settings, look up "**client references**" in the Sage Timeslips Help index.

Purging closed names

When purging closed names from the database using the *Purge* dialog box (select **File; Purge**), you can now use more filters to help you select which names to purge.

When purging names, choose **Use filters** and then click **Filters** to use selection filters.



Help

For more information on purging close names, look up "**purging data**" in the Sage Timeslips Help index.

Working with Slips and Transactions

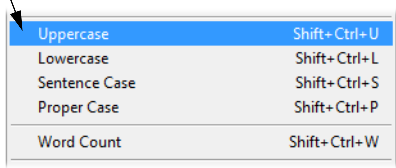
Entering and Editing Slips and Transactions

Changing text case or reviewing text length

When entering or editing description text on slips or transactions, you can quickly change the case of the text to use uppercase, lowercase, proper case, or sentence case.

You can also quickly find the length of description text, counting characters or words.

Right click in any description field for a list of additional commands.

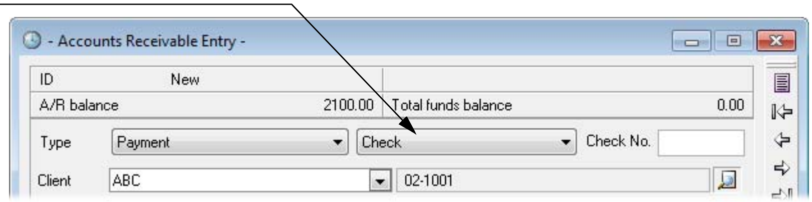


For more information on formatting text, look up "**entering descriptions**" in the Sage Timeslips Help index.

Setting up payment types

When you enter new payments, you select a payment type.

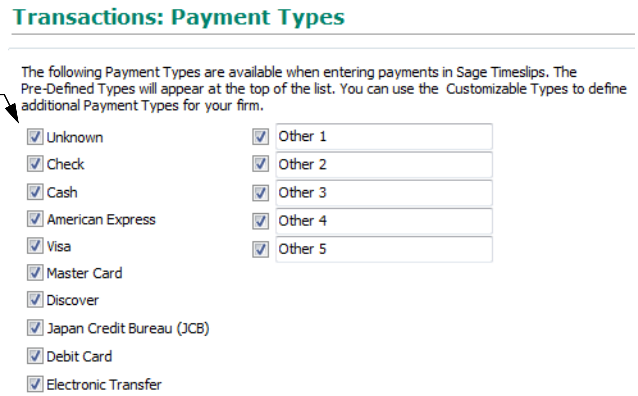
You can indicate the type of payment, such as check, cast, or credit card.



However, there may be payment types that you do not use.

Using settings within the *General Settings* dialog box (select **Setup; General** and choose **Payment Types**), you can choose which payment types to show or hide.

Unmark the payment types that you want to hide.

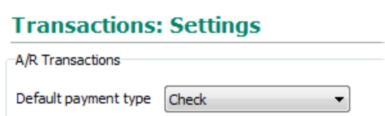


Help

For more information on setting up payment types, look up "**General Settings dialog box: Payment Types**" in the Sage Timeslips Help index.

Setting up a default payment type

When entering new payments, there may be a payment type that you most often use. Using a new preference in the *Personal Preferences* dialog box (select **Setup; Preferences** and choose **Transactions: Settings**), you can now specify a payment type as the default for new payments.



Choose the payment type to use on new payments.

Although new payments will use this payment type, you can change it at any time on individual payments.

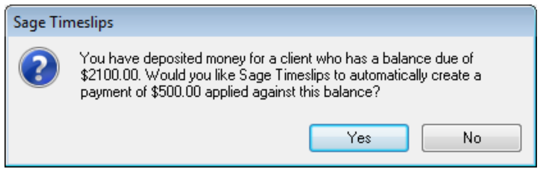
Help

For more information on choosing a default payment type, look up "**Personal Preferences dialog box: Transaction Settings**" in the Sage Timeslips Help index.

Automatic prompting to create new payments

If you use client funds accounts to hold money for client, you can enter a *payment to account* or a *deposit to account* transaction to increase the funds account balance.

When entering these transactions, if the client has an outstanding balance, Timeslips will now prompt you to use that money in a new payment.

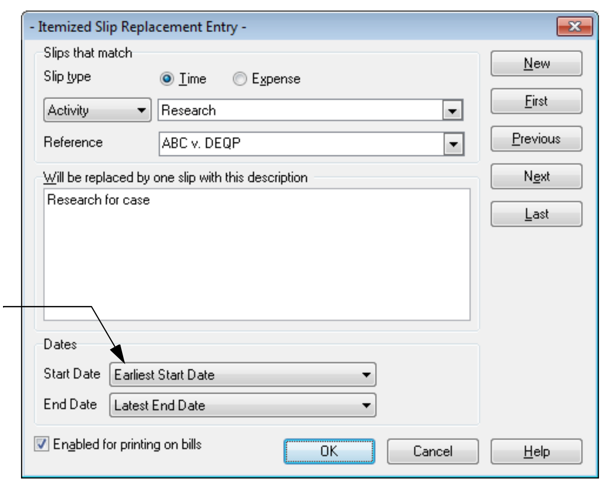


For more information on entering funds transactions, look up “**entering funds transactions**” in the Sage Timeslips Help index.

Including Slips and Transactions on Bills

Formatting replacement slips

When using replacement slips on bills, you can now choose which dates will appear for the replacement slip. To open the *Itemized Slip Replacement Entry* dialog box, select **Slips; Replacement Slips** and then open a replacement slip.



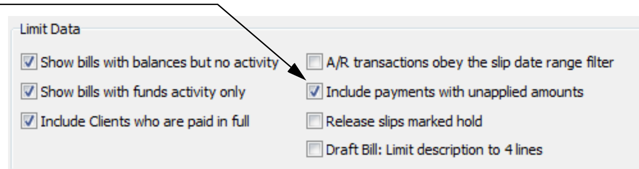
You can now choose the format of *Start Date* and *End Date*.

For more information on replacement slips, look up “**replacement slips**” in the Sage Timeslips Help index.

Omitting unapplied payments from bills

If you have some payments that include unapplied amounts, you can exclude those payments from displaying on bills, pre-bill worksheets, and Billing Assistant.

Unmark "Include payments with unapplied amounts" to omit them from the bill.



Help

For more information on report options, look up "**report options**" in the Sage Timeslips Help index.

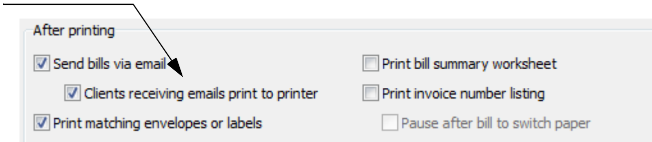
Printing Bills

Suppressing hard copies of emailed bills

When printing bills and sending some bills by email, you can now suppress hard copies of the bills for clients receiving them by email.

This is useful if you do not need a hardcopy of emailed bills or if you simply want to save paper.

Unmark "Clients receiving emails print to printer" to prevent emailed bills from printing.bill.



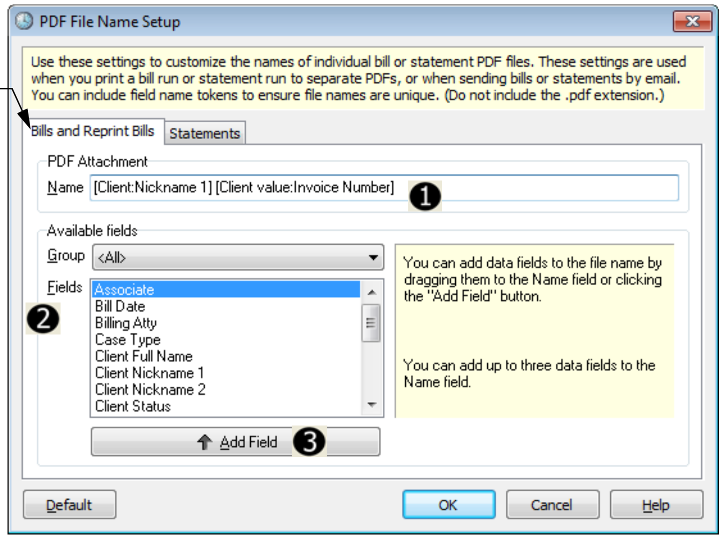
Help

For more information on emailing bills, look up "**sending bills by email**" in the Sage Timeslips Help index.

Automatically naming PDF files

When printing bills or statements to PDF, Timeslips can automatically name the individual PDF files using data field values.

You can set up PDF naming conventions for bills and statements.



In the *Name* field (1), you can enter a combination of free form text and data fields. Optionally, you can select a field from the *Fields* list (2) and click **Add Fields** (3) to add that field to the file name.

For more information on PDF files, look up "**printing reports to PDF**" in the Sage Timeslips Help index.

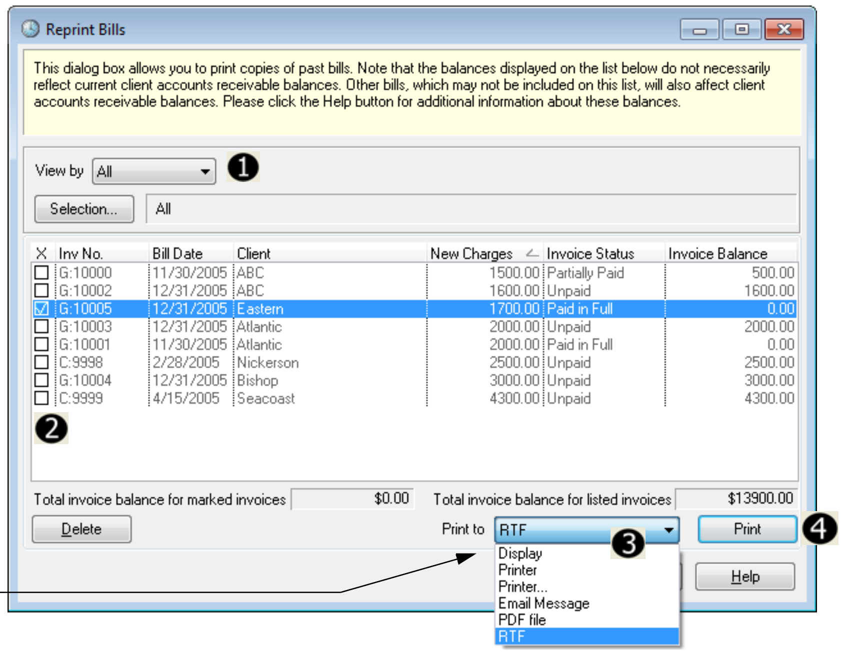
Creating bill images

When printing bills to PDF, RTF, or TEXT file, if you approve those bills, Timeslips will save a bill image that you can reprint. In previous versions, you had to print to a printer in order for reprint images to be saved.

For more information on bill images, look up "**reprinting bills**" in the Sage Timeslips Help index.

Reprinting bills

You can use the *Reprint Bills* dialog box (select **Bills; Reprint Bills**) to reprint past bills for your clients. When reprinting past bills, you can now reprint them to individual PDF files or to RTF format for editing.



You can now reprint bills to more formats.

Optionally, use the *View By* field and **Selection** button (1) to filter the invoices displayed. Mark (2) the invoices to reprint. Choose the destination of the reprint images. Click **Print** (4) to reprint the selected invoices.

