Sage Timeslips Go: User's Guide

Last Revision: Apr 23, 2026

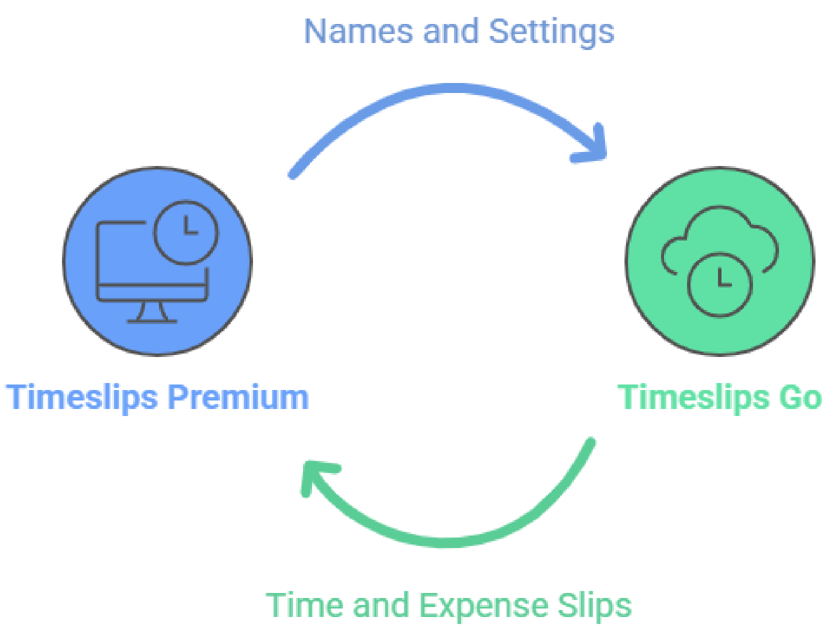
WELCOME TO SAGE TIMESLIPS GO

Timeslips Go is an add-on subscription to Timeslips Premium. Timeslips Go allows your timekeepers to track their time and expenses through a web browser while away from the office.

All your names from Timeslips Premium are transferred to Timeslips Go, so you don't have to re-enter them. You can enter slips in many of the same ways you do in Timeslips Premium, such as through the Slip Entry screen, using a weekly time sheet that resembles a spreadsheet grid, or using a day-at-a-time view that graphically shows the gaps in your work day. You can even access a smaller version of Timeslips Go through your phone's browser so you don't have to wait until you're back at a workstation.

Several slip-related settings from Timeslips Premium are also sent over to Timeslips Go, so rules such as your firm's slip restrictions are in place to ensure your timekeepers are following your firm's policies for time and expense entry.

When you complete slips and they're ready for billing, you can transfer all or some of them to Timeslips Premium in order to generate bills. At any point in your slip-entry and billing cycle, you can transfer new or updated names and settings from Timeslips Premium to Timeslips Go so all Timeslips Go timekeepers can access the most up-to-date names and settings.



PREPARING TO USE TIMESLIPS GO

Before you can set up Timeslips Go for your firm, there are a few initial steps to complete:

- Install the latest update of Timeslips Premium
- Use the invitation email from Sage to activate Timeslips Go
- Enable Two-Factor Authentication (2FA) and log into Timeslips Go
- Connect Timeslips Go with Timeslips Premium

After completing these steps, move on to the next section, Setting Up Logins and Timekeepers, where you will continue setting up Timeslips Go and transfer names from Timeslips Premium

Download and install the latest update for Timeslips Premium

If you have not yet installed the latest update of Timeslips Premium, the person in your firm who is responsible for installing product updates should download the patch from here to update Timeslips Premium:

https://us-kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=221924850014402

Follow the steps in this knowledgebase article above to update Timeslips Premium.

Please note the following:

- When updating a multi-user installation, you should apply the patch at the Timeslips Server.
- All workstations should exit Timeslips Premium before applying the patch.
- The update process will update each workstation as each user starts Timeslips Premium.

Use the invitation email from Sage to activate Timeslips Go

The main contact for Timeslips Go will receive an invitation email from Sage Solutions Administrator.

1. Before clicking on any link, ensure you are logged out of any SageID product.
2. Locate your Sage Timeslips Go activation email, which was sent by Sage Solutions Administrator.
3. Activate your Sage Timeslips Go Service:
    - In the Sage Timeslips Go activation email, click **Getting Started**. This will open your default browser to the Create Your Account screen.
    - Your email address will be pre-filled. Fill in the remaining fields with correct details and click **Sign Up**.
4. You will receive a 6-digit verification code via email. Copy and paste the code into the browser and click **Continue**.

Enable Two-Factor Authentication (2FA) and log into Timeslips Go

Sage uses two-factor authentication (2FA) to secure your identity and data. It requires two forms of identification before allowing access.

1. Choose a 3rd-party authenticator like Microsoft, Google, or Authy to authenticate your access. Alternatively, you can opt for text-based verification.
2. Set up the Authenticator app (for example: Microsoft).
    - In the Microsoft Authenticator app, click the + icon to add an account, select Other Account.
    - Use the app to scan the QR code shown in the browser.
    - Enter the 6-digit code from the Microsoft Authenticator and click **Continue**.
3. After successful authentication, a recovery code will be provided. Save it in a secure location in case you need to recover access in the case of device loss or changed phone number.
4. After this setup is completed, you should be automatically logged into Timeslips Go. If not, return to the activation email and click **Get Started** again to log in with your email and password.

Connect Timeslips Go with Timeslips Premium

1. Log into Timeslips Go. In the upper right corner, click on your initials and select **Go Desktop Link**. In the Link to Sage Timeslips Premium screen, click the Copy button in the bottom left corner to copy the account token.
2. Open Timeslips Premium. Select **Special** > **Timeslips Go**. In the Sage Timeslips Go screen, right-click in the blank field toward the bottom of the screen and paste the account token.
3. Click **Save and Test Connection**. After receiving the message that Timeslips Go is linked, click Done. Timeslips Premium will display the Sage Timeslips Go dashboard.

SETTING UP LOGINS AND TIMEKEEPERS

Timeslips Go logins allow your timekeeper to access Timeslips Go to enter their time and expenses. You will need a separate login for each timekeeper that needs to access Timeslips Go. You must associate each Timeslips Go login with a timekeeper in Timeslips Premium.

Each login will be associated with a timekeeper in Timeslips Premium. The number of logins you've included in your subscription determines how many timekeepers can use Timeslips Go. Contact our Sales group at **800-285-0999** if you need to increase the number of logins on your account.

Adding Timeslips Go logins to your account

After you set up your initial Administrator login for Timeslips Go, you can invite other logins. Only Timeslips Go administrators can use the User Management portal to maintain logins for Timeslips Go.

1. Visit **go.sagetimeslips.com** to open the Timeslips Go site.
2. Log in with your administrator credentials.
3. Click on your initials in the upper right corner of the screen to open the login menu.
4. Select **User Management** to review your current logins.
5. At the top right of the screen, click **Create user** to add another login.
6. After entering the new user's information at the top of the screen, mark the areas that the new login can access.
    - Marking **Sage Timeslips Go** allows the new login to access the Timeslips Go site.
    - Marking **Sage User Management** allows the new login to access this screen where they can manage logins.
7. After entering this information, click **Invite**. This new login will receive an email invitation to join Timeslips Go.
8. If the new login should also be an administrator – so they can view slips of other logins – then mark them as an administrator. To do this, click **Options** at the top of the screen, choose **Select Administrators**, and then mark the checkbox in the **Admin** column for this login.

Administrator abilities

When you mark a login as an Administrator, they have some abilities not available to other logins:

- manage users/logins (login menu > **User Management**)
- maintain security settings for other users (login menu > **Security**)
- maintain settings (main menu > **General Settings**)
- view and edit other users' time and expense entries in Slip Entry, Day View, Timesheet
- review other users' time and expense entries in reports and Monthly Overview

Associating Timeslips Go logins with Timeslips Premium timekeepers

When you invite a login to Timeslips Go, Sage will send them an email with steps to follow. The new login will have to complete those steps, verify their email, and then set up two-factor authentication before you can associate the new login with a Timeslips Premium timekeeper.

After the new login follows the steps and accesses Timeslips Go, an administrator can associate the login with a Timeslips Premium timekeeper.

1. Within Timeslips Premium, select **Special** > **Timeslips Go** to open the Timeslips Go dashboard. If the dashboard was already open, click Refresh at the top right corner.
2. Within the Logins section at the top, the new login will be included in the list.
3. If the new login is listed as Unassigned, then select **Names** > **Timekeeper Info** and double-click on the associated timekeeper to view the settings for that timekeeper.
4. In the Sage Timeslips Go field, enter the email address of the new login; it is listed on the dashboard for easy reference.
5. Save the timekeeper and return to the dashboard.
6. Click Refresh at the top right corner and the login list should reflect your change.

If you have additional new logins, you can set them up before your initial transfer; if you add or remove logins later you can run the transfer process again to update logins.

Transferring Names from Timeslips Premium to Timeslips Go

After you have associated logins with timekeepers, you can transfer names to Timeslips Go. The following steps show how to transfer names.

The Transfer process is covered more extensively later in this guide (see the "TRANSFERRING DATA" chapter).

1. Within Timeslips Premium, select **Special** > **Timeslips Go** to open the Timeslips Go dashboard. If the dashboard was already open, click the **Refresh** button at the top right corner.
2. Within the Transfer section of the dashboard, mark the first option: **Only update names and settings**.
3. Click the **Transfer** button at the bottom of the dashboard.
4. The transfer process will show the changes it will make to Timeslips Go. Optionally, print a log of the changes and then click **Yes** to transfer names.
5. After the transfer is complete, have any new logins log out of Timeslips Go and then back in, so any settings related to the timekeeper are applied appropriately in Timeslips Go.

Troubleshooting Logins

If some timekeepers are having trouble logging in, administrators can use the Timekeeper Login Accounts screen to troubleshoot their logins. To open this screen, administrators can click their initials in the top right corner of the screen and choose **Timekeeper Login Accounts**.

This screen lists each timekeeper in the database with columns for their email address, role (which indicates if they are an admin), last login date, timekeeper classification (which indicates if the timekeeper has been closed), and current status. For any timekeeper with a problem, instructions are provided indicating how to correct the problem.

Updating Login Settings

At any time, timekeepers can update settings related to their Sage Login (also known as their SageID account), such as their password, two factor authentication (2FA) method, email address, and other details. To access these settings, click on your initials in the top right corner of the screen to access the Login menu and then select **My SageID Account**.

SETTING UP OTHER NAMES AND SETTINGS IN TIMESLIPS GO

Timeslips Go is an extension of Timeslips Premium; Timeslips Go relies on names and settings that you've established and maintained in Timeslips Premium. The transfer process will send names and settings from Timeslips Premium to Timeslips Go, so you can use them when creating time slips and expense slips in Timeslips Go.

Names and related settings from Timeslips Premium

When creating time and expense entries Timeslips Go, you will use names that you maintain in Timeslips Premium.

The transfer process will establish clients, references, tasks, and expenses in Timeslips Go (see the "TRANSFERRING DATA" chapter later in this guide for more information). Whenever you make changes to names in Timeslips Premium, you can run the transfer process again to update names in Timeslips Go.

- **Timekeepers** – You can establish timekeepers in Timeslips Go using the steps in "Setting Up Logins and Timekeepers", earlier in this guide. Timeslips Go relies on timekeeper settings such as nicknames, email addresses, and timekeeper billing rates. You maintain these timekeeper-related settings in Timeslips Premium within Timekeeper Information (select **Names** > **Timekeeper Info**).
- **Clients** – Timeslips Go relies on client settings such as nicknames, client status fields, client billing rates and rate rules, and client references. You maintain these client-related settings in Timeslips Premium within Client Information (select **Names** > **Client Info**).

  While you will typically rely on Timeslips Premium for names, you can quickly add new clients and references in Timeslips Go and then transfer them to Timeslips Premium. See "Working with Clients and References" later in this guide for more information.
- **Tasks** – Timeslips Go relies on task settings such as nicknames, task billing rates and rate types, and slip-making defaults. You maintain these task-related settings in Timeslips Premium within Task Information (select **Names** > **Task Info**).
- **Expenses** – Timeslips Go relies on expense settings such as nicknames, prices, and slip-making defaults. You maintain these expense-related settings in Timeslips Premium within Expense Information (select **Names** > **Expense Info**).

