Timeslips Training Class Tips and Tricks

This course is ideal for the Timeslips user who wants to learn some advanced features of Timeslips. The course will guide you through the process of customizing Timeslips and provide some, "Tips & Tricks," to getting the most out of your Timeslip Program.

This Training Course is designed to bring you through the process of:

- **Hiding & Closing Data**
  Clients- There may be clients in your database that are paid in full and you will not be entering slips for them at this time. You do not want to delete them, so make them inactive. The client's information is still in the system but it is made invisible until a decision can be made.

  Slips- Rather then purge and archive your slips, close them. This feature allows you to," tuck," your slips away and remove them from the slip file, while allowing yourself access to them through reporting.

- **Deleting Obsolete Data**
  Clients- - If you have no further use for a timekeeper, client, task, or expense name, marking the name as Closed allows you to use the Purge dialog box to remove the name.
  Slips- Purging slips that are no longer needed.

- **Reports**
  Do you run the same reports on a monthly and yearly basis? Why not create your own report tabs to house the selected reports?

- **Timeslips Today**
  Customizing Timeslips Today to bring the information that you need at a glance without having to do reports or open multiple dialog boxes?

- **Protecting your data**
  Defining your backup schedule.

- **Making Corrections**
  Billing Assistant- offers an insight into each client's up-to-the-minute status and every detail that contributes to the calculation of the client's next bill. This tool is like an editable pre-bill worksheet that lets you make corrections to the information that appears on the bill.

- **Audit Trails & Data Entry Assistant**
  Do you want a way to track the slips and transactions that you have entered on a daily basis to check your work? Data Entry Assistant enables you to track your own work and print a report to view at the end of the day.

  Do you want to track the history of changes to names and transactions in the Timeslips database and log who was responsible for those changes? Use Audit Trails to view this information.

- **Security**
  Security lets you establish system-wide and individual rights to users to prevent access to certain parts of the program.

  Mini Timeslips- Do you have users who only need to enter time and expenses; Mini Timeslips provides a compact version of the program and eliminates the need for extensive security settings.

- **Features Enabled**
  Timeslips may include features that you will not use and they are in the way of how you use the program. You can hide any features included with Timeslips by using the Features Enabled.

- **Customizing Your Navigator**
  Do you want to customize some of an existing navigator's button labels to be more meaningful to your business or delete buttons that you do not use? The Navigator Editor will allow you to customize the navigator to your liking.

- **Creating your own preferences**
  Tailor Timeslips to fit your needs by creating personal preferences so the program will do certain tasks in a way in which you prefer.