Help

For more information on bill images, look up "**reprinting bills**" in the Sage Timeslips Help index.

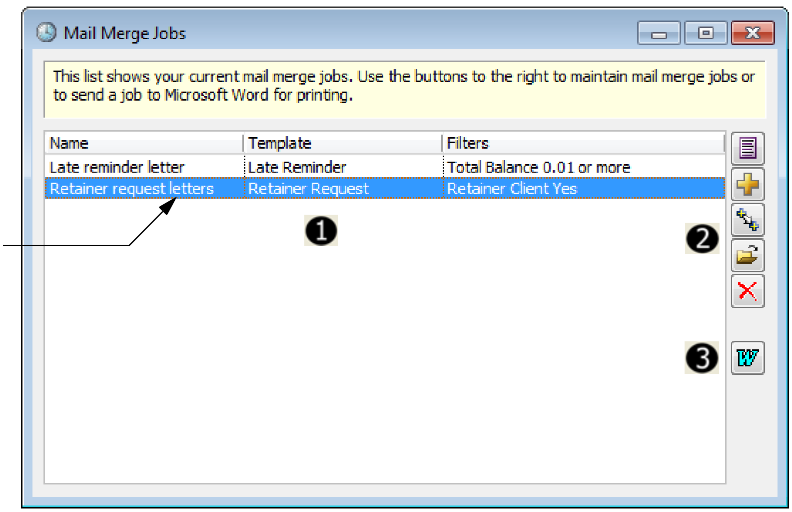
Printing Reports

Mail merge

You can now merge client information into Word documents to create unique letters for your clients.

Select **Reports; Mail Merge** to open the *Mail Merge Jobs* dialog box.

This list shows the mail merge jobs that you've created.



This dialog box lists (1) the names of jobs, the mail merge templates each job uses, and the selection filters applied to each job.

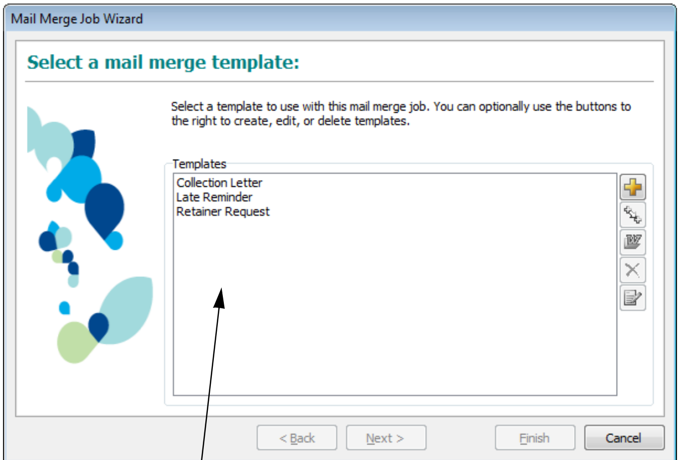
Use the toolbar to the right (2) to view the available mail merge templates, maintain mail merge jobs, or (3) send a mail merge job to Word.


Help

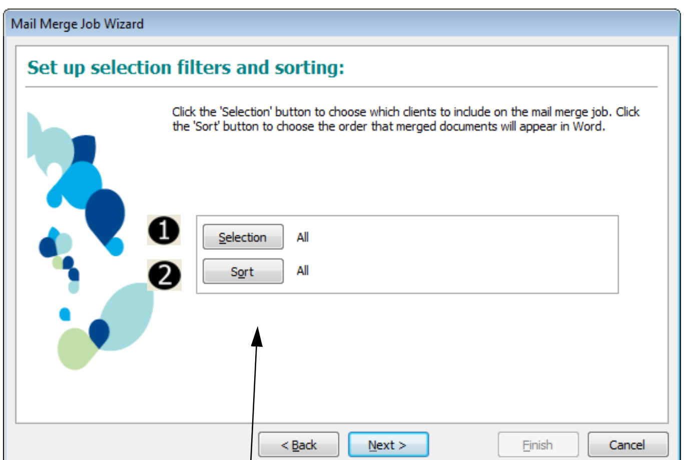
For more information on merging client information into Word documents, look up "**mail merge**" in the Sage Timeslips Help index.

Creating a new mail merge template

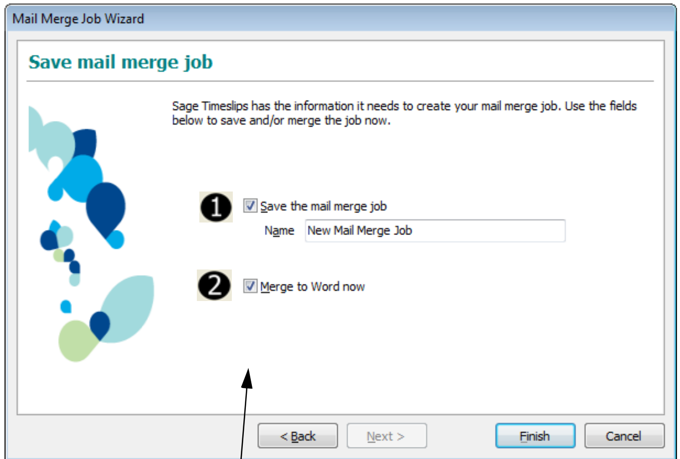
From the Mail Merge Jobs dialog box, click **New** to create a new job.



Use the *Select a mail merge template* view to choose the template for the new job.



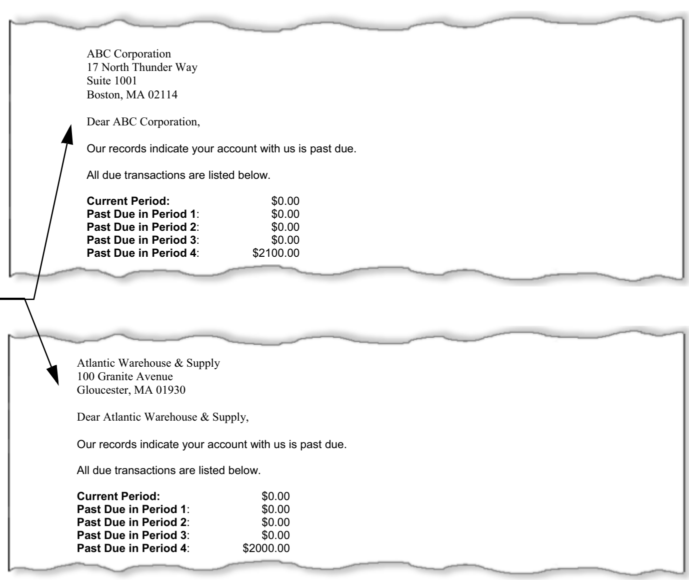
On the *Set up selection filters and sorting* view: (1) click **Selection** to set up selection filters that will determine which clients are included, and (2) click **Sort** to determine the sort order of the mail merge letters.



Use the *Save mail merge job* view to (1) name and save the mail merge job for future use and (2) optionally run the mail merge job now.

Merging to Word

When you merge the mail merge job to Word, a separate document will print for each client included in the job.


ABC Corporation
17 North Thunder Way
Suite 1001
Boston, MA 02114

Dear ABC Corporation,

Our records indicate your account with us is past due.

All due transactions are listed below.

Current Period:	$0.00
Past Due in Period 1:	$0.00
Past Due in Period 2:	$0.00
Past Due in Period 3:	$0.00
Past Due in Period 4:	$2100.00

Atlantic Warehouse & Supply
100 Granite Avenue
Gloucester, MA 01930

Dear Atlantic Warehouse & Supply,

Our records indicate your account with us is past due.

All due transactions are listed below.

Current Period:	$0.00
Past Due in Period 1:	$0.00
Past Due in Period 2:	$0.00
Past Due in Period 3:	$0.00
Past Due in Period 4:	$2000.00

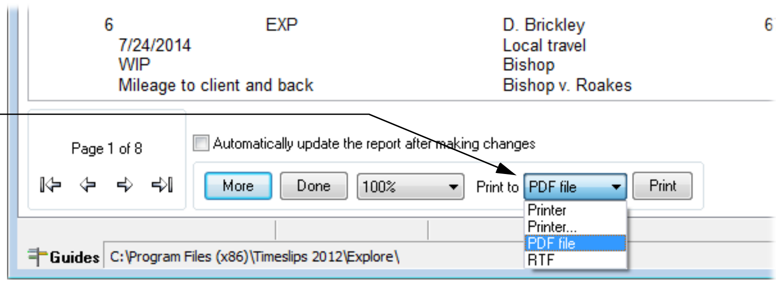
Data fields in each document will show data for that client.

Print format enhancements

Printing from preview

While previewing reports onscreen, you can now print them directly to printer, PDF, or RTF without having to generate the report again.

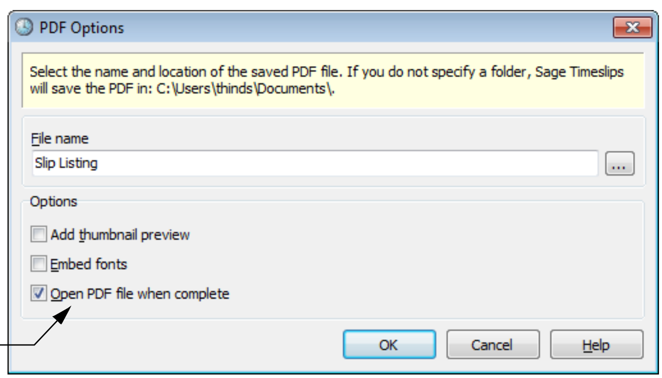
Set *Print to* to the appropriate format and click **Print**.



For more information on previewing reports, look up "**previewing reports**" in the Sage Timeslips Help index.

Automatically viewing files

When printing reports to file (PDF, RTF, Text, CSV, TAB), Timeslips can now automatically open the file for you.

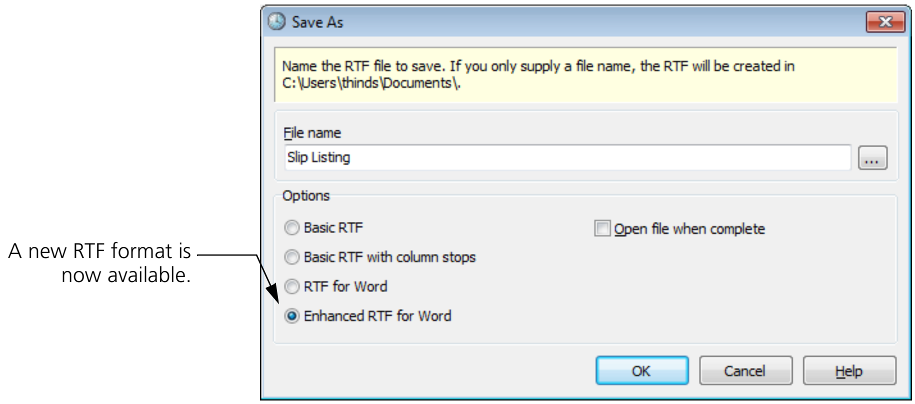


When printing to file, you can choose to open when it's saved.

For more information on printing reports, look up "**printing reports**" in the Sage Timeslips Help index.