Other settings from Timeslips Premium that affect Timeslips Go

Many other settings in Timeslips Premium will transfer to Timeslips Go to help follow rules you've already established.

- **Firm name** – You establish your firm name in the Address Information page of General Settings in Timeslips Premium (select **Setup > General**). This name appears at the top of reports that you print in Timeslips Go.
- **Slip restrictions** – You can set up restrictions in the Slips, A/R, & Funds page of General Settings in Timeslips Premium (select **Setup > General**). These restrictions can govern acceptable dates and time amounts on slips entered in Timeslips Go.
- **Database Abbreviations** – You can set up abbreviations in Database Abbreviations in Timeslips Premium (select **Setup > Abbreviations**). These abbreviations can help speed up entry of slip descriptions. Timeslips Go will only transfer Database Abbreviations from Timeslips Premium but not Personal Abbreviations, but timekeepers can optionally set up their own personal abbreviations in Timeslips Go (see "Setting up Personal Abbreviations" later in this guide for more information).
- **First month of your fiscal year** – You can establish the first month of your fiscal year in the Aging Periods page of General Settings in Timeslips Premium. Timeslips Go will use this setting when you use relative dates on date filters (such as printing a report for this year).
- **First day of your fiscal week** – You can establish the first day of your fiscal week in the Aging Periods page of General Settings in Timeslips Premium. Timeslips Go will use this setting within the Timesheet and when you use relative dates on date filters (such as printing a report for this week).

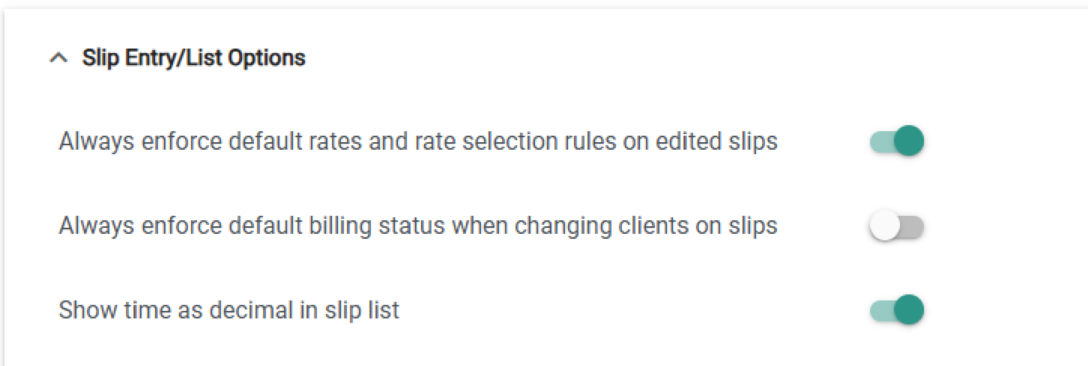
General Settings in Timeslips Go

Administrator accounts can use the General Settings screen to control access to some fields, screens, and functionality for the entire firm. Administrators can select **main menu > General Settings** to open the General Settings screen.

The following settings are available here:

Slip Entry / List Options

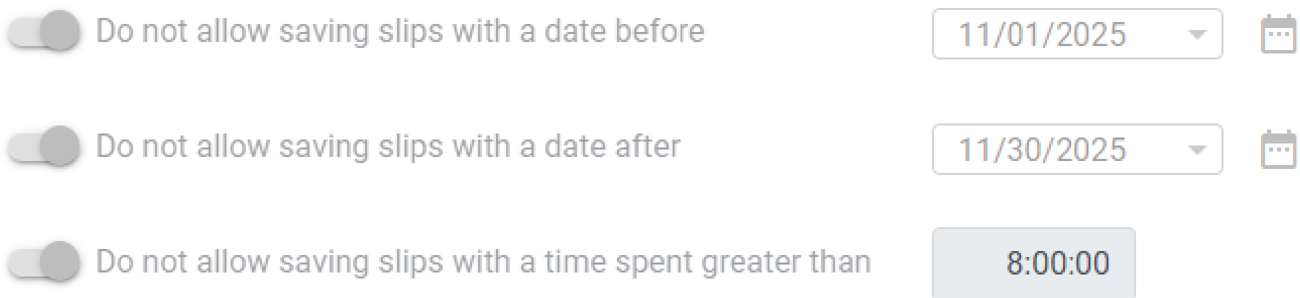
These additional settings affect editing slips in Slip Entry and showing time formats on Slips list for all timekeepers.



- **Always enforce defaults rates and rate selection rules on slips** – When marked, Timeslips Go will reevaluate and reapply rate settings and rate rules if you edit the names on a slip.
- **Always enforce default billing status when changing clients on slips** – When marked, Timeslips Go will reevaluate and reapply the slip's billing status if you edit the client on a slip.
- **Show time as decimal in slip list** – When marked, time values on the Slips page (**main menu > Slips**) will show in HH.DD format, otherwise they will show in HH:MM:SS format.

Slip Restrictions

You can define slip restrictions in Timeslips Premium to control the allowable dates and time spent for slips. These settings are found under **Setup** > **General** > **Slips, A/R, & Funds**. They're automatically transferred to Timeslips Go, where they control what's allowed when creating new slips. You can't change these rules in Timeslips Go, but you can view them there to keep the limits in mind.



- **Do not allow saving slips with a date before** – Restricts entry of new slips by date. Timekeepers will not be able to enter slips that have a date earlier than this date.

  For example, you may want to prevent timekeepers from entering slips for a prior billing period.

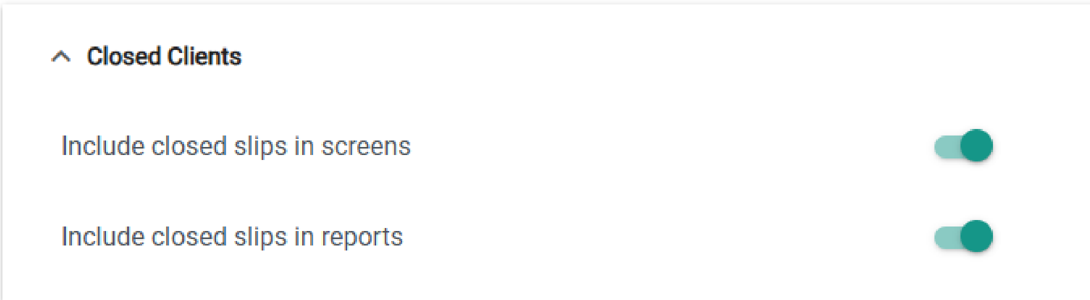
- **Do not allow saving slips with a date after** – Restricts entry of new slips by date. Timekeepers will not be able to enter slips that have a date after this date.

  For example, you may want to prevent timekeepers from entering slips for future dates.

- **Do not allow saving slips with a time spent greater than** – Restricts entry of new slips by time spent. Timekeepers will not be able to enter slips that have a time spent greater than this value.

Closed Clients

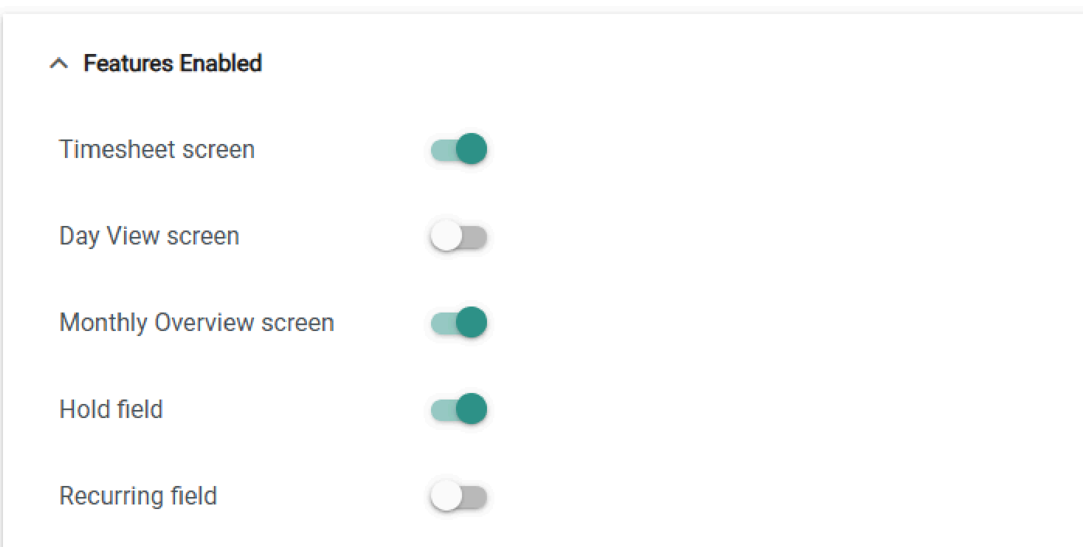
When you set clients to Inactive or Closed in Timeslips Premium and you've retained their transferred slips in Timeslips Go, you can choose to view or hide those slips in Timeslips Go.



- **Include closed slips in screens** – When marked, retained slips for closed clients will show in the Slips screen.
- **Include closed slips in reports** – When marked, retained slips for closed clients can show in reports.

Features Enabled

These additional settings can hide fields and screens for all timekeepers.



- **Timesheet screen** – Unmark this setting to prevent access to the Timesheet screen for all logins in your firm. The **Timesheet** command on the main menu will be hidden.
- **Day View screen** – Unmark this setting to prevent access to the Day View screen for all logins in your firm. The **Day View** command on the main menu will be hidden.
- **Monthly Overview screen** – Unmarking this option hides the Monthly Overview command from the main menu and hides the Monthly Overview screen.
- **Hold field** – Unmark this setting to hide the Hold field within the Slip Entry screen.
- **Recurring field** – Unmark this setting to hide the Recurring field within the Slip Entry screen.

Setting up favorite names

In areas like slip entry and setting up report filters, you can show favorite clients, favorite tasks, and/or favorite expenses, instead of showing all names. This helps make data entry or report generation quicker and easier.

You can maintain a list of favorite clients using the Client Favorites screen. From the Home screen, click your initial in the top right corner, then select **Favorites > Client Favorites**.

You can maintain a list of favorite tasks using the Task Favorites screen. From the Home screen, click your initial in the top right corner, then select **Favorites > Task Favorites**.

You can maintain a list of favorite expenses using the Expense Favorites screen. From the Home screen, click your initial in the top right corner, then select **Favorites > Expense Favorites**.

Setting Up Timekeeper Security

Administrators can use the security system to limit access rights for each timekeeper. At the top right of the screen, click your initials and then select **Security** to open the Timeslips Rights screen.

For each timekeeper, the administrator can toggle the switch of any area to the left to prevent access or to the right to provide access. Use the column of New Login Defaults to preset security access for new timekeepers.

