

Timeslips Intermediate Training Outline

This training session assumes that the attendee has mastered the basics of setting up clients, timekeepers, and activities. The attendee should be able to enter a time and/or expense slip with ease.

In this class, we will investigate more advanced features of the program and how they can be utilized. Timeslips is a versatile program that easily adapts to a variety of billing requirements. A one-on-one class is recommended if you need to discuss specific firm requirements or issues. The average length of this class is 2 to 3 hours depending on the number of attendees.

Client Information:

- Use Set up to create new client defaults
- Create templates
- Making use of Custom fields
- Changing Client Classification
- Using Rate Selection Rules
- How and when to use various Bill Arrangements
- Setting up clients to receive automatic mark up or mark down on specific activities
- Set up client for automatic payment from client funds
- Assign one or two custom messages to automatically appear on a client's bill.

Timekeeper Information:

- Setting up a minimum number of hours
- Require slip approval
- Using the "My List" option

Time Entry:

- Using the Timer in the System Tray
- Creating and using the Time Sheet entry
- Using Bookmarks

Billing:

- Setting up clients to receive invoices by email
- Using the Billing Assistant to review a client's billing

Transactions:

- Using Deposit Slips
- Enter payments by invoice number
- Transfer payments

Reports:

- Creating and saving customized report criteria to a user-defined “group”
- Creating simple “user-defined” reports

Budgets:

- When can a budget be useful?

Short Cuts:

- Using the Export key
- Using icons on Client Information list
- Using the “drill-down” option when reviewing bills and reports
- Exporting reports to Excel
- Options for the “paperless” office
- Reprint bills options
- Mass update of client rates
- Creating Alerts
- Disabling unused time entry fields
- Using Abbreviations

Maintenance Options:

- Running Data Verification
- Purging
- Archiving
- Backups
- Closing Slips
- Station Administrator