Enhanced RTF for Word

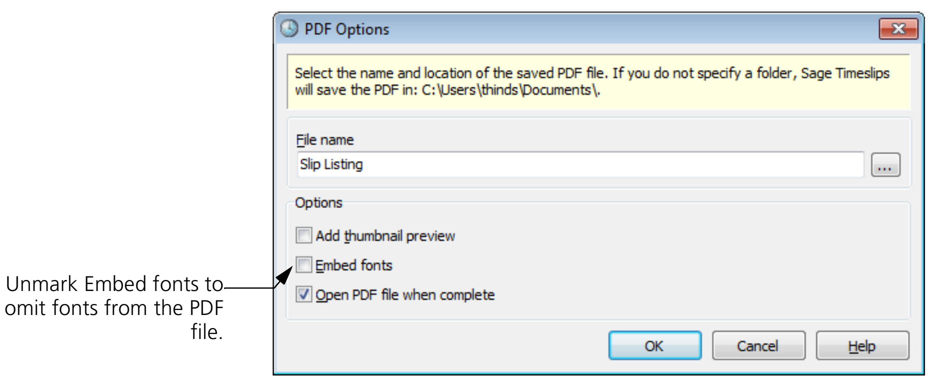
When printing reports to RTF, an additional RTF format is available: Enhanced RTF for Word. This RTF format resembles the report as it looks onscreen.



For more information on printing to RTF, look up "**printing reports to RTF**" in the Sage Timeslips Help index.

Omitting font information in PDF files

When printing reports to PDF, you can exclude font information to reduce the size of the PDF file.



For more information on printing to PDF, look up "**printing reports to PDF**" in the Sage Timeslips Help index.

Document Access

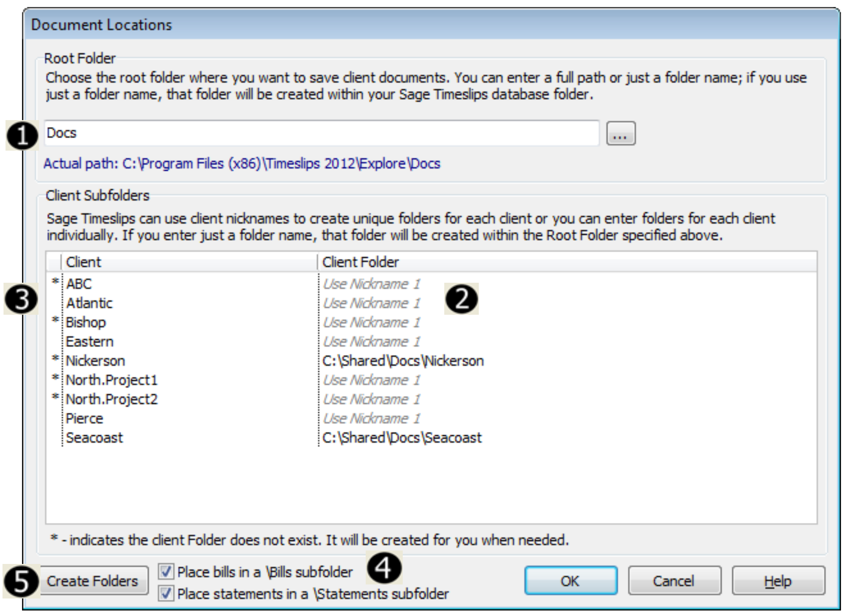
You can assign document folders and shortcut links to clients that allow you to quickly save and access documents for those clients.

Help

For more information on document access, look up "**accessing client documents**" in the Sage Timeslips Help index.

Creating document folders for clients

You can use the *Document Locations* dialog box (select **Setup; Document Locations**) to help simplify the creation or assignment of document folders for each client.



1) assign a *Root Folder* as a base that can contain document folders for each client

2) you can assign folder names based on the client's primary nickname or you can enter folder names manually.

3) an * will appear to the left of any folders that are missing

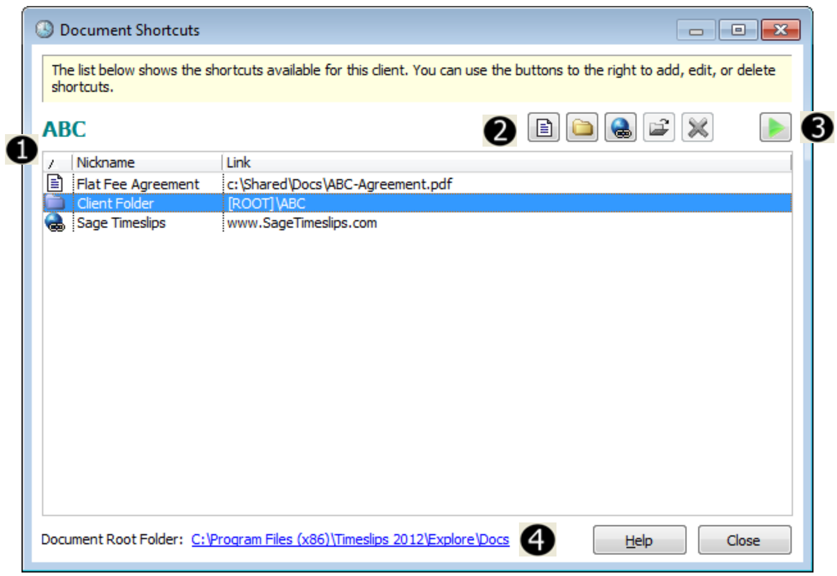
4) you can automatically create **\Bills** and **\Statements** subfolders within each client's document folder.

5) click **Create Folders** to create any missing document folders for your clients

Document and Folder Shortcuts

You can also set up or open shortcuts to non-Timeslips documents, folders, and web sites for each client.

From the *Client List* dialog box or the *Client Information* dialog box, click **View Documents** to open the *Document Shortcuts* dialog box.



1) For each client, you can maintain a unique list of shortcuts.

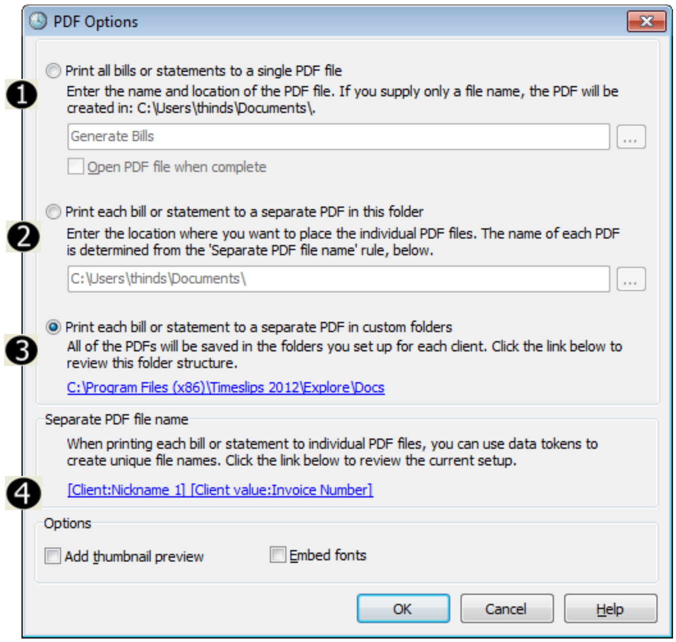
2) Use the tools at the top of the dialog box to create new shortcuts and maintain existing shortcuts. You can create shortcuts to specific documents, document folders, or web sites (URLs).

3) Double click any shortcut from the list to launch it or select a shortcut and click **Open**.

4) When you create new document or folder shortcuts, Timeslips will default to the *Document Root Folder*. You can click this link at the bottom of the dialog box to review your current Document Locations.

Creating PDFs for each client

When printing bills or statements to PDF, the *PDF Options* dialog box provides additional options:



You can (1) print the entire run to a single PDF file, you can (2) print individual PDF files for each client and place them in a specific folder, or you can (3) print individual PDF files for each client and place them in each client's document folder.

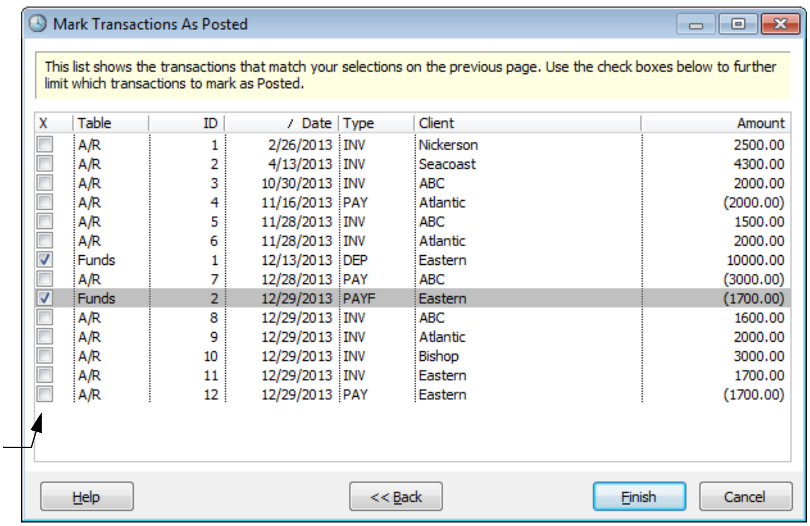
When printing separate PDF files for each client, Timeslips will use the naming rules (4) you have set up in the *PDF File Name Setup* dialog box.

TAL and TAL Pro

Manually marking transactions as posted

When you link Timeslips with a general ledger, there may be transactions that you do not transfer from Timeslips to that general ledger.

You can now use the *Mark Transactions As Posted* dialog box (select **Setup; Mark Transactions As Posted**) to mark these transactions so they do not transfer to your general ledger.



Choose the transactions that you want to mark as posted.

For more information on marking transactions as posted, look up "**Mark Transactions as Posted dialog box**" in the Sage Timeslips Help index.

Status of name synchronization

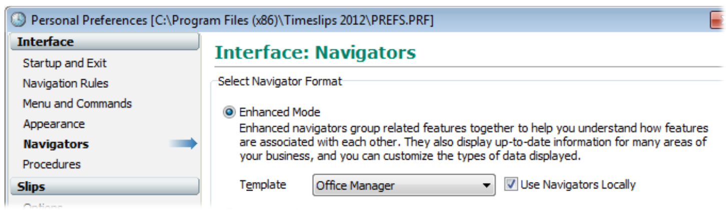
If you connect Timeslips with Peachtree or QuickBooks and you synchronize names, Timeslips now provides enhanced log files that indicate the status of name synchronization.

Reviewing documentation

If you connect Timeslips with Peachtree or QuickBooks, you can now quickly access documentation in PDF format through the **Help; Other Documents** menu.

Enhanced Navigators

When using enhanced navigators in a multiuser environment, the *Use Navigators Locally* setting allows users to maintain their own templates so changes do no affect other users.

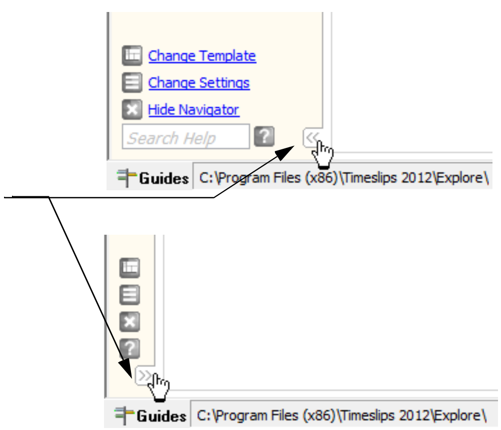


Help

For more information on using a local copy of the navigator, look up "**Personal Preferences dialog box: Navigators page**" in the Sage Timeslips Help index.