The following security areas are available:

- **Edit Existing Slips** – Allows timekeepers to edit existing slips. This affects:
    - Slips screen (main menu > **Slips**)
    - Slip Entry screen (main menu > **Slips**, then open a slip)
    - Day View screen (main menu > **Day View**)
    - Timesheet screen (main menu > **Timesheet**)
- **View and Edit Rates** – Allows timekeepers to view billing rates and slip values on names, slips, and reports. This affects:
    - Slips screen (main menu > **Slips**)
    - Slip Entry screen (main menu > **Slips**, then open a slip)
    - Reports screen (main menu > **Reports**, then print a report)
- **Delete Slips** – Allows timekeepers to delete slips. This affects:
    - Slips screen (main menu > **Slips**)
    - Timesheet screen (main menu > **Timesheet**)
- **Default Slips to Completed** – When creating new slips, this setting determines if the new slip is automatically marked as Completed.
- **Mark Slips as Completed** – This setting determines if the timekeeper can mark slips as Completed.
- **Create expense slips** – Allows timekeepers to create new expense slips or duplicate expense slips. When this option is unmarked, the timekeeper will only be able to create time slips. This security setting affects:
    - Slips screen (main menu > **Slips**)
    - Slip Entry screen (main menu > **Slips**, then open a slip)
- **Change Bill Status** – Allows timekeepers to change the billing status on a time slip or expense slip. Time slips get their default billing status from the task in Timeslips Premium. Expense slips get their default billing status from the expense in Timeslips Premium. This security setting affects:
    - Slips screen (main menu > **Slips**)
    - Slip Entry screen (main menu > **Slips**, then open a slip)
- **Allow Slip Creation on Restricted Clients** – Allows timekeepers to create slips for restricted clients. *Restricted clients* are clients who have "Restrict Slip Entry" marked in Timeslips Premium. When marked, timekeepers will be warned when creating these slips; when unmarked timekeepers will be prevented from creating these slips. This security setting affects:
    - Slips screen (main menu > **Slips**)
    - Slip Entry screen (main menu > **Slips**, then open a slip)
    - Day View screen (main menu > **Day View**)
    - Timesheet screen (main menu > **Timesheet**)
- **Allow Slip Creation on Restricted Dates** – Allows timekeepers to create slips for restricted dates. *Restricted dates* are defined within General Settings in Timeslips Premium.
  When marked, timekeepers will be warned when creating these slips; when unmarked timekeepers will be prevented from creating these slips. This security setting affects:
    - Slips screen (main menu > **Slips**)
    - Slip Entry screen (main menu > **Slips**, then open a slip)
    - Day View screen (main menu > **Day View**)
    - Timesheet screen (main menu > **Timesheet**)

- **Allow Slip Creation on Restricted Time Spent** – Allows timekeepers to create slips for restricted time spent. *Restricted time spent* is defined within General Settings in Timeslips Premium. When marked, timekeepers will be warned when creating these slips; when unmarked timekeepers will be prevented from creating these slips. This security setting affects:
    - Slips screen (main menu > **Slips**)
    - Slip Entry screen (main menu > **Slips**, then open a slip)
    - Day View screen (main menu > **Day View**)
    - Timesheet screen (main menu > **Timesheet**)
- **View Reports** – Allows timekeepers to view, print, and save reports.
  This affects:
    - Reports screen (main menu > **Reports**)
- **Create New Clients and References** – Allows timekeepers to create new clients and references in Timeslips Go that you can download into Timeslips Premium.
  This affects:
    - Clients screen (main menu > **Clients**)
    - **New Clients** command from the top of the screen

Setting up Abbreviations and Abbreviation Cues

Abbreviations allow you to enter a token into a description field and then have other text replace it. This is useful when you have long descriptions that you use often.

Abbreviation cues allow you to enter a token into a description and have a related message display, but not affect the text. This is useful when you want to remind timekeepers of specific policies regarding certain types of time they are tracking.

See: Using abbreviations in descriptions for more information.

From the main menu, select **Abbreviations** to open the Abbreviations screen.

You can use this screen to review and maintain abbreviations and abbreviation cues.

Timeslips Go - Settings - Abbreviations   TH

Token	Type	Expands To	As You Type	On Save
cc	Global	conference call with %party%	Yes	Yes
ccc	Global	confer with client concerning	Yes	Yes
crt	Global	correspondence to	No	Yes
meeting	Global Cue	be sure to enter start and stop times for this	Yes	No
pabc	Personal	Project ABC	No	Yes
pfpi	Global	prepare for / participate in	No	Yes
pxyz	Personal	Project XYZ	No	Yes
rai	Global	request for additional information	Yes	Yes
research	Personal Cue	verify the research time is within the firm's guidelines	Yes	No
rr	Global	review and revise %document%	Yes	Yes
tc	Global	telephone call to client concerning	Yes	Yes
travel	Global Cue	billing for this time is only allowed for specific clients. ple	Yes	No

Creating global abbreviations

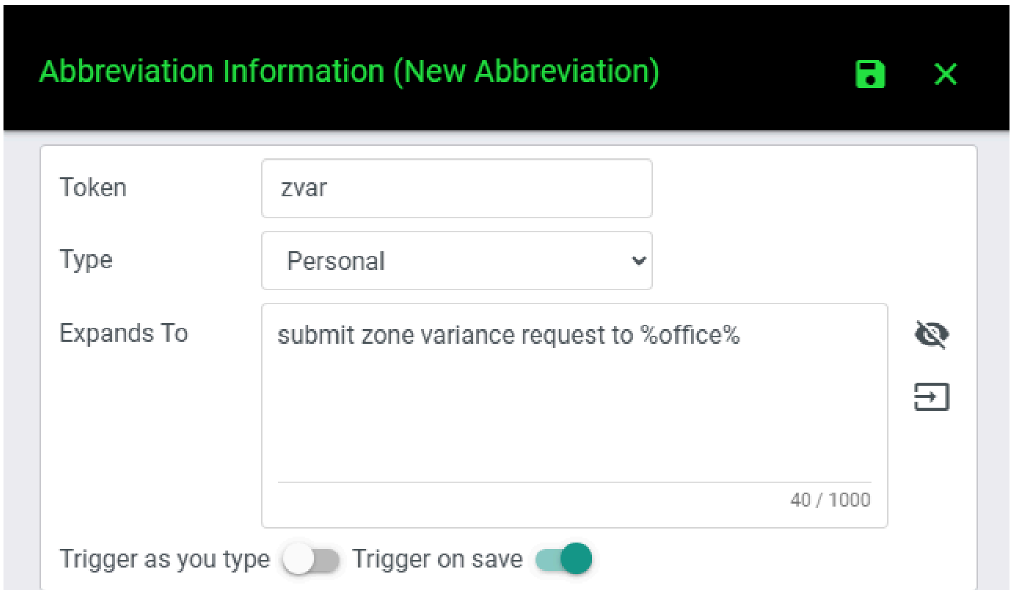
You can create global abbreviations within Timeslips Premium as database abbreviations. (In Timeslips Premium select **Setup** > **Abbreviations**.) Global abbreviations are transferred to Timeslips Go when you do any type of transfer.

Global abbreviations are available for any timekeeper in your firm to use when entering slips in the Slip Entry screen.

Creating personal abbreviations

Personal abbreviations are available only to you; other timekeepers cannot see them. To create a new personal abbreviation in Timeslips Go:

1. Select **Abbreviations** from the main menu on the left to open the Abbreviations screen
2. Click the plus sign (+) at the top right of the screen and choose New Abbreviation to open the Abbreviation Information screen.

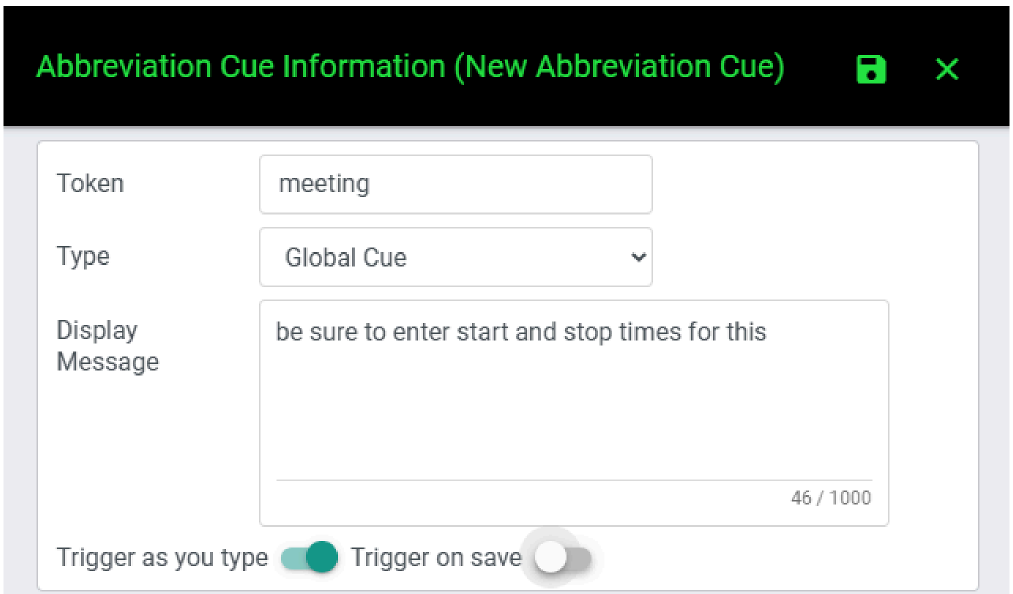


3. Enter the Token and the Expands to text for the new abbreviation. You can include a prompt for the abbreviation (between two % symbols) using the **Insert Prompt** button to the right; when Timeslips Go expands that abbreviation, it will prompt the timekeeper for additional information.
4. At the bottom, choose triggering options. Note you can use the Expand Abbreviations button on the slip if you do not want to expand abbreviations automatically.

Creating global abbreviation cues

Global abbreviation cues are available to display messages for any timekeeper in your firm to use when entering slips in the Slip Entry screen.

1. Select **Abbreviations** from the main menu on the left to open the Abbreviations screen
2. Click the plus sign (+) at the top right of the screen and choose New Abbreviation Cue to open the Abbreviation Cue Information screen.
3. Set the Type to Global Cue.

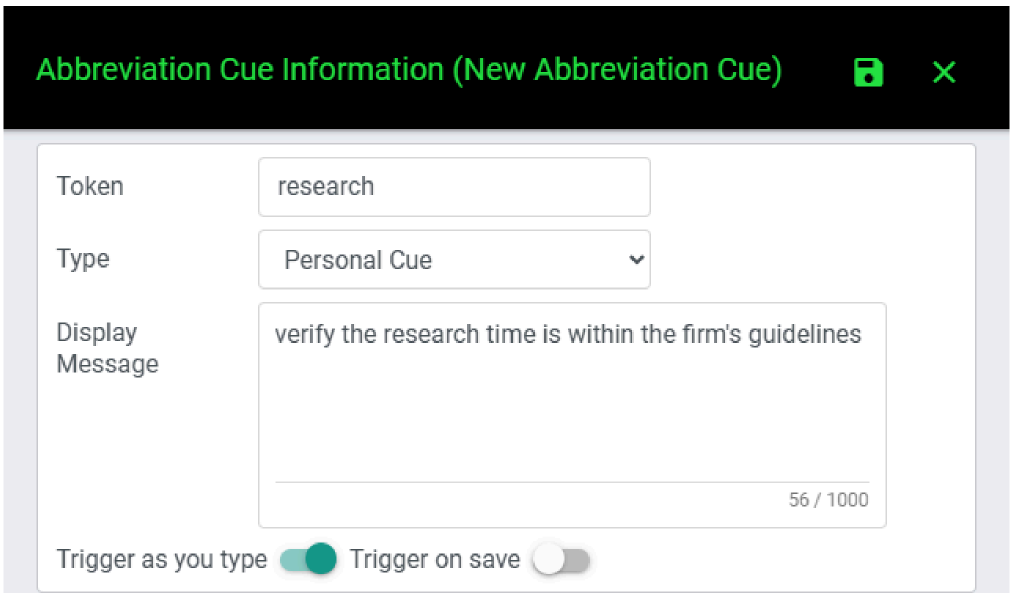


4. Enter the Token and the Display Message text for the new abbreviation cue.
5. At the bottom, choose triggering options. Note you can use the Expand Abbreviations button on the slip if you do not want to display messages automatically.

Creating personal abbreviation cues

Global abbreviation cues are available to display messages only for yourself when entering slips in the Slip Entry screen.

1. Select **Abbreviations** from the main menu on the left to open the Abbreviations screen
2. Click the plus sign (+) at the top right of the screen and choose New Abbreviation Cue to open the Abbreviation Cue Information screen.
3. Set the Type to Personal Cue.



4. Enter the Token and the Display Message text for the new abbreviation cue.
5. At the bottom, choose triggering options. Note you can use the Expand Abbreviations button on the slip if you do not want to display messages automatically.

Printing the abbreviations listing

From the Reports screen (select **Reports** from the main menu on the left), you can print the Abbreviations Listing as a reminder of the abbreviations set up for your firm.

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TSGO Services

Abbreviation Listing

Page 1

Token	Type	Style	Expands To
cc	Global	Abbreviation	conference call with %party%
ccc	Global	Abbreviation	confer with client concerning
crt	Global	Abbreviation	correspondence to
meeting	Global	Cue	be sure to enter start and stop times for this
pabc	Personal	Abbreviation	Project ABC
pfpi	Global	Abbreviation	prepare for / participate in
pxyz	Personal	Abbreviation	Project XYZ
rai	Global	Abbreviation	request for additional information
research	Personal	Cue	verify the research time is within the firm's guidelines
rr	Global	Abbreviation	review and revise %document%
tc	Global	Abbreviation	telephone call to client concerning
travel	Global	Cue	billing for this time is only allowed for specific clients. please check with office admin if you are unsure

ENTERING TIME AND EXPENSES

Viewing time and expense entries

Often, the best way to review information in Timeslips Go is to generate reports. See "GENERATING REPORTS" later in this guide for more information.

Timeslips Go also offers the following screens to help you review time and expense entries:

- **Reviewing time and expense slips on the Slips screen**

  The Slips screen can show all slips for all timekeepers. You can use selection filters to limit the slips displayed. You can also click on column heading to sort the list in ways that may make it easier for you to review the slips.

  From the Slips screen, you can quickly open any slip in the Slip Entry screen to see any additional details for that charge.

  See "Viewing slips on the Slips screen" later in this chapter for more information.

- **Reviewing time entries on the Monthly Overview screen**

  The Monthly Overview screen shows time totals for a specific timekeeper for a specific month. This screen helps timekeepers identify gaps in their month and is a great way to check their entries before the billing administrator generates bills.

  Administrators who have access to slips for all timekeepers can switch the timekeeper displayed on this screen to review totals for each timekeeper as needed.

  From the Monthly Overview screen, you can quickly open any slip in the Slip Entry screen to see any additional details for each time entry.

  See "Viewing time on the Monthly Overview" later in this chapter for more information.

Entering time and expense entries

Because you may need to enter time in varying levels of detail, Timeslips Go offers multiple ways to enter time. This allows timekeepers to choose the method that best meets their needs.

- **Entering detailed time records on the Slip Entry screen**

  Some professionals require a greater level of detail when entering time. For example, some attorneys need to enter detailed descriptive notes for each individual time entry. Using the Slip Entry screen, these professionals can enter as much detail as needed to describe time entries properly. You can also use the Slip Entry screen to enter detailed expense charges.

  See "Creating time slips using the Slip Entry screen" later in this chapter for more information.

  See "Creating expense slips using the Slip Entry screen" later in this chapter for more information.

- **Entering time totals on a timesheet**

  Some professionals will prefer to enter only totals of their time. For example, consultants and other service professionals often do not need to record time in the level of detail that attorneys or accountants require.

  These professionals will often have a greater number of smaller tasks involved in their projects. They can quickly enter their time spent at the end of the day, using the Timesheet screen. This method is also convenient for quickly reviewing many entries at once.

  See "Creating time slips using the Timesheet screen" later in this chapter for more information.

- **Entering time in the Day View**

  For professionals who want to see their days at a glance, they can use the Day View. This is a time sheet you can use to quickly review or enter time for a specific day.

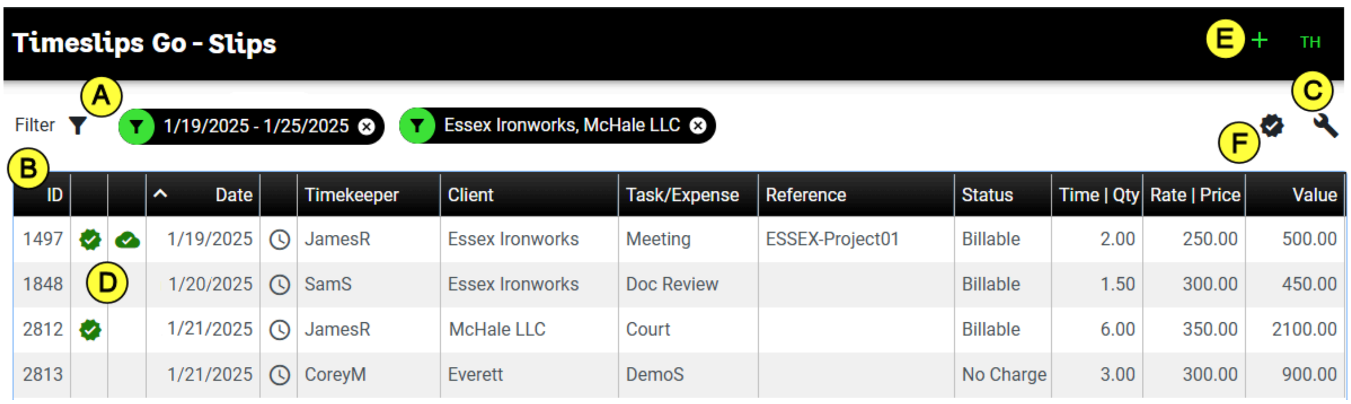
  This view works best for timekeepers who track the start time of each entry so they can easily see the gaps in their day. This timesheet makes adding or editing entries quick and easy, allowing you to drag entries to expand them, or drag and drop to move them.

  See "Creating time slips using the Day View screen" later in this chapter for more information.

Viewing slips on the Slips screen

Many firms will use the Slips screen to review a detailed list of the time and expense slips that their timekeepers enter. This screen lets you quickly filter and sort slips to show exactly what you want to see, and then be able to edit slips or add slips as needed. From the main menu, select **Slips** to open the Slips screen.

The following image provides an overview of the Slips screen:



ID			Date		Timekeeper	Client	Task/Expense	Reference	Status	Time | Qty	Rate | Price	Value
1497			1/19/2025		JamesR	Essex Ironworks	Meeting	ESSEX-Project01	Billable	2.00	250.00	500.00
1848			1/20/2025		SamS	Essex Ironworks	Doc Review		Billable	1.50	300.00	450.00
2812			1/21/2025		JamesR	McHale LLC	Court		Billable	6.00	350.00	2100.00
2813			1/21/2025		CoreyM	Everett	DemoS		No Charge	3.00	300.00	900.00

A - By default, the Slips screen will show all of your slips. If you are an administrator, it will show slips of other timekeepers in your firm. If you want to limit what is displayed, you can click the **Filter** button on the left side above the list. For example, you can filter the list to show slips for specific clients and specific dates. To remove filters quickly, click the **x** on the right of any existing filter.

B - Several columns are shown for each slip; each one represents a field on the time or expense slip. You can change the order of the slips displayed in the list by clicking on a column heading.

C - You can choose which columns are shown in the list, in which order they appear, what colors are used, and more. For example, you can show part of the Description for each slip on this list. Click the **Customize List** button on the right side above the list to access these options.

D - Each slip is represented by a single row on the slip list. Some fields may be hidden due to security rights assigned to you.

Some information is graphical, like the slip type (a clock for time slip and a tag for expense slip), Complete status (badge with a checkmark), the Transfer status (cloud with a checkmark).

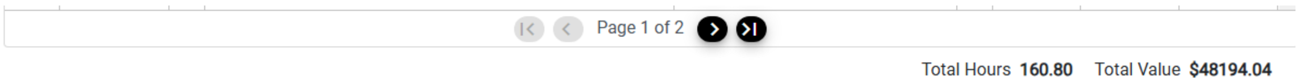
You can view all details of any slip by double-clicking on the slip from the list. This will open the Slip Entry screen for that slip.

E - To create a new time or expense slip, click the plus sign above the list.

F - You can click the **Complete Slips** button to complete all slips included on this page of the Slips list.

Navigating through slips

The bottom of the Slips screen includes navigation controls to move through screens of slips. You can optionally click on the Page heading to jump to a specific page of slips.



Slip totals

The bottom of the Slips screen also includes totals of the slips currently displayed. You can optionally click on the totals to open more details about these values.

Viewing time on the Monthly Overview

Some timekeepers want a month-by-month overview of their time. The Monthly Overview provides a snapshot in a familiar calendar view, helping them quickly find gaps in the time they entered. Expense totals are not shown in the Monthly Overview.

From the main menu, select **Monthly Overview** to open the Monthly Overview screen.

The following image provides a summary of the Monthly Overview screen:

A - The Monthly Overview shows time for a specific month. You can click the < or > buttons or press the left-arrow or right-arrow keys to move to another month.

B - Click the Refresh button to load the most up-to-date data. This is useful when you have multiple timekeepers working in Sage Timeslips, where other timekeepers may be adding or editing time.

C - Click the Change Timekeeper button to review time for another timekeeper. You will see the current timekeeper listed in the total **(H)** at the bottom of the overview. See your system administrator if this button is not visible; you may not have rights to see other timekeepers' slips. (See "Setting Up Timekeeper Security" earlier in this guide for more information.)

D - Click the Options button to open the Options screen, where you can access settings to customize the Monthly Overview. See "Customizing the Monthly Overview" in the next section for more information.

E - The Monthly Overview lists time for each timekeeper in a view similar to a page of a calendar. The first day shown for each week is controlled by the "First day of your work week" setting in the Financial and Billing Rules section of the General Settings screen.

F - Each cell will show a value when the current timekeeper has time entered for that day. Clicking on a value in a cell will open the details for the slips for that day.

You can customize the colors used for weekdays in the selected month by changing the Weekday options within the Options screen **(D)**. You can also show the total number of slips in the bottom right corner, which make up the total hours.

G - You can customize the colors used for weekends in the selected month by changing the Weekend options within the Options screen **(D)**.

H - You can customize the colors used for days outside of the selected month by changing the Non-month options within the Options screen **(D)**.

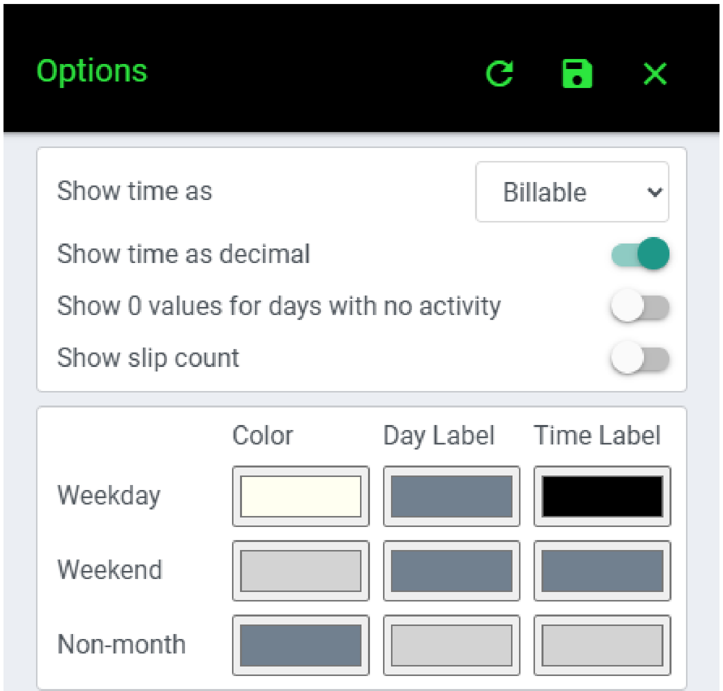
I - The right-most column will show the total of each week. Within the Options screen **(D)**, you can choose to show only Billable hours, Unbillable hours, or Total hours for timekeepers.

J - The total hours for the month will show below the overview on the left. The name of the current timekeeper and the type of hours shown will be included in the name of the total. Within the Options screen **(D)**, you can choose to show only Billable hours, Unbillable hours, or Total hours for timekeepers.

K - The total hours for all the displayed weeks, which often includes some days outside the current month, will show below the overview on the right. Within the Options screen **(D)**, you can choose to show only Billable hours, Unbillable hours, or Total hours for timekeepers.

Customizing the Monthly Overview

Click the **Options** button above the Monthly Overview to customize this screen. It contains the following settings:



- **Show time as** – determines if you are showing totals for Billable, Unbillable, or Total hours.
- **Show time as decimal** – mark this option to show time in HH.DD format, otherwise show time in HH:MM:SS format.
- **Show 0 values for days with no activity** – mark this option to show 0.00 or 0:00:00 in the center of the day when there are no matching slips for the day, otherwise show blank.
- **Show slip count** – mark this option to show the slip count for matching slips for the day in the lower right corner, otherwise show blank.
- **Weekday** – choose colors for the cells, date, and time for weekdays in the selected month.
- **Weekend** – choose colors for the cells, date, and time for weekends in the selected month.
- **Non-month** – choose colors for the cells, date, and time for days outside the selected month.

Creating time slips using the Slip Entry screen

Most professionals need to enter time and expenses with a lot of detail. Timeslips Go provides the Slip Entry screen for these timekeepers.

You can use this screen to enter time slips and expense slips. The slip type (time or expense) determines the fields that appear on the slip.