When viewing enhanced navigators:

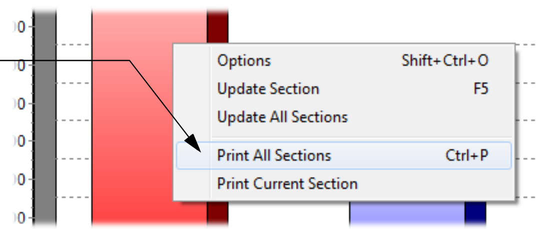
- you can collapse the options on the left-side to provide more room



In the bottom left corner of the navigator, click **<<** to collapse or **>>** to restore the navigator.

- you can double-click on any section heading to view the section in full-screen mode. This is be useful when viewing long lists of data or detailed graphs.
- you can right-click on any section to print that section or all sections

Right click on any navigator section and click **Print Current Section** or **Print All Sections**.



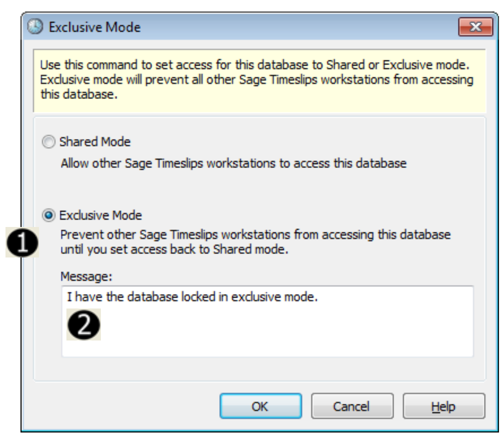
Help

For more information on using enhanced navigators, look up "**enhanced navigators**" in the Sage Timeslips Help index.

Administration / Network / System

Setting Exclusive Mode

You can now use the *Exclusive Mode* dialog box (select **Special; Exclusive Mode**) to temporarily prevent access by other timekeepers. This is useful, for example, if you want to print bills or reports, and do not want additional records entered while you verify values.



Choose **Exclusive Mode** (1) to lock the current database. Optionally enter a message (2) that other timekeepers will see when they try to access the database.

Help

For more information on using enhanced navigators, look up "**exclusive mode**" in the Sage Timeslips Help index.

Reviewing other users

You can now use the *About Sage Timeslips* dialog box (select **Help; About**) to view details about other workstations that are accessing the Timeslips database.

At the bottom of the *About Sage Timeslips* dialog box, click **View Station Access.**

Click **View Station Access** to view information about other workstations that are accessing the database.

Help

For more information on the view station access, look up "**About Sage Timeslips dialog box**" in the Sage Timeslips Help index.

Log Files

You can now access Timeslips-related log files quickly using the new **Special; Explore Log Files** command

Sage Timeslips 2011

5

• Sage Timeslips 2011 •

New Features in Sage Timeslips 2011

This chapter details the new features added in Sage Timeslips 2011.


Help

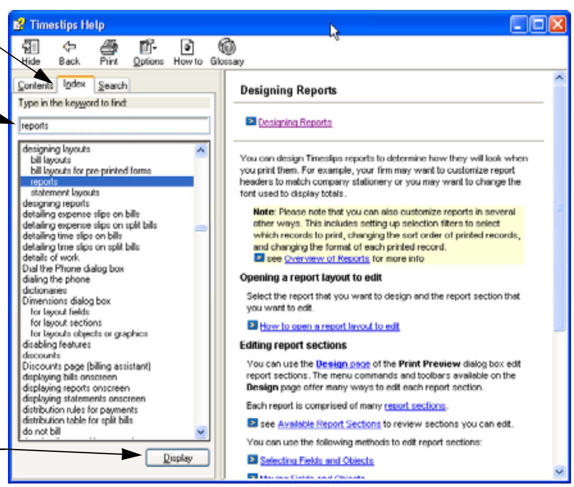
For a comprehensive list of all changes to Sage Timeslips, select **Help; What's New**. This topic discusses new features and changes for each past version.

How to find more information about each feature

Throughout this guide, we provide index keywords that direct you to comprehensive information available within the online Help.

To find the additional Help information:

1. Within Sage Timeslips 2013, select **Help; Online User's Guide**.
2. Switch to the **Index** tab of the *Sage Timeslips Help* dialog box.
3. Enter the index keyword. For example, to find more information about designing reports, look up **designing layouts** and choose **reports**.



4. Click **Display** to display the Help topic.

Enhanced Reporting

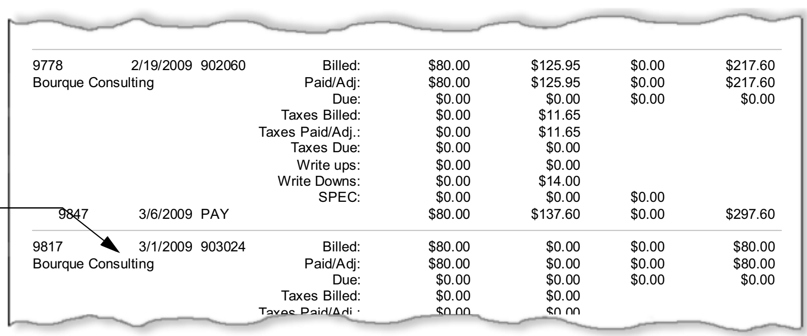
This release provides the following new and enhanced features for reporting.

User-defined invoice reports

This new report is available on the *A/R Transactions* page of the *Report List* dialog box. Select **Reports; A/R Transactions** to access this report.

This report type allows you to build your own custom reports from invoice transactions, so you can choose only the invoice information that you need. You can optionally include a break down of transactions applied to the invoices.

Use this report to detail invoices and payments applied to them.



9778	2/19/2009	902060	Billed:	$80.00	$125.95	$0.00	$217.60
Bourque Consulting			Paid/Adj:	$80.00	$125.95	$0.00	$217.60
			Due:	$0.00	$0.00	$0.00	$0.00
			Taxes Billed:	$0.00	$11.65		
			Taxes Paid/Adj.:	$0.00	$11.65		
			Taxes Due:	$0.00	$0.00		
			Write ups:	$0.00	$0.00		
			Write Downs:	$0.00	$14.00		
			SPEC:	$0.00	$0.00	$0.00	
9847	3/6/2009	PAY		$80.00	$137.60	$0.00	$297.60
9817	3/1/2009	903024	Billed:	$80.00	$0.00	$0.00	$80.00
Bourque Consulting			Paid/Adj:	$80.00	$0.00	$0.00	$80.00
			Due:	$0.00	$0.00	$0.00	$0.00
			Taxes Billed:	$0.00	$0.00		
			Taxes Paid/Adj.:	$0.00	$0.00		

You can change the design of this report to include additional fields as needed.

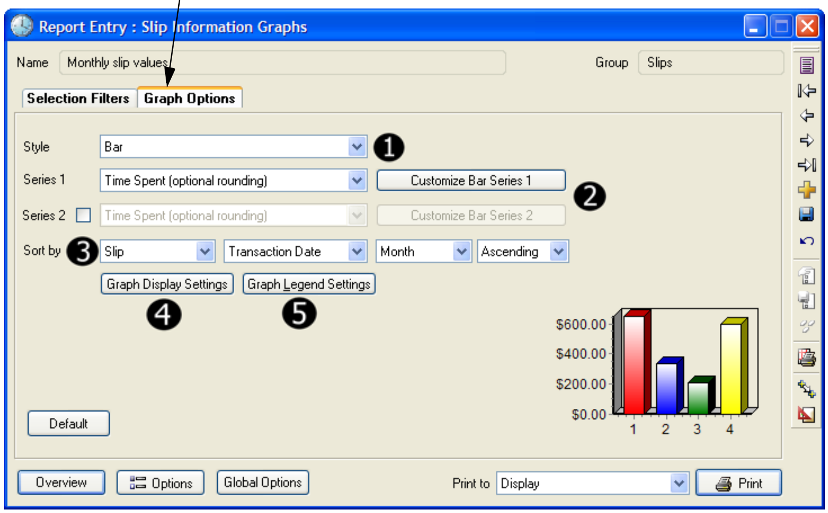
Help

For more information on this report, look up "**user-defined invoice listing**" in the Sage Timeslips Help index.

Improved Charts and Graphs

When creating or editing graph reports, you now have more control over the appearance of the graph.

You can use the new **Graph Options** page of the **Report Entry** dialog box to customize graphs and charts on reports.



Using these settings you can:

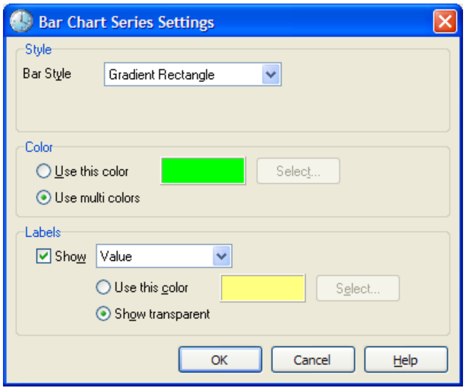
1) Choose the style of the of chart/graph

For example, you can choose a bar graph, horizontal bar graph, pie chart, or other type of chart.

2) Choose the data to evaluate

Use the *Series 1* field and optionally the *Series 2* field to choose which fields will appear on the report.

You can click the **Customize** button to the right to further modify the appears of each series on the report.

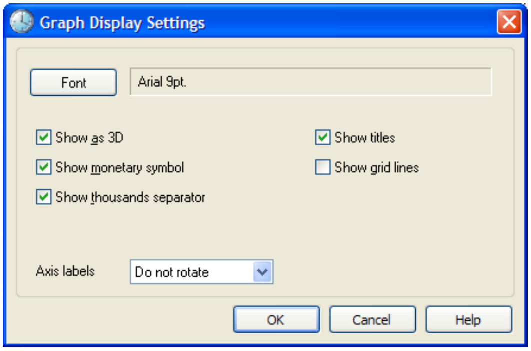


3. Choose how the series is sorted

Use the *Sort by* fields to determine the order in which the values are sorted the series. For example, on a bar chart the sort order determines what each bar represents.

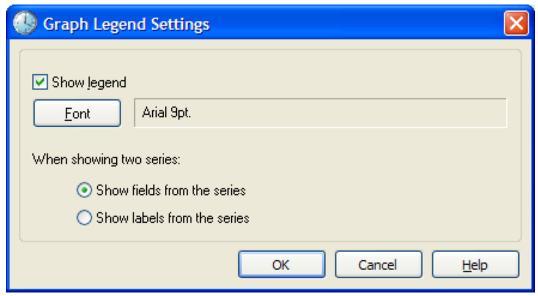
4. Choose display settings for the graph

Click **Graph Display Settings** to control options such as the font used in the graph, whether grid line display, or if the dollar sign displays for monetary values.



5. Choose legend settings for the graph

Click **Graph Legend Settings** to control the font used in the legend and how to display the legend for multiple series.



For more information on setting up charts and graphs, look up "**formatting graphs**" in the Sage Timeslips Help index.

Quick View of Graphs on Report Preview

When previewing graph reports, you can now quickly switch the graph type to review how the data will look in other types of graphs.

Graph Settings on Navigators

You can display graphs on navigators and on Sage Timeslips Today. When setting up or editing these graphs, you can now access similar settings that are available to graph reports.