The basic steps to enter a time slip are:

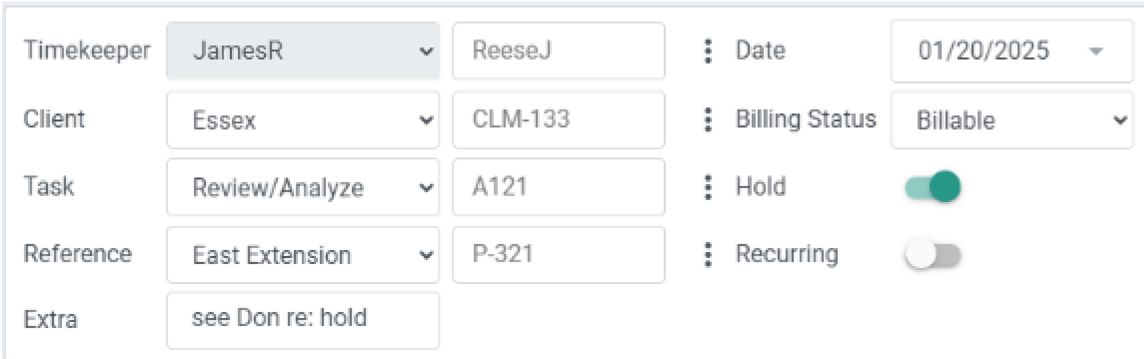
1. From the main menu, select **Slips** to open the Slips screen, showing the current list of time and expense slips.
2. Click the plus sign (+) above the list of slips and select **New Time Slip** to create a new time slip.
3. Enter the details of the slip. This includes the client, the task, the time spent, and the billing rate.
4. Click the **Save** button at the top of the slip.

When entering a time slip, there are several details to view or enter:

Transferred Status / Complete Status / Slip Value

- **Transferred Status** – If a slip has been transferred to Timeslips Premium, a Transferred label will show here. Once a slip is transferred, you can no longer edit it in Timeslips Go.
- **Complete Status** - indicates if the slip is ready to transfer to Timeslips Premium.
- **Slip Value** - the original value of the slip. When using an Hourly rate (see below), the Slip Value is calculated as Time Spent x Rate Value. When using a Flat rate, the Slip Value matches the Rate Value.

Names / Extra / Date / Billing Status / Hold / Recurring

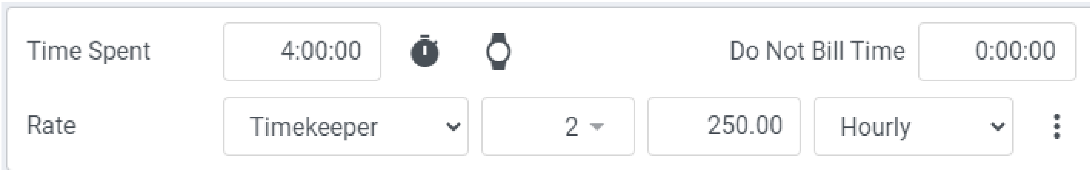


- **Timekeeper** - the person whose time you are billing. Timeslips Go assigns this name automatically based on the current login. You cannot change this name unless you are an administrator.
- **Client** - the person or organization who you are charging for this entry. Within this field, you can start typing to jump to a client or you can click the three dots to the right to view favorite clients. You can also click the three dots to the right to choose which nickname to sort by or to show both nicknames together in the list.
- **Task** - the type of work you are doing for the client. You can click the three dots to the right to view your favorite tasks.
- **Reference** - an optional subcategory for a client, such as a matter. Each client can have a different list of references associated with it. Within Timeslips Premium, you can make references required on a client-by-client basis.
- **Extra** - optional free-form text associated with the slip that you can use for further classification or an internal note.
- **Date** - when this work took place.
- **Billing Status** - determines how the slip is eventually charged on a bill in Timeslips Premium.
    - **Billable** - this is the typical state of a slip; it will appear on a bill to be charged.
    - **Do Not Bill** - this slip is considered unbillable and will not show on a bill. It will not affect the balance due, but the time spent and value will be tracked so you can review analysis reports that show billable vs. unbillable amounts.
    - **No Charge** - this slip is also considered unbillable, but it will show on a bill so the client is aware of it. It will not affect the balance due, but the time spent and value will be tracked so you can review analysis reports that show billable vs. unbillable amounts.
    - **Override** - this slip is considered billable and will appear on a bill. If you set up a billing arrangement for the client in Timeslips Premium, Override slips will not be included in that arrangement's fee.

  The value of the billing status can be assigned automatically when you select the task.

- **Hold** - when marked, this will prevent the slip from appearing on a bill.
- **Recurring** - when marked, this will create a copy of the slip when the slip is billed.

Time Spent / Do Not Bill Time / Rate Settings



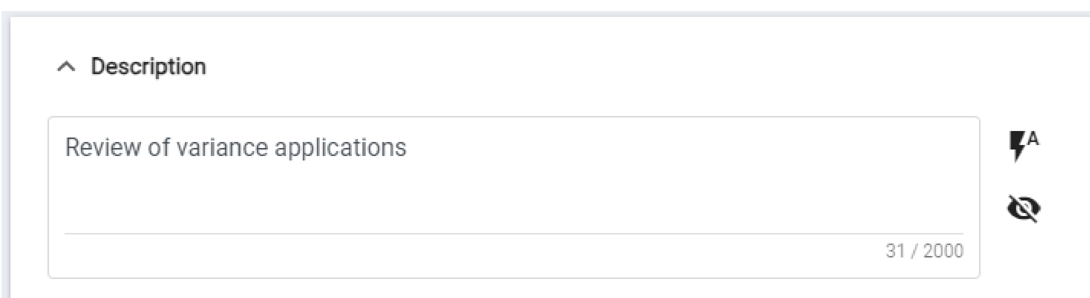
- **Time Spent** - the total time being charged to the client.

  This value can be assigned automatically when you select the task.

- **Do Not Bill Time** - if a portion of the slip should not be billed, you can optionally enter that amount here. When calculating the slip's value, it will subtract this amount from the Time Spent.
- **Rate Source** - determines which rate table (Timekeeper, Client, or Task) is the source of the billing rate. (You populate the rate tables in Timeslips Premium.)
- **Rate Level** - indicates which specific rate level to use from the Rate Source's rate table.
- **Rate Value** - assigns the specific billing rate from the rate table.
- **Rate Type** -
  - **Hourly** - calculates the Slip Value as Time Spent x Rate Value.
  - **Flat** - the Rate Value will be used as the Slip Value, regardless of the Time Spent.

Description

This section allows you to provide free-form text describing the charge that can appear on detailed reports and bills.



This text can be assigned automatically when you select the task.

Using the buttons on the right you can speed text entry using abbreviations (see Using abbreviations in descriptions later in this chapter for more information) and you can hide some of the description on bills and reports (see Using hidden text in descriptions later in this chapter for more information).

Creating expense slips using the Slip Entry screen

Some professionals need to track costs incurred on behalf of their clients. These timekeepers can also use the Slip Entry screen to track these charges for reporting and billing.

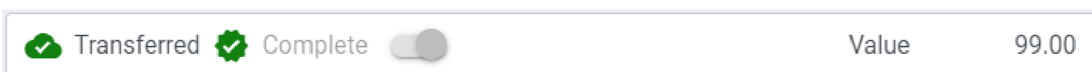
You can use this screen to enter time slips and expense slips. The slip type (time or expense) determines the fields that appear on the slip.

The basic steps to enter an expense slip are:

1. From the main menu, select **Slips** to open the Slips screen, showing the current list of time and expense slips.
2. Click the plus sign (+) above the list of slips and select **New Expense Slip** to create a new expense slip.
3. Enter the details of the slip. This includes the timekeeper, the client, and the expense, along with the quantity and the price.
4. Click the **Save** button at the top of the slips.

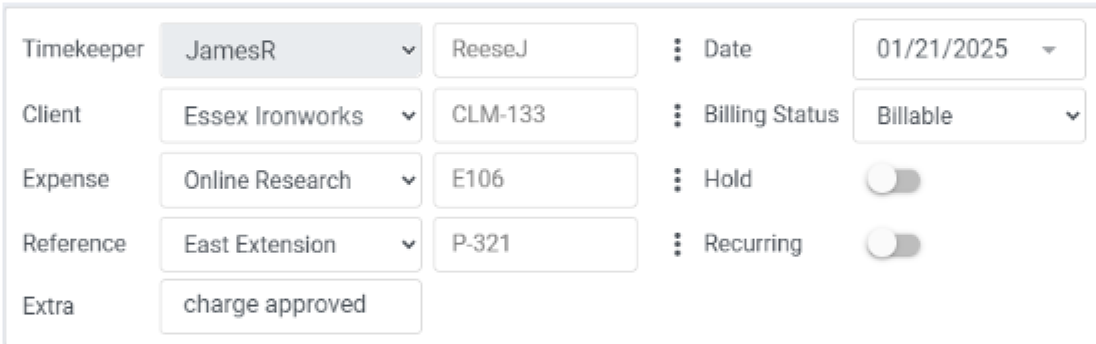
When entering an expense slip, there are several details to view or enter:

Transferred Status / Complete Status / Slip Value



- **Transferred Status** – If a slip has been transferred to Timeslips Premium, a Transferred label will show here. Once a slip is transferred, you can no longer edit it in Timeslips Go.
- **Complete Status** - indicates if the slip is ready to transfer to Timeslips Premium.
- **Slip Value** – the original value of the slip. This is calculated as Quantity x Price.

Names / Extra / Date / Billing Status / Hold / Recurring

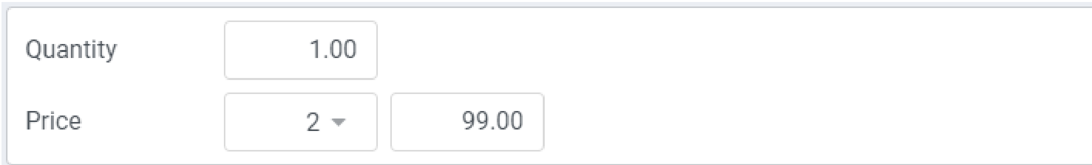


- **Timekeeper** - the person associated with the expense. Timeslips Go assigns this name automatically based on the current login. You cannot change this name unless you're an administrator.
- **Client** - the person or organization who you are charging for this expense. Within this field, you can start typing to jump to a client or you can click the three dots to the right to view favorite clients. You can also click the three dots to the right to choose which nickname to sort by or to show both nicknames together in the list.
- **Expense** - the type of expense or reimbursement you are charging back to the client. You can click the three dots to the right to view favorite expenses.
- **Reference** - an optional subcategory for a client, such as a matter. Each client can have a different list of references associated with it. Within Timeslips Premium, you can make references required on a client-by-client basis.
- **Extra** - optional free-form text associated with the slip that you can use for further classification or an internal note.
- **Date** - when this expense was purchased or took place.
- **Billing Status** - determines how the slip is eventually charged on a bill in Timeslips Premium.
  - **Billable** - this is the typical state of a slip; it will appear on a bill to be charged.
  - **Do Not Bill** - this slip is considered unbillable and will not show on a bill. It will not affect the balance due, but the time spent and value will be tracked so you can review analysis reports that show billable vs. unbillable amounts.
  - **No Charge** - this slip is also considered unbillable, but it will show on a bill so the client is aware of it. It will not affect the balance due, but the value will be tracked so you can review analysis reports that show billable vs. unbillable amounts.
  - **Override** - this slip is considered billable and will appear on a bill. If you set up a billing arrangement for the client in Timeslips Premium, Override slips will not be included in that arrangement's fee.

  The value of the billing status can be assigned automatically when you select the expense.

- **Hold** - when marked, this will prevent the slip from appearing on a bill.
- **Recurring** - when marked, this will create a copy of the slip when the slip is billed.

Quantity / Price

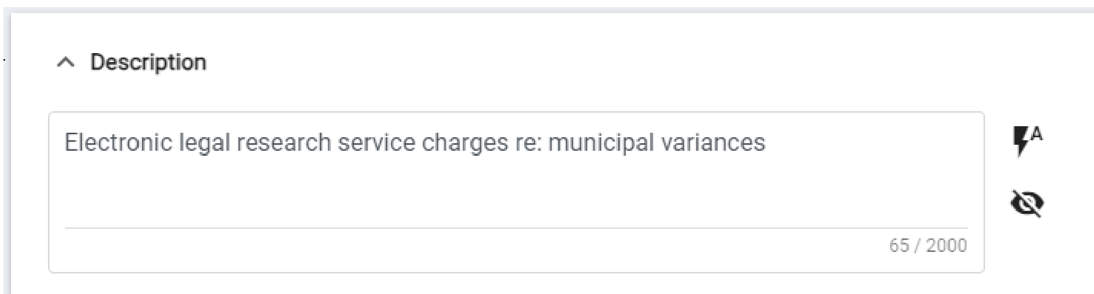


- **Quantity** - The number of items being charged.
- **Price** - The price per item.

These two values can be assigned automatically when you choose the expense.

Description

This section allows you to provide free-form text describing the expense that can appear on detailed reports and bills.



This text can be assigned automatically when you select the expense.

Using the buttons on the right you can speed text entry using abbreviations (see Using abbreviations in descriptions later in this chapter for more information) and you can hide some of the description on bills and reports (see Using hidden text in descriptions later in this chapter for more information).

Editing time and expense slips using the Slips screen

You can review and edit time and expense slips from many screens in Timeslips Go, but the Slips screen makes this process quick and easy.

Please note that you cannot edit slips that have been transferred to Timeslips Premium. See "TRANSFERRING DATA" later in this guide for more information.

Please note that some security settings can prevent you from editing slips. See "Setting Up Timekeeper Security" earlier in this guide for more information.

To review and edit time slips or expense slips from the Slips screen:

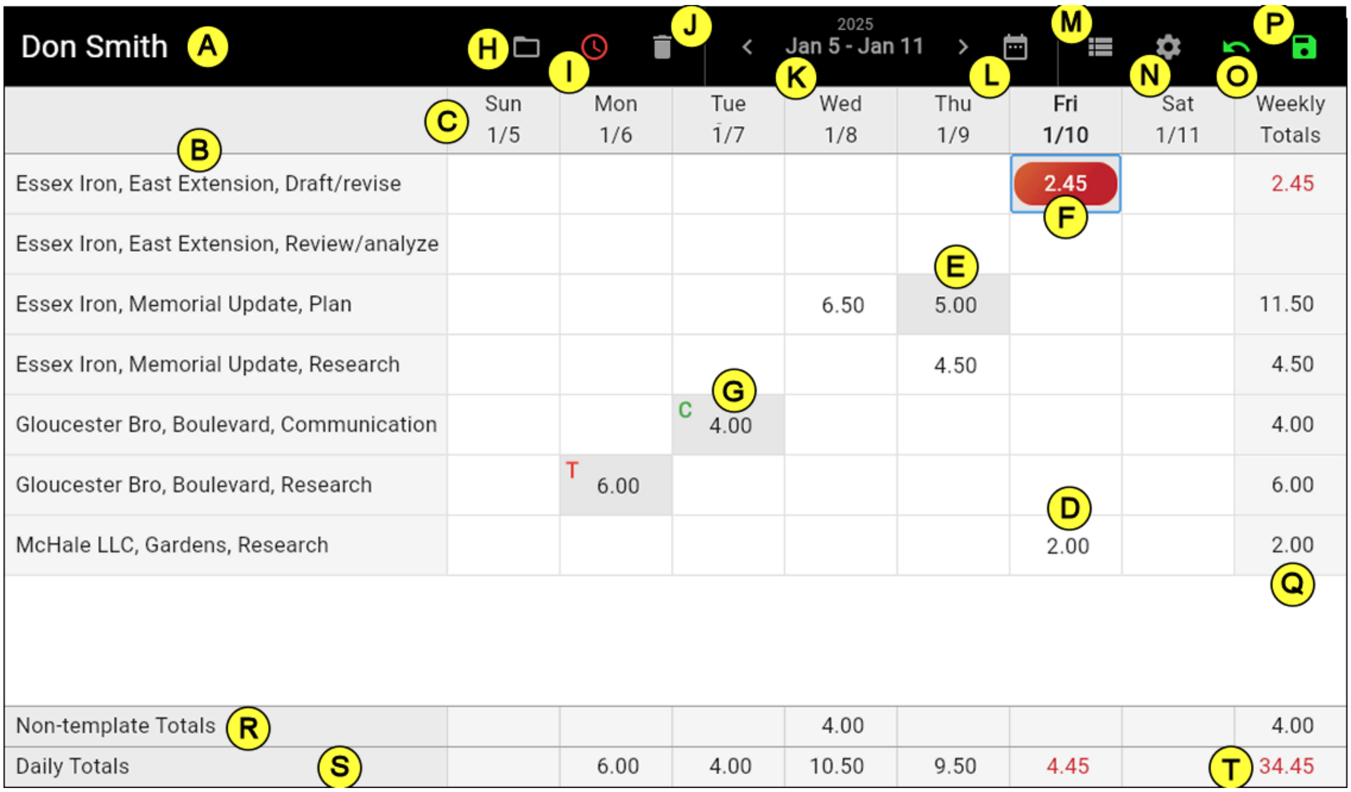
1. From the main menu, select Slips to open the Slips screen.
2. Optionally use the Filters at the top of the screen to limit the slips displayed, so you can find the slip to edit easier.
3. Optionally click on column headings to sort the slips, so you can find the slip to edit easier.
4. Click on a slip to open the popup menu.
5. From the popup menu, click the Edit Record button to open the Slip Entry screen.
6. Change any slip details as needed and click the Save button.

Creating time slips using the Timesheet screen

As an alternative to the detailed method of time entry that the Slip Entry screen provides, timekeepers can quickly enter time using the Timesheet screen. From the main menu, select **Timesheet** to open the Timesheet screen.

The Timesheet screen enables timekeepers to track their time for a given week using a familiar spreadsheet format. You can use the Timesheet screen to review slip totals or you can enter time directly in a cell to create new slips.

The following image provides an overview of the Timesheet screen:



A - The current timekeeper is listed at the top of the timesheet. You cannot view timesheets of other timekeepers.

B - The list of timesheet slip templates is shown down the left side of the timesheet. They represent a combination of client, task, and optionally reference. You must create these templates to be able to enter time through the timesheet. Click the Edit Templates button (**M**) to maintain these templates.

C - The days of the current week are shown along the top of the timesheet. Use the date chooser (**K**) to change the week displayed.

D - Use cells to enter time quickly using the names in a template for a specific day.

E - Cells that are shaded may represent multiple slips for the same names on the same dates. You'll need to open these in the Slip Entry screen to be able to change these.

F - You can track time using the stopwatch timer (**I**). Each timekeeper cannot have more than one timer running. A cell with a running timer shows with a red background.

G - Entries that are completed or transferred will show with an indicator in the left corner. C indicates Completed; T indicates Transferred. You cannot edit these slips in the timesheet, so they are shaded.

H -Select an entry and click Open from the toolbar to open the entry in the Slip Entry screen.

I - Select an entry and click Start Timer from the toolbar to track time interactively. A cell with a running timer will display red (**F**).

J - Select an entry and click Delete from the toolbar to delete the entry. This will delete the associated slip when you save the timesheet

K - Use the date controls to quickly change which week you are viewing.

L - When viewing another week, you can click Current Week from the toolbar to get back to the current week quickly.

M - Click the Edit Templates button to maintain timesheet slip templates. You can also double click on a template from the list (**B**) to edit it.

N - Click the Timesheet Settings button to access Timesheet Settings where you can change how the timesheet and its entries display, such as time format, first day of the week, template order, etc.

O - Click the Revert button to revert any changes made since the last save.

P - Click the Save button to save all changes you've made to entries in the timesheet.

Q - Weekly Totals for each timesheet show down the right side of the timesheet.

R - Within the Timesheet Settings screen (N) you can also show Non-template Totals at the bottom of the timesheet. These are entries for the displayed week that are not associated with the templates you're displaying.

S - Daily Totals show at the bottom of the timesheet. For an accurate representation of your day, you should also include Non-template Totals (**R**).

T - The bottom right shows your total hours for the week

Creating timesheet templates

Before you can view or enter time in the timesheet, you must create timesheet slip templates. These templates provide information needed to convert the entries from the timesheet into time slips.

From the top of the Timesheet screen, click the Edit Templates button to open the Timesheet Slip Templates screen. Next, click the plus sign at the top of the screen to create a new template.

Understanding rows and columns

The rows of the dialog box represent timesheet slip templates.

The columns of the dialog box represent days of the week. The days of the week determine the date that Timeslips Go uses on the time slips.

The intersection of a row and column forms a cell. The values contained in each cell represent the total time spent on that day for slips associated with the current time sheet slip template. These totals can represent more than one slip for the cell.

Determining preferences

You can customize the Timesheet screen to match how you enter time.

From the top of the Timesheet screen, click the Timesheet Settings button to open the Timesheet Settings screen. Here you can control settings such as determining the first day of the week displayed in the timesheet or determining the duration format of entries on the timesheet.

Entering time in the Time Sheet Slip Entry dialog box

After you create timesheet slip templates and set preferences, you can use the Timesheet screen to enter time.

The simplest way to enter time is to click on a cell and enter the time spent directly within this cell. You can enter the time spent in either HH.DD format or HH:MM:SS format.

You can also click on a cell and click the Timer button above the timesheet to accrue time as you work. When a timer is active, the timesheet highlights the text in the cell in red. A timekeeper can only have one active timer at a time.

Viewing non-template totals

Totals for each day appear at the bottom of the timesheet. However, you can also display daily totals from slips that do not match existing slip templates.

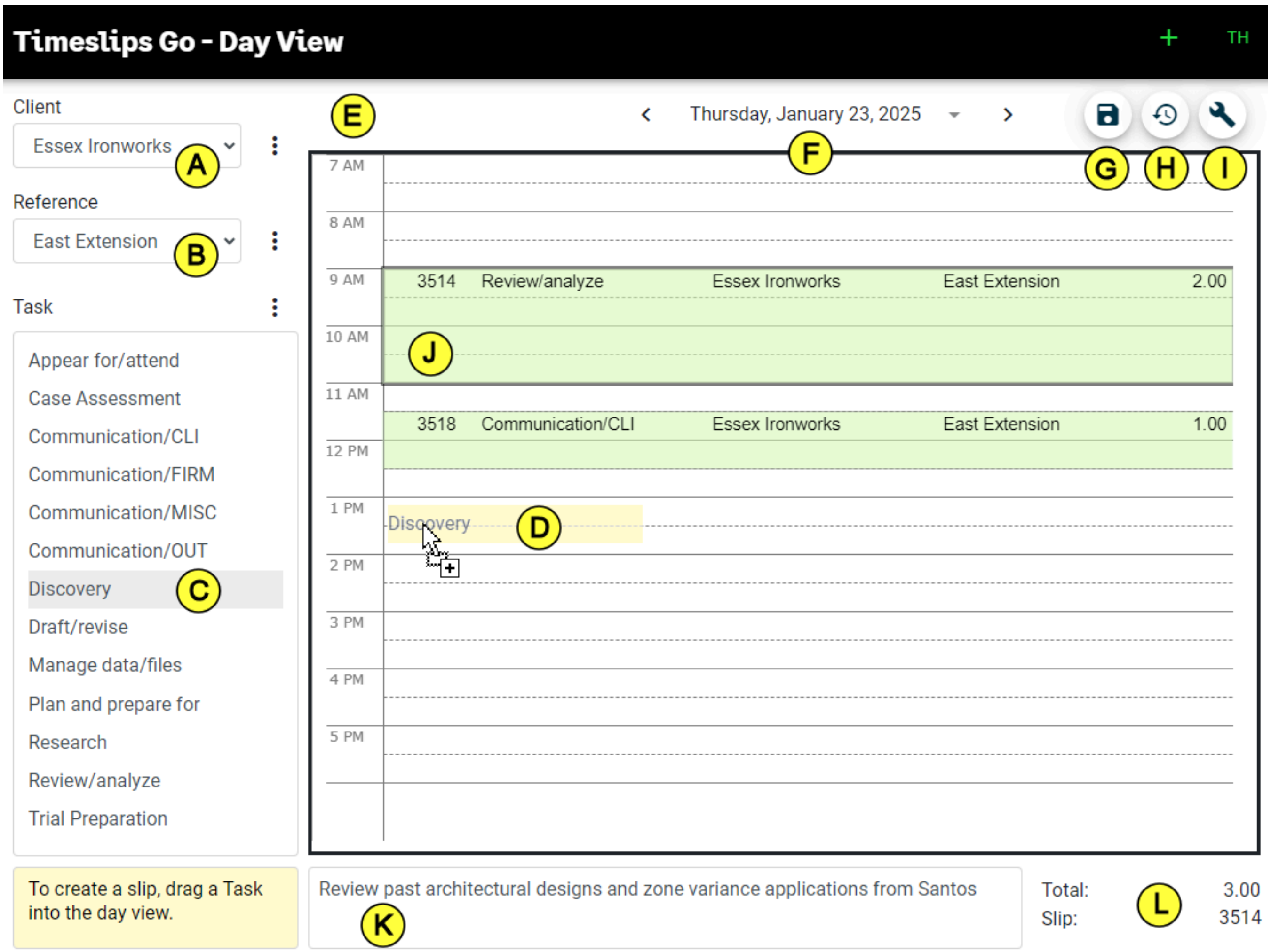
In the Timesheet Settings screen, mark "Show non-template totals" to include the Non-template Totals row at the bottom of the timesheet. When displaying non-template totals, those values are also included as part of the Daily Totals at the bottom of the timesheet.