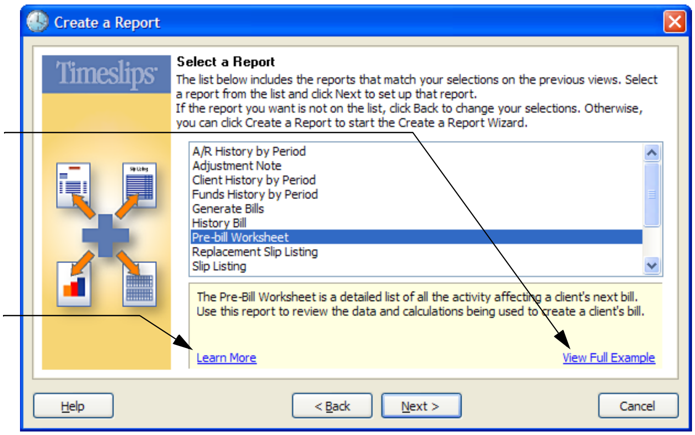
For more information on including graphs on navigators, look up "**enhanced navigators**" in the Sage Timeslips Help index.

Enhanced Report wizard

When finding and creating reports, the report wizard now includes more info about reports, with links to a report sample and report Help.

Click **View Full Example** to view a PDF sample of the selected report.

Click **Learn More** to view additional details about the selected report.



You can select **Reports; Find a Report** or **Reports; Create a Report** to open the report wizards.

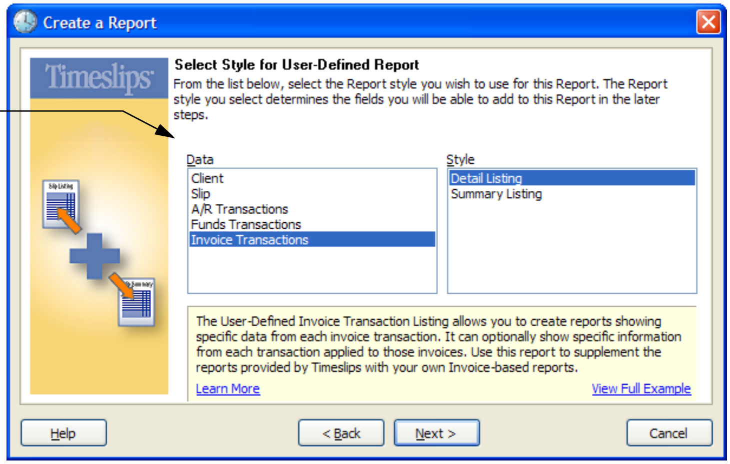
Help

For more information on using the report wizard, look up "**create a report wizard**" in the Sage Timeslips Help index.

Starting Templates for User-Defined Reports

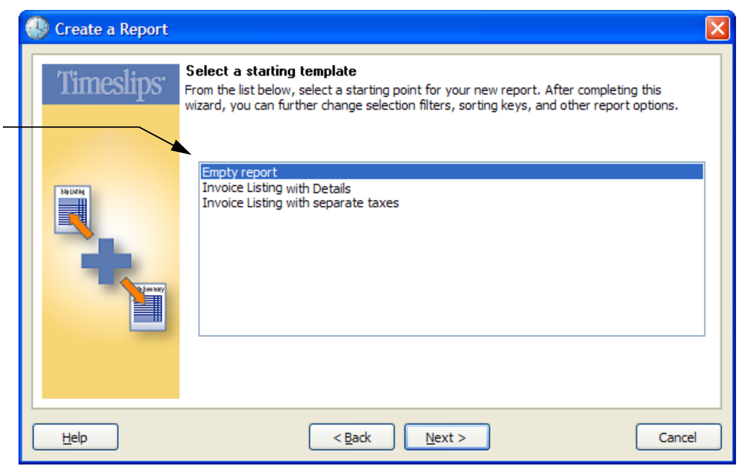
When creating user-defined reports using the report wizard, users more easily choose the type of report to create.

Select the type of data for the report (on the left) and the style of the report (on the right).



After choosing the type of report to create, you can also choose a starting template for the report. Sage Timeslips will create a report populated with fields based on your selections. (Choose **Empty report** if you do not want any fields set up automatically.)

Choose a template to include starting fields on the report.

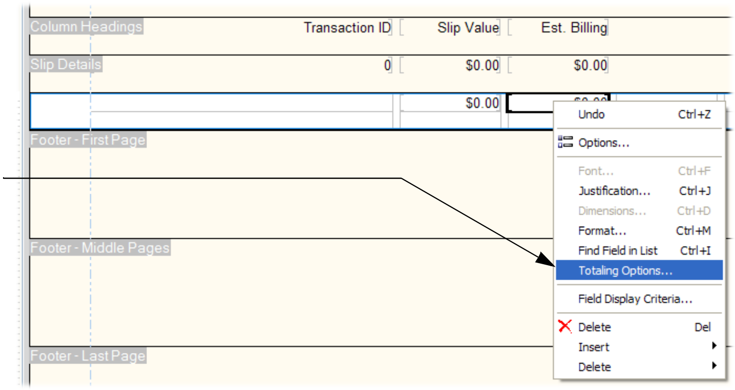


For more information on using the report styles, look up "**report styles**" in the Sage Timeslips Help index.

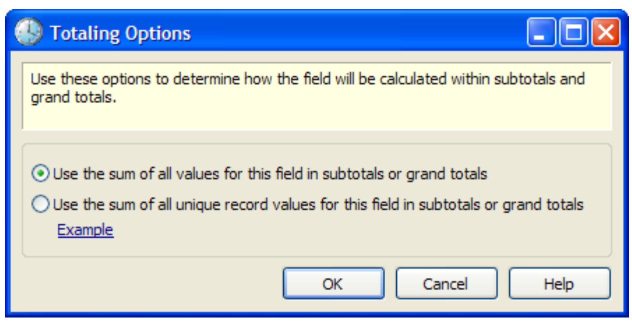
Calculation Totals

On user-defined reports, you can now control how individual fields are totaled. You can right click on a field in the total section to access the Totaling Options.

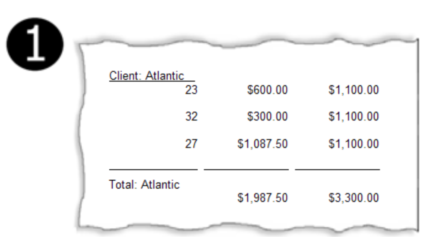
Right click on a total field to access the **Totaling Options**.

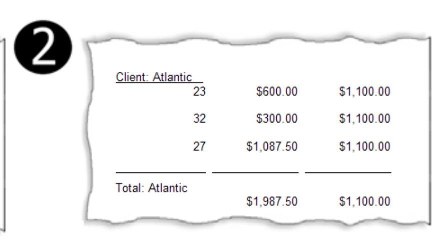


For a single data field, you can choose if the total will include all values or just unique values.



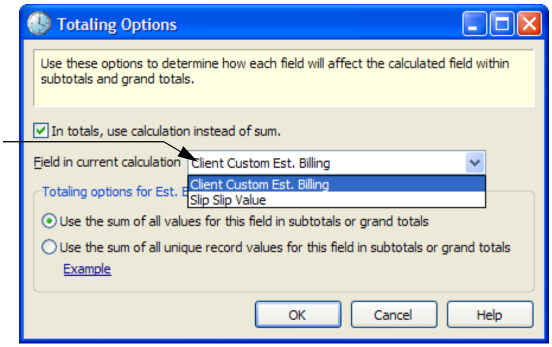
In the examples below, the right-most column show the effects of this option. In example 1, the option is set to “Use the sum of all values...”. In example 2, the option is set to “Use the sum of all unique values...”.





When changing totaling options for a calculated field, you can choose how totaling is calculated for each specific field within the calculation.

You can set up totaling options for Right click on a total field to access the **Totaling Options**.

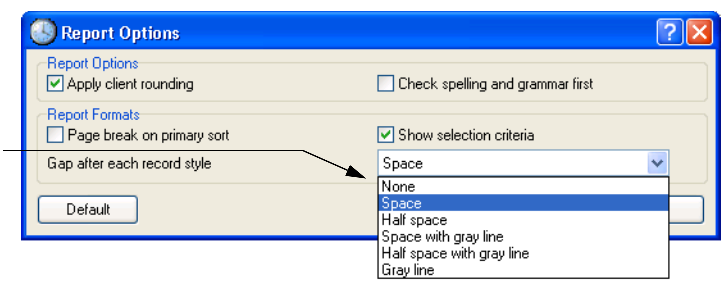


For more information on changing totaling options, look up "**creating custom report calculations**" in the Sage Timeslips Help index.

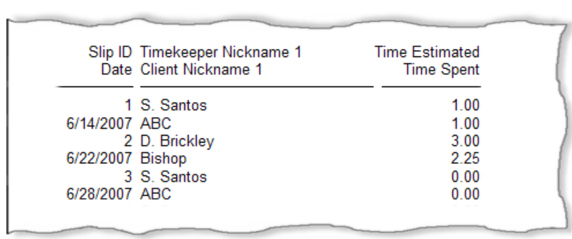
Record Separators in User-Defined Reports

When designing and formatting user-defined reports, you can now determine how individual records are spaced in the report.

Using the Report Options for any user-defined report, you can select the type of gap between records.

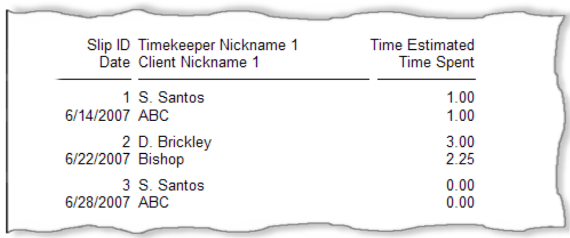


For example, **None** will not include a gap, allowing you to print more records per page.



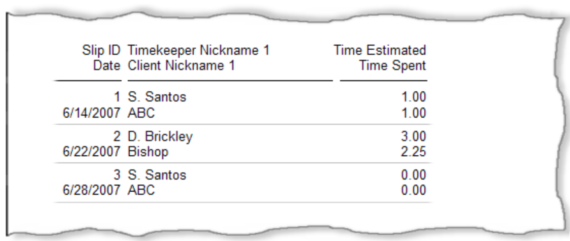
Slip ID Date	Timekeeper Nickname 1 Client Nickname 1	Time Estimated Time Spent
1	S. Santos	1.00
6/14/2007	ABC	1.00
2	D. Brickley	3.00
6/22/2007	Bishop	2.25
3	S. Santos	0.00
6/28/2007	ABC	0.00

Half space or **Space** will include blank space before each record.



Slip ID / Date	Timekeeper Nickname 1 / Client Nickname 1	Time Estimated / Time Spent
1	S. Santos	1.00
6/14/2007	ABC	1.00
2	D. Brickley	3.00
6/22/2007	Bishop	2.25
3	S. Santos	0.00
6/28/2007	ABC	0.00

You can also include gray lines between records for a more visual separation of records.



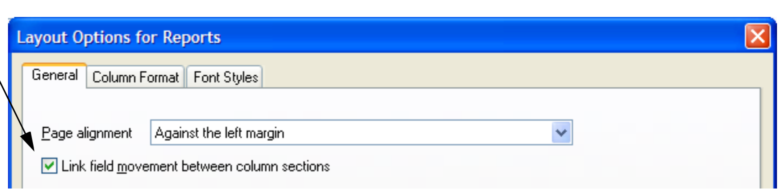
Slip ID / Date	Timekeeper Nickname 1 / Client Nickname 1	Time Estimated / Time Spent
1	S. Santos	1.00
6/14/2007	ABC	1.00
2	D. Brickley	3.00
6/22/2007	Bishop	2.25
3	S. Santos	0.00
6/28/2007	ABC	0.00

For more information on spacing records, look up "**report format: Gap after each record style**" in the Sage Timeslips Help index.