Creating time slips using the Day View screen

The Day View screen provides a daily view of your time. It is intended for those timekeepers who include a start time with each entry, so they can make the most of each day.

From the main menu, select **Day View** to open the Day View screen for the current timekeeper.

The following image provides an overview of the Day View screen:



The Day View will show only those entries assigned to the current timekeeper. New entries that you create here will automatically be assigned to this timekeeper.

A - Before creating a new time entry, you must select which client to assign to the entry. You can click the button to the right of this field to switch between nickname 1 and nickname 2.

B - Before creating a new time entry, you can optionally select which reference to assign to the entry. You can click the button to the right of this field to switch between nickname 1 and nickname 2.

C - To create a new time entry, click on a task from the list and drag the entry to the Day View. You can click the button to the right of this field to switch between nickname 1 and nickname 2.

D - Drag the new entry onto the Day View. Timeslips Go will use the current timekeeper, the client **(A)**, the optional reference **(B)**, and the task **(C)** to create the new time entry.

E - The start times are listed down the left side of the Day View. You can change the times that your work day begins and ends in the Preferences screen **(J)**.

F - Click the **<** button to move to the previous day. Click the **>** button to move to the next day. Click on the date to open a calendar to select a specific date.

G - Click the Save button to create time slips from new entries or to save changes to existing slips.

H - Click the Revert button to undo changes since your last save.

I - Click the Preferences button to access preferences that can customize the Day View.

J - Each entry on the Day View shows the associated slip number, the task, the client, the optional reference, and the time spent.

K - When you click on an entry, you can view the associated slip description below the Day View.

L - The total of the day's slips is shown below the Day View.

Determining preferences

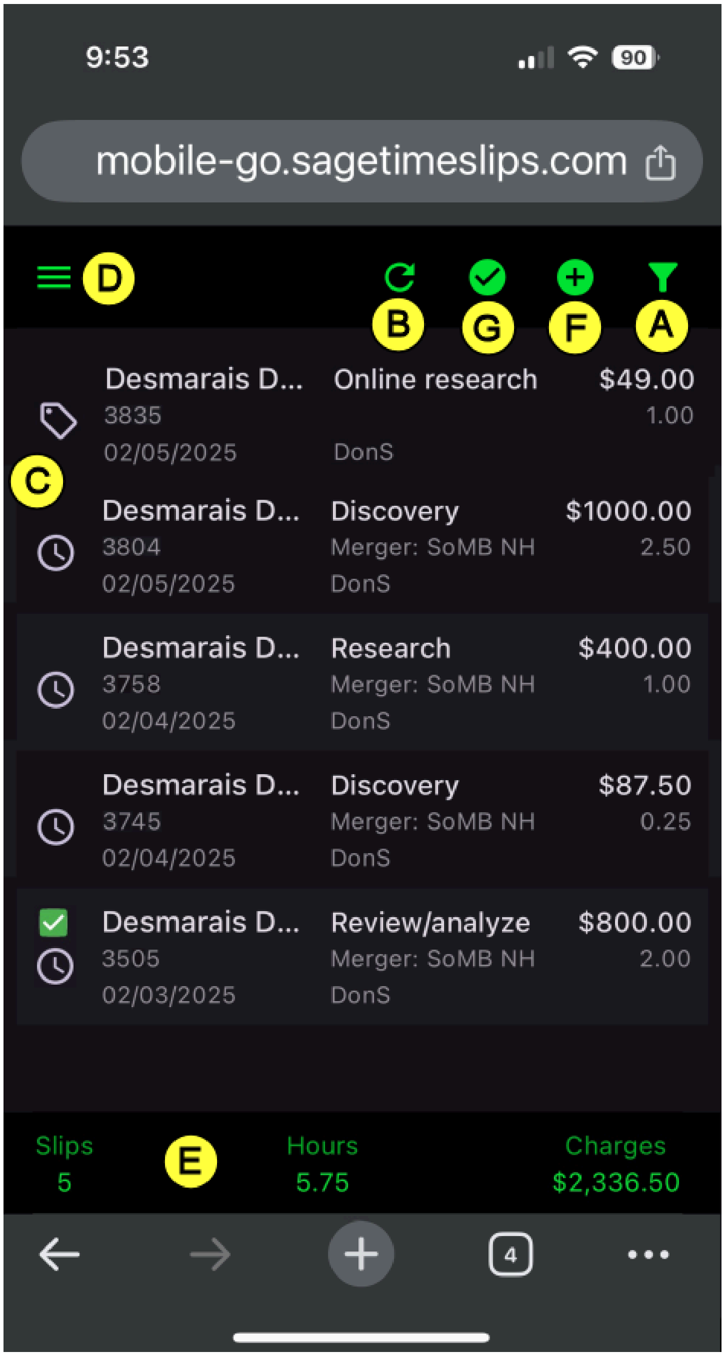
You can customize the Day View screen to match how you enter time.

From the top of the Day View screen, click the Preferences button to open the Preferences screen. Here you can control settings such as determining the start time and end time of the work day, determining the duration format of entries, and colors used.

Viewing slips on the Slips screen (Mobile site)

For employees who are out of the office when they want to track time, Timeslips Go also offers a mobile site: https://mobile-go.sagetimeslips.com. This site is not full-featured like the main Timeslips Go site. Instead you can use it to quickly view and track your slips. When you open the mobile site, you are presented with your slip list.

The following image provides an overview of the Slips screen:



A - By default, the Slips screen will show all of your slips in descending order by Slip ID. If you are an administrator, it will show slips of other timekeepers in your firm.

If you want to limit what is displayed or change the order of slips, you can tap the **Filter** button on the right side above the list. For example, you can filter the list to show slips for specific clients and specific dates. You can also change the sort to something else, like Date order.

B - To ensure the slip list is showing the most up-to-date information, you can tap **Refresh** at the top of the screen.

C - The slip list shows information for each time and expense slip. You can see information like the client and activity associated with each charge, if the slip is complete and ready for transfer, or if the slip has already been transferred. Tap any slip to see more details for it.

D - To customize the appearance of the Timeslips Go, you can tap **Settings** at the top left of the screen. You can change things like the color theme, the font size, and the format or location of some fields.

E - The totals at the bottom of the list summarize the slips included on the slip list.

F - To add a new slip, tap **New Slip** above the list.

G - You can mark all displayed slips as Completed quickly by tapping **Mark Slips Complete** above the list.

Creating time slips using the Slip Entry screen (Mobile site)

The mobile site offers a simple detailed screen to enter time slips. The full site offers other ways to enter slips using a grid format. See "ENTERING TIME AND EXPENSES" for more information on the different ways to enter slips.

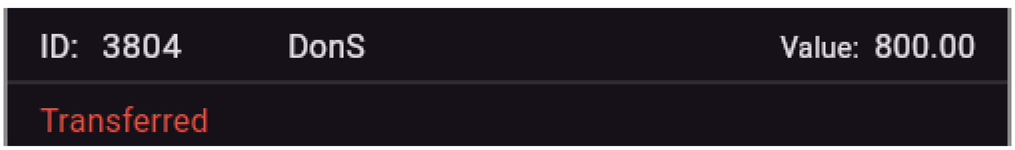
You can use this screen to enter time slips and expense slips. The slip type (time or expense) determines the fields that appear on the slip.

The basic steps to enter a time slip are:

1. Open the mobile site to view the current list of time and expense slips.
2. Tap the plus sign (+) above the list of slips and select **Time Slip** to create a new time slip.
3. Enter the details of the slip. This includes the client, the task, the time spent, and the billing rate.
4. Tap the **Save** button at the top of the slip.

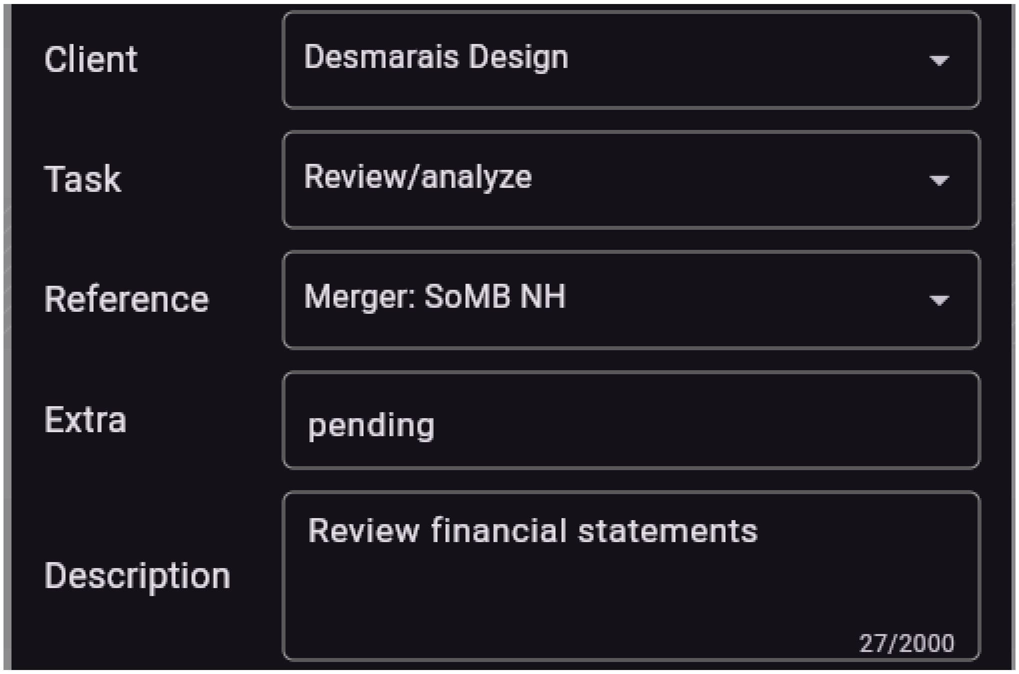
When entering a time slip, there are several details to view or enter:

Slip ID / Timekeeper / Slip Value / Transferred Status



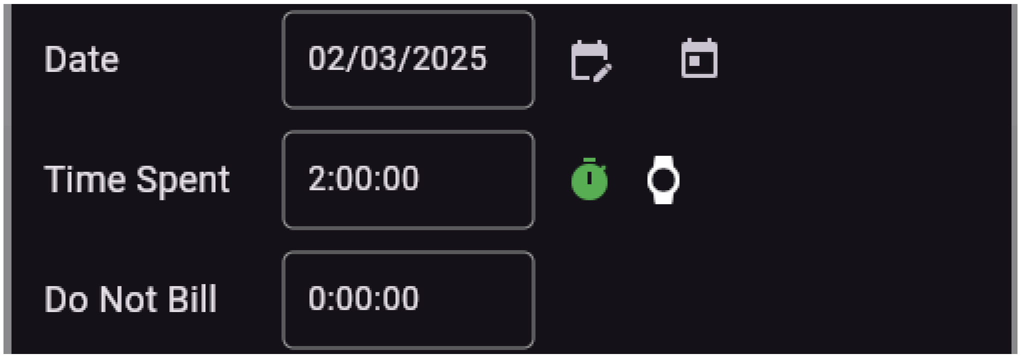
- **Slip ID** – When you save a new slip, Timeslips Go will assign a slip ID to it. This number is to help you identify the slip on reports, etc. Please note, when you transfer the slip to Timeslips Premium, it will not retail this Slip ID; Timeslips Premium uses its own number system.
- **Timekeeper** – Shows the person whose time you are billing. Timeslips Go assigns this name automatically based on the current login. You cannot change this name. This is most useful to administrators who review other timekeepers' slips.
- **Slip Value** - This is the original value of the slip. When using an Hourly rate (see below), the Slip Value is calculated as Time Spent x Rate Value. When using a Flat rate, the Slip Value matches the Rate Value.
- **Transferred Status** – If a slip has been transferred to Timeslips Premium, a Transferred label will show here; if a slip has not yet been transferred, no label will show. Once a slip is transferred, you can no longer edit it in Timeslips Go.