Automatically moving report fields

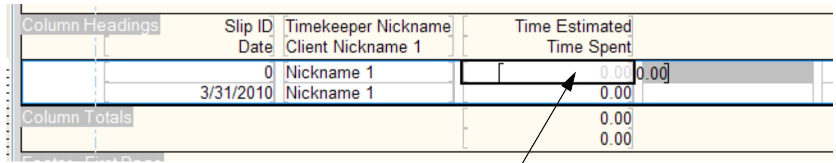
When you design user-defined reports, report headings and report totals can move automatically as you move report fields.

In the *Design* page of a user-defined report, select **Section; Options** to open the *Layout Options* dialog box. Switch to the *General* page.

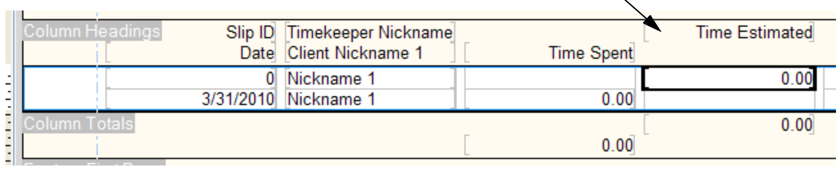


You can link fields with headings and totals, so headings and totals move as you move fields.

As you move fields in the layout, related fields will move automatically.



You can link fields with headings and totals, so headings and totals move as you move fields.



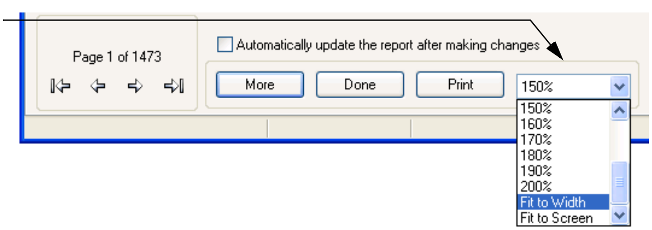
Help

For more information on designing reports, look up "**moving:layout fields and objects**" in the Sage Timeslips Help index.

Change View Size on Print Preview

When previewing reports on-screen, you now have more control over the size of the report being displayed.

You can choose a specific zoom level, fit the preview to the width of the screen, or fit the preview to the size of the screen.



Help

For more information on printing report onscreen, look up "**previewing reports**" in the Sage Timeslips Help index.

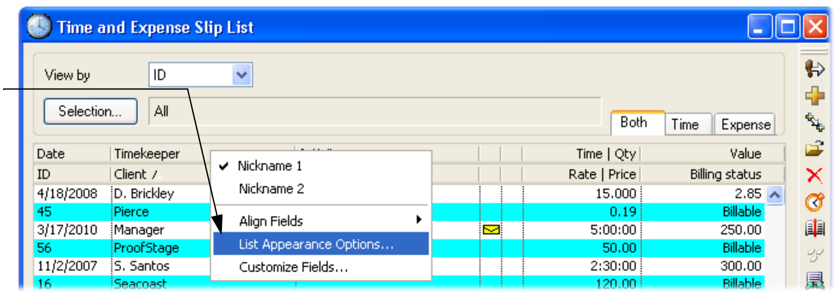
Maintaining Slips and Transactions

This release provides the following new and enhanced features for maintaining slips and transactions.

Customize list appearance

You can now customize the colors of slip and transaction lists. You can also change how Sage Timeslips highlights every other row.

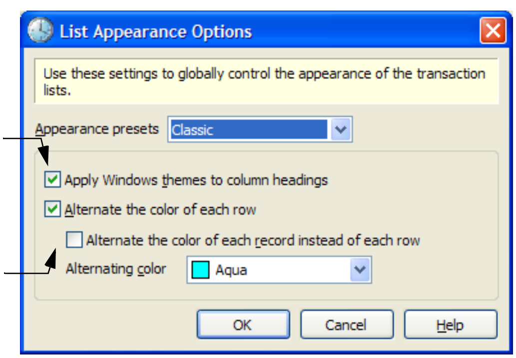
Right click on the column heading and choose **List Appearance Options**.



Use the **List Appearance Options** dialog box to customize the appearance of the Time and Expense Slip List, the Accounts Receivable List, and the Client Funds List.

You can apply Windows themes to column headings...

...and choose how Timeslips highlights alternating records.



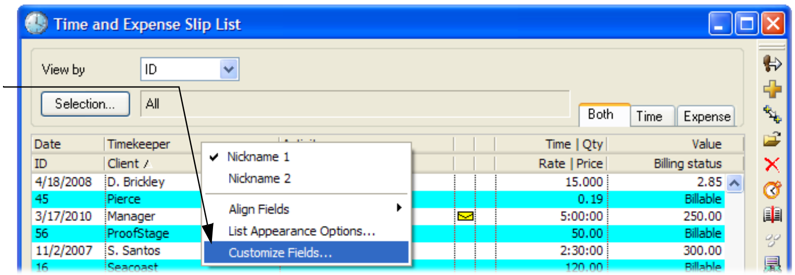
Help

For more information on customizing slip and transaction lists, look up “**customizing lists**” in the Sage Timeslips Help index.

Customize fields that display on lists

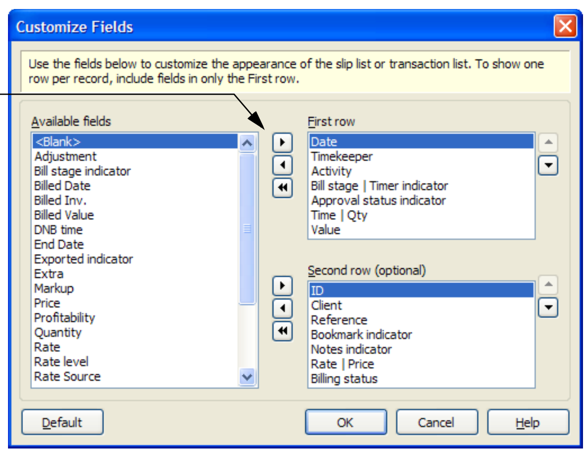
You can now choose the fields you want to display on slip and transaction lists.

Right click on the column heading and choose **Customize Fields**.



Use the **Customize Fields** dialog box to choose which fields will appear in the Time and Expense Slip List, the Accounts Receivable List, and the Client Funds List.

Add available fields to the **First row** and optionally the **Second row** lists.



You can show one or two rows for each record (slip or transaction) and you can change justification for each individual field.

Help

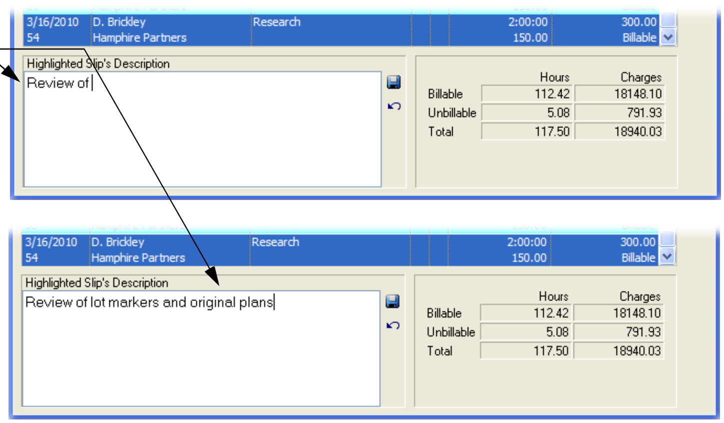
For more information on customizing slip and transaction lists, look up "**customizing lists**" in the Sage Timeslips Help index.

Quick description entry on lists

When reviewing slips or transactions, you can now add or edit descriptions without having to open the slip or transaction first.

From the Time and Expense Slip List, the Accounts Receivable List, or the Client Funds List, you can type directly in the description field at the bottom of the list.

You can now add or edit description text right from the list.

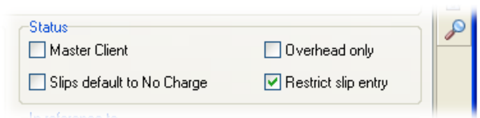


You can also right click in this field to access many description commands, like text formatting commands or spelling and grammar checking.

For more information on quick descriptions, look up "**entering descriptions**" in the Sage Timeslips Help index.

Restrict Slip Entry

In previous versions, Timeslips provided you with the ability to mark clients as *restricted*.



When a timekeeper started a slip for the restricted client, Timeslips would display a warning, but you could bypass the warning and enter a slip.

A new security setting "Warn on restricted clients" allows you to lock out restricted clients for some timekeepers.

Choose how logins with this profile interact with restricted clients.

If this option is marked in a profile, timekeepers will be warned if a client is restricted, but they can still enter slips.

If this option is unmarked in a profile, timekeepers will be prevented from entering new slips for restricted clients.

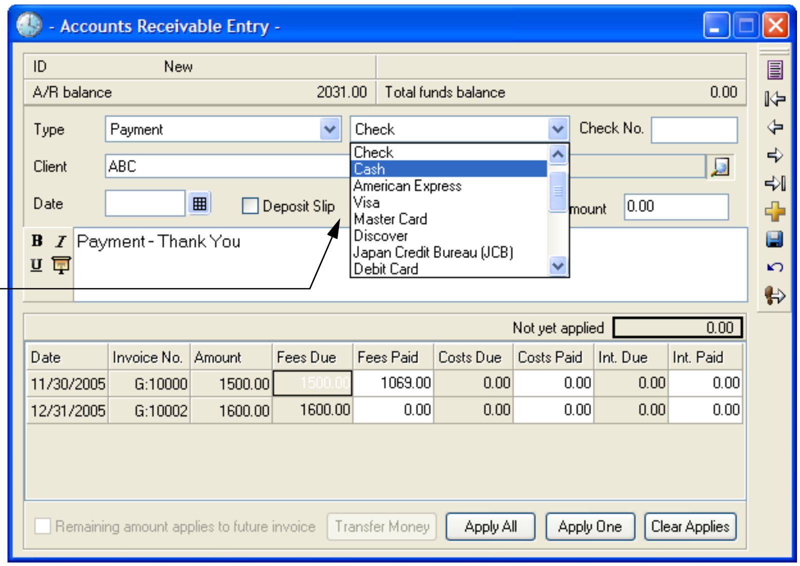
Help

For more information on security, look up "**security rights**" in the Sage Timeslips Help index.

Choosing the payment type

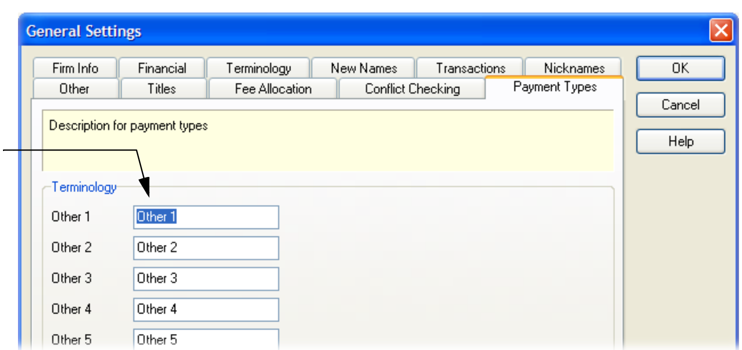
When you enter a payment from a client, you can now indicate the payment method.

You can now indicate the method that clients use to pay their bill.



Along with standard payment types, you can also set up your own entries for this list. Use the *Payment Types* page of the *General Settings* dialog box (select **Setup; General**) to customize these payment types.

You can enter your own payment types.



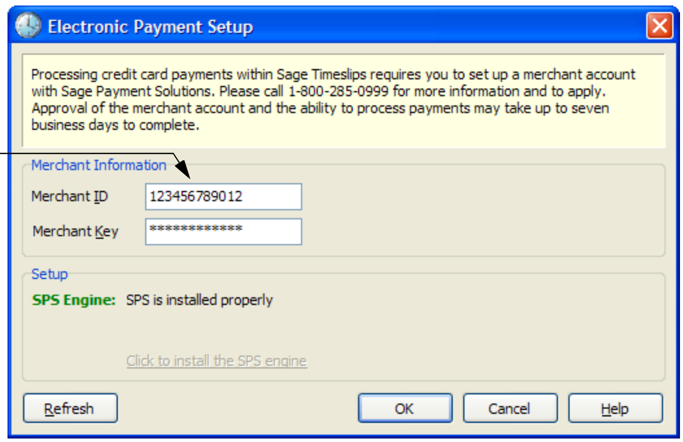
Help

For more information on entering payments, look up "**entering payments**" in the Sage Timeslips Help index.

Processing electronic payments

When clients pay by credit or debit cards, you can now process those payments through Sage Timeslips. After you sign up for a Sage Payment Solutions merchant account, you can enter your credentials in the *Electronic Payment Setup* dialog box (select **Setup; Electronic Payments**).

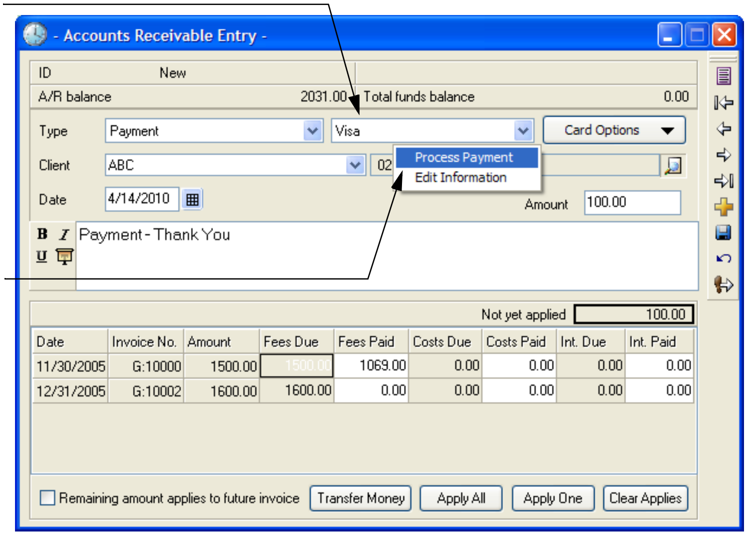
Enter your merchant credentials.



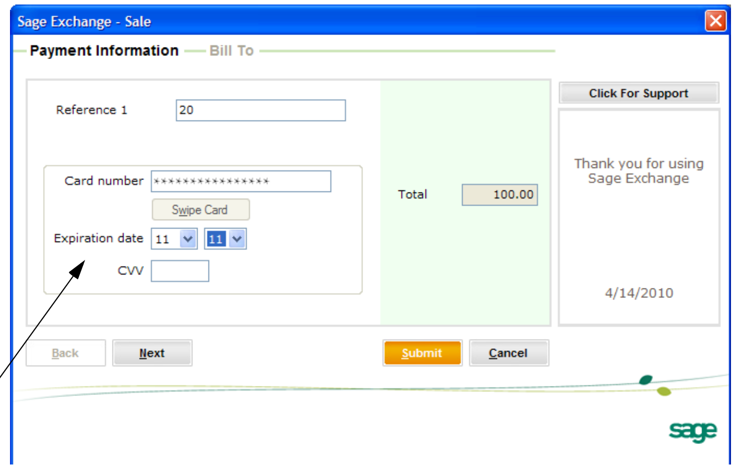
When entering payments, if you set the payment type to a credit card or debit card, you can process the card through Sage Timeslips.

Choose a credit card or debit card.

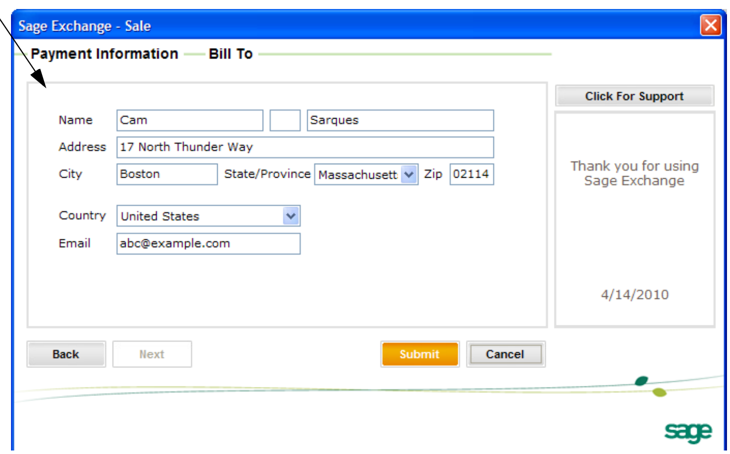
Click **Card Options** and then choose **Process Payment**.



Sage Timeslips will open Sage Exchange to process the payment.



Entry card details and verify client details.



After processing the payment, you can then perform optional actions for the authorized payment, such as printing a receipt of the payment, voiding the payment, or printing reports on electronic payments.

Help

For more information on processing payments, look up "**processing electronic payments**" in the Sage Timeslips Help index.

Maintaining Names

This release provides the following new and enhanced features for maintaining names.

Increase custom fields available per name

You can now create up to 90 custom fields for each client, timekeeper, task, and expense. This limit was raised from 30 custom fields in previous versions.

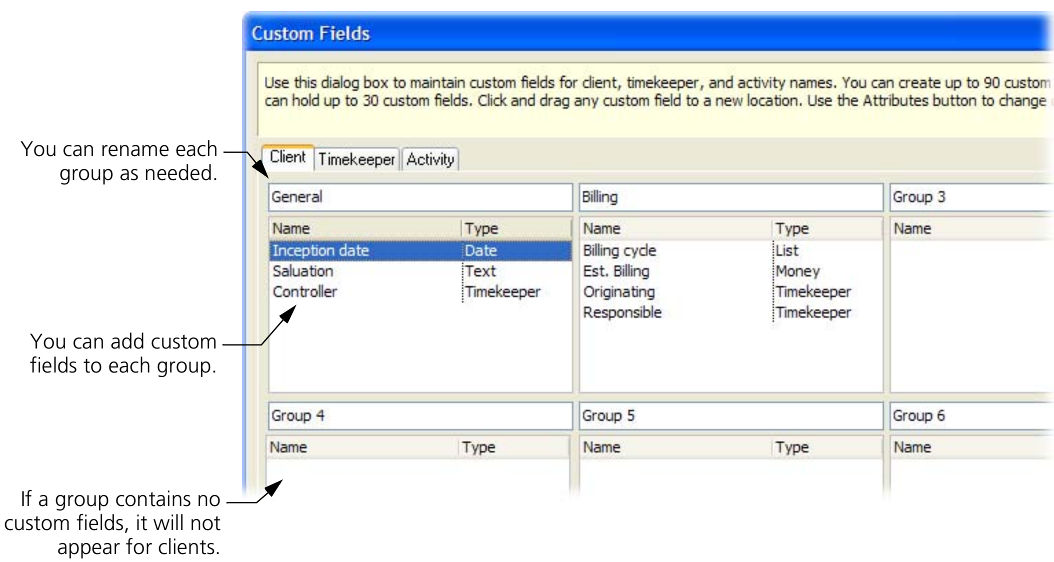
You can use the *Custom Fields* dialog box (select **Setup; Custom Fields**) to maintain custom fields.

Custom fields will appear on the *Custom* page for each name. For example, custom fields for clients will appear within the *Custom* page of the *Client Information* dialog box.

For more information on setting up custom fields, look up "**custom fields**" in the Sage Timeslips Help index.

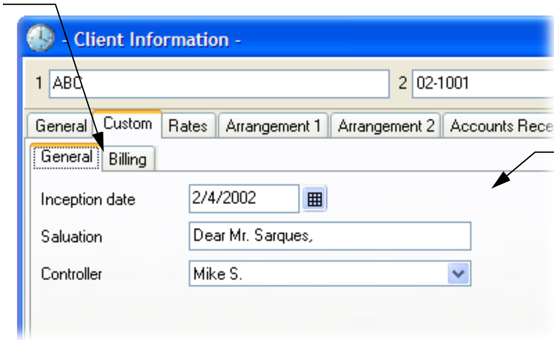
Custom field groups

Within the *Custom Fields* dialog box (select **Setup; Custom Fields**) you can now organize custom fields using up to six groups.



When entering information for clients (in the *Client Information* dialog box), the custom fields will be organized into separate tabs on the *Custom* page.

Each custom field group will show up as a separate tab…



…and will include the fields you placed in the group.

Help

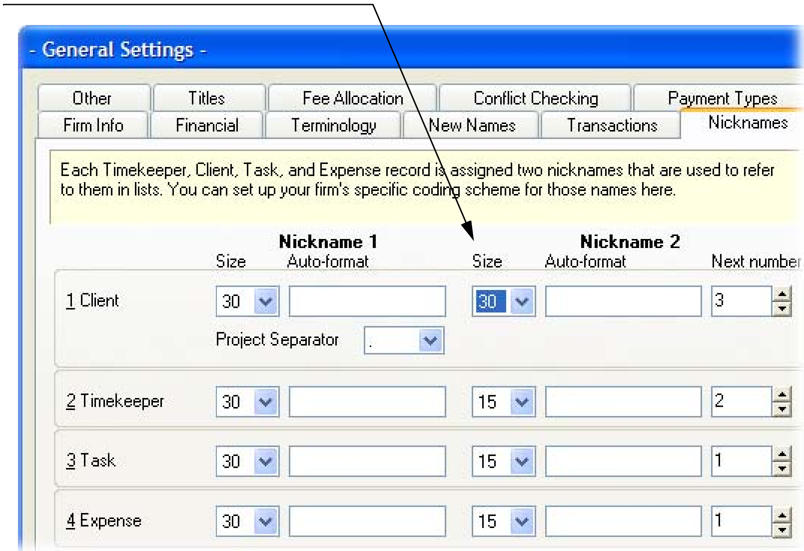
For more information on setting up custom fields, look up "**custom fields**" in the Sage Timeslips Help index.

Increase the length of secondary nicknames

Nickname 2 (secondary nicknames) for clients, timekeepers, tasks, and expenses can now be up to 30 characters long.

You can change this setting on the *Nicknames* page of the *General Settings* dialog box (select **Setup; General**).

You can change the maximum size of Nickname 2 for any name type.



The increased length of Nickname 2 will now be reflected through Sage Timeslips, in dialog boxes and on reports.

Help

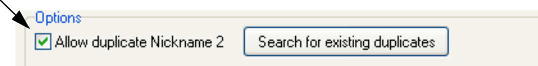
For more information on setting up nicknames, look up "**general settings**" in the Sage Timeslips Help index.

Allow or prevent duplicate secondary nicknames

You can now prevent users from entering duplicate secondary nicknames.

You can change this setting at the bottom of the *Nicknames* page of the *General Settings* dialog box (select **Setup; General**).

Choose if you want to accept duplicate nicknames.



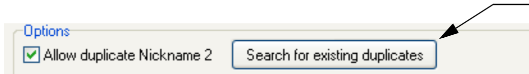
Help

For more information on setting up nicknames, look up "**general settings**" in the Sage Timeslips Help index.

Review duplicate secondary nicknames

For existing names, Sage Timeslips can review all secondary nicknames and present a report of clients, timekeepers, tasks, or expenses that share a duplicate nickname.

You can access this report at the bottom of the *Nicknames* page of the *General Settings* dialog box (select **Setup; General**).



Optionally search for duplicates in current secondary nicknames.

Help

For more information on setting up nicknames, look up "**general settings**" in the Sage Timeslips Help index.

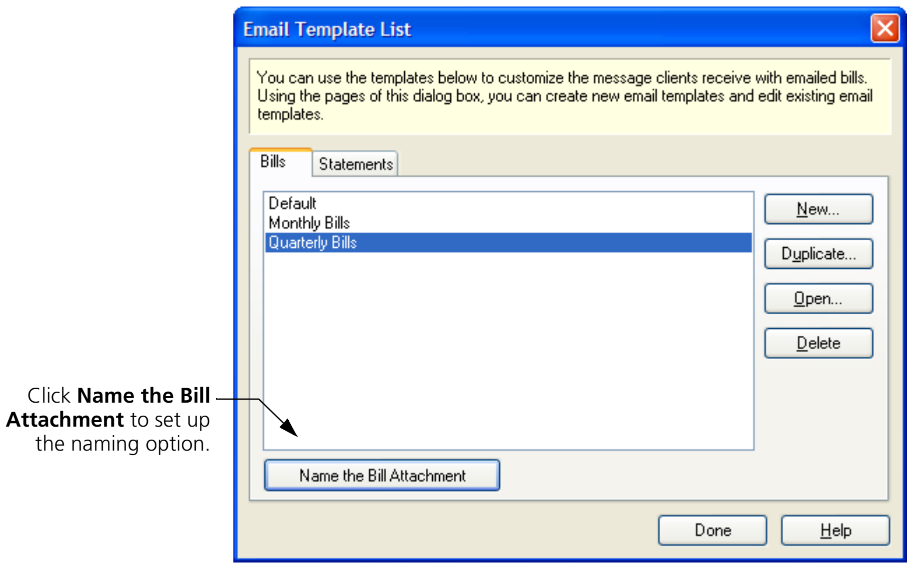
Enhanced billing

This release provides the following new and enhanced features for generating and sending.

Custom PDF names for bills or statements

When sending bills or statements by email, you can now control the name of the PDF attachments.

Select **Setup; Email Templates** to access templates used for sending bills and statement by email.

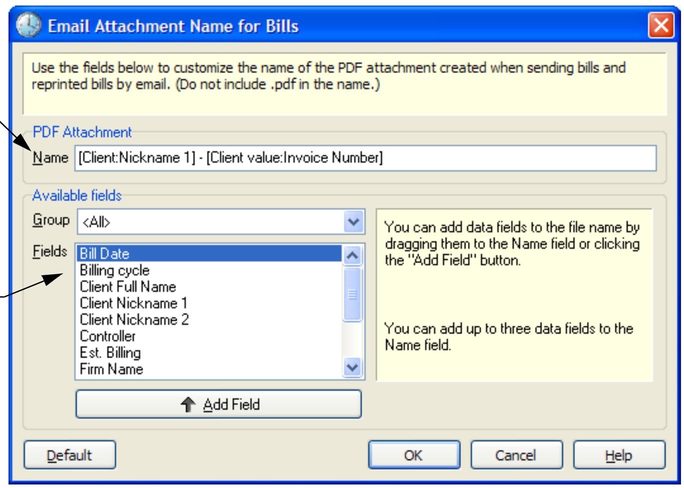


Click **Name the Bill Attachment** to set up the naming convention to use for all bills sent by email.

In the *Email Attachment Name for Bills* dialog box, you can use simple text, data tokens, or a combination of both to ensure each PDF attachment has a unique name. This is useful when a client receives a new attachment each month and saves it on their computer.

You can include text and data tokens in the PDF name.

You can choose data fields from the list to add to the attachment Name.



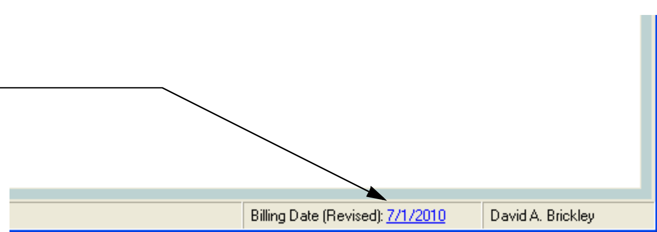
Help

For more information on naming email templates, look up "**sending bills to clients by email**" in the Sage Timeslips Help index.

Access current billing date from status bar

Quickly review or change the current billing and aging date at the bottom of the Sage Timeslips window. This date is used to age past balances and to calculate interest.

You can click on the date to change the current billing and aging date.



Help

For more information on the billing and aging date, look up "**aging date**" in the Sage Timeslips Help index.

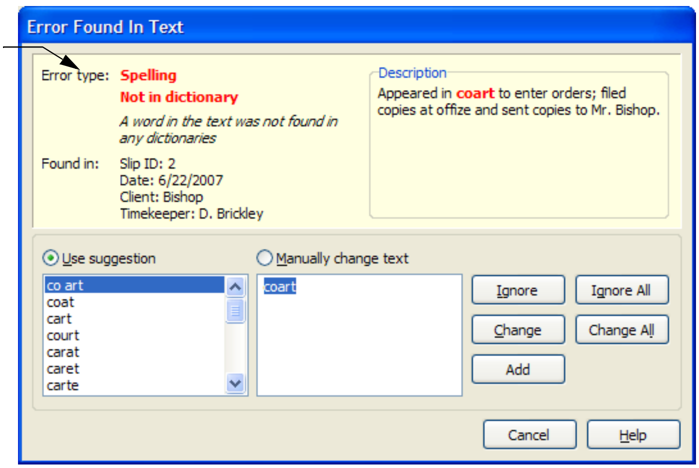
Spelling and Grammar

This release provides the following new and enhanced features for checking for spelling and grammar errors.

Additional information about errors

When a spelling or grammar error is found, Sage Timeslips now provides more information about each error, such as the error type, the record it was found on, and the context of the error.

Errors now include comprehensive information about issues found.



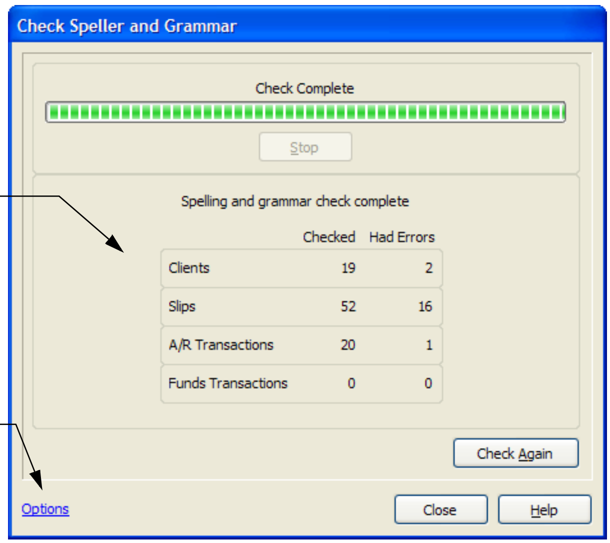
For more information on the spelling and grammar checking, look up "**spelling errors**" in the Sage Timeslips Help index.

Summary of Checking Process

When searching for spelling or grammar errors, Sage Timeslips now provides a summary of the types of records checked, number of records checked, and the number of errors processed.

After checking for errors, you can view a summary of the records checked and errors found.

You can quickly access spelling and grammar options.




Help

For more information on the spelling and grammar checking, look up "**spelling errors**" in the Sage Timeslips Help index.

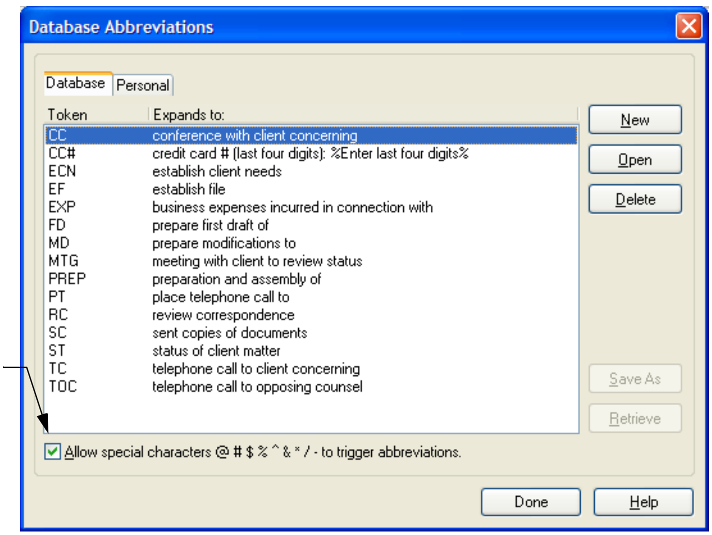
Settings

This release provides the following new and enhanced features for setting up Sage Timeslips.

Special Symbols in Abbreviations

You can now choose if special characters (@ # $ % * / -) as part of the abbreviation token or if the special characters should trigger abbreviations instead.

You can quickly access spelling and grammar options.



This is useful if you want to include special characters as part of the abbreviation tokens (such as CC# or $D).

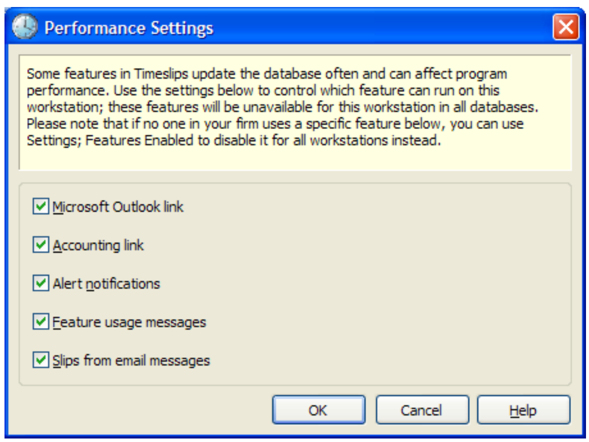

Help

For more information on the triggering abbreviations, look up "**abbreviations**" in the Sage Timeslips Help index.

Workstation Performance

In network installations, you can now disable performance-intensive features on specific workstations.

This is useful, for example, if only some workstations link to Outlook or receive slips by email. Those workstations can disable these features, while other stations accessing the same database can still take advantage of synchronizing names or receiving slips.



For more information on these performance settings, look up "**disabling features**" in the Sage Timeslips Help index.