Other Names / Extra / Description



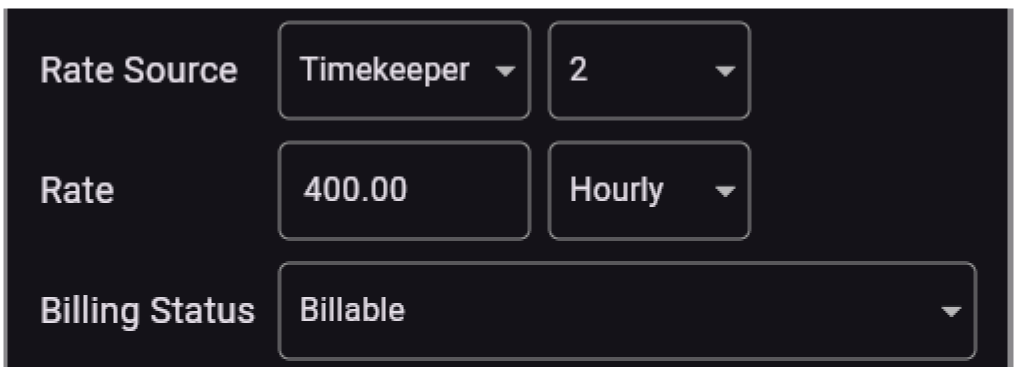
- **Client** - the person or organization who you are charging for this entry.
- **Task** - the type of work you are doing for the client.
- **Reference** - an optional subcategory for a client, such as a matter. Each client can have a different list of references associated with it. Within Timeslips Premium, you can make references required on a client-by-client basis.
- **Extra** - optional free-form text associated with the slip that you can use for further classification or an internal note.
- **Description** – this field allows you to provide free-form text describing the charge. It can appear on detailed reports and bills. This text can be assigned automatically when you select the task.

Date / Time Spent / Do Not Bill



- **Date** - when this work took place.
- **Time Spent** - the total time being charged to the client. This value can be assigned automatically when you select the task.
- **Do Not Bill Time** - if a portion of the slip should not be billed, you can optionally enter that amount here. When calculating the slip's value, it will subtract this amount from the Time Spent.

Rate Details / Billing Status

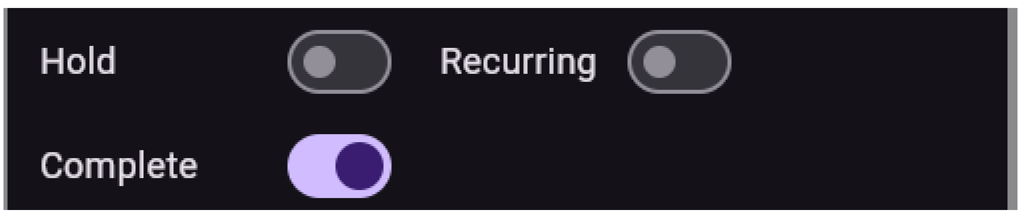


- **Rate Source** - determines which rate table (Timekeeper, Client, or Task) is the source of the billing rate. (You populate the rate tables in Timeslips Premium.)
- **Rate Level** - this field to the right of the rate source indicates which specific rate level to use from the Rate Source's rate table.
- **Rate Value** - assigns the specific billing rate from the rate table or you can manually enter the billing rate here.
- **Rate Type** -
  - **Hourly** - calculates the Slip Value as Time Spent x Rate Value.
  - **Flat** - the Rate Value will be used as the Slip Value, regardless of the Time Spent.

- **Billing Status** - determines how the slip is eventually charged on a bill in Timeslips Premium.
    - **Billable** - this is the typical state of a slip; it will appear on a bill to be charged.
    - **Do Not Bill** - this slip is considered unbillable and will not show on a bill. It will not affect the balance due, but the time spent and value will be tracked so you can review analysis reports that show billable vs. unbillable amounts.
    - **No Charge** - this slip is also considered unbillable, but it will show on a bill so the client is aware of it. It will not affect the balance due, but the time spent and value will be tracked so you can review analysis reports that show billable vs. unbillable amounts.
    - **Override** - this slip is considered billable and will appear on a bill. If you set up a billing arrangement for the client in Timeslips Premium, Override slips will not be included in that arrangement's fee.

  The value of the billing status can be assigned automatically when you select the task.

Hold / Recurring / Complete



- **Hold** - when marked, this will prevent the slip from appearing on a bill in Timeslips Premium.
- **Recurring** - when marked, this will create a copy of the slip when the slip is billed.
- **Complete** - indicates if the slip is ready to transfer to Timeslips Premium.

Creating expense slips using the Slip Entry screen (mobile site)

Some professionals need to track costs incurred on behalf of their clients. These timekeepers can also use the Slip Entry screen to track these charges for reporting and billing.

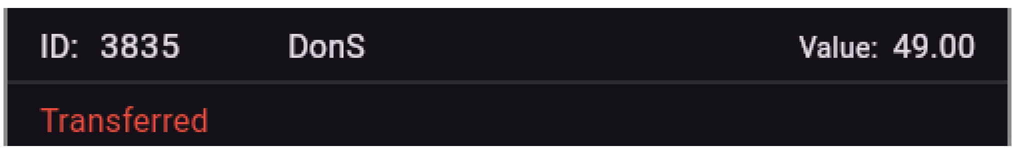
You can use this screen to enter time slips and expense slips. The slip type (time or expense) determines the fields that appear on the slip.

The basic steps to enter an expense slip are:

1. Open the mobile site to view the current list of time and expense slips.
2. Tap the plus sign (+) above the list of slips and select **Expense Slip** to create a new expense slip.
3. Enter the details of the slip. This includes the timekeeper, the client, and the expense, along with the quantity and the price.
4. Tap the **Save** button at the top of the slips.

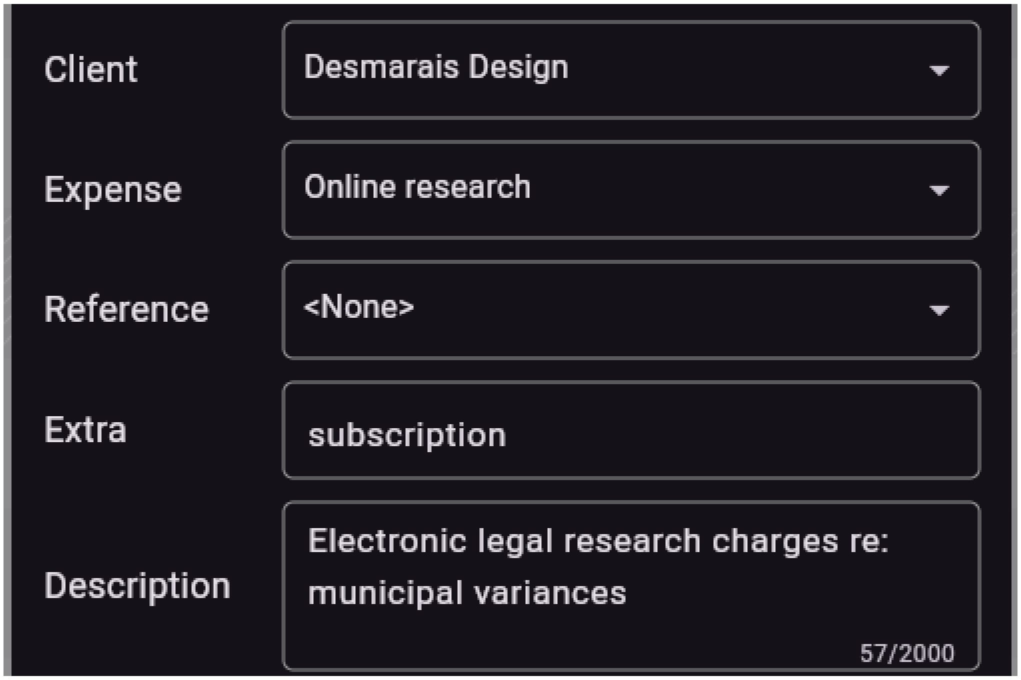
When entering an expense slip, there are several details to view or enter:

Slip ID / Timekeeper / Slip Value / Transferred Status



- **Slip ID** – When you save a new slip, Timeslips Go will assign a slip ID to it. This number is to help you identify the slip on reports, etc. Please note, when you transfer the slip to Timeslips Premium, it will not retail this Slip ID; Timeslips Premium uses its own number system.
- **Timekeeper** – Shows the person associated with the expense. Timeslips Go assigns this name automatically based on the current login. You cannot change this name. This is most useful to administrators who review other timekeepers' slips.
- **Slip Value** - This is the original value of the slip. This is calculated as Quantity x Price.
- **Transferred Status** – If a slip has been transferred to Timeslips Premium, a Transferred label will show here; if a slip has not yet been transferred, no label will show. Once a slip is transferred, you can no longer edit it in Timeslips Go.

Other Names / Extra / Description



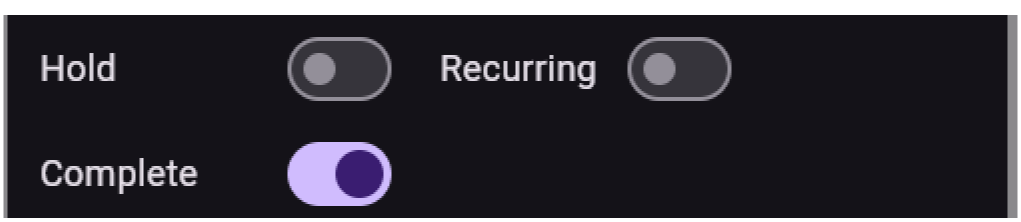
- **Client** - the person or organization who you are charging for this entry.
- **Expense** - the type of expense or reimbursement you are charging back to the client.
- **Reference** - an optional subcategory for a client, such as a matter. Each client can have a different list of references associated with it. Within Timeslips Premium, you can make references required on a client-by-client basis.
- **Extra** - optional free-form text associated with the slip that you can use for further classification or an internal note.
- **Description** – this field allows you to provide free-form text describing the charge. It can appear on detailed reports and bills. This text can be assigned automatically when you select the expense.

Date / Quantity / Price / Billing Status

- **Date** - when this expense was purchased or took place.
- **Quantity** - The number of items being charged. This value can be assigned automatically when you choose the expense.
- **Price** - The price per item. This value can be assigned automatically when you choose the expense. You can choose another price from the list or manually enter a price.
- **Billing Status** - determines how the slip is eventually charged on a bill in Timeslips Premium.
  - **Billable** - this is the typical state of a slip; it will appear on a bill to be charged.
  - **Do Not Bill** - this slip is considered unbillable and will not show on a bill. It will not affect the balance due, but the time spent and value will be tracked so you can review analysis reports that show billable vs. unbillable amounts.
  - **No Charge** - this slip is also considered unbillable, but it will show on a bill so the client is aware of it. It will not affect the balance due, but the value will be tracked so you can review analysis reports that show billable vs. unbillable amounts.
  - **Override** - this slip is considered billable and will appear on a bill. If you set up a billing arrangement for the client in Timeslips Premium, Override slips will not be included in that arrangement's fee.

  The value of the billing status can be assigned automatically when you select the expense.

Hold / Recurring / Complete



- **Hold** - when marked, this will prevent the slip from appearing on a bill in Timeslips Premium.
- **Recurring** - when marked, this will create a copy of the slip when the slip is billed.
- **Complete** - indicates if the slip is ready to transfer to Timeslips Premium.

Other considerations when creating slips

Using slip-making defaults

When creating time slips and expense slips, Timeslips Go can automatically assign slip-making defaults for specific fields after you assign the task name or expense name. All screens where you can create slips – Slip Entry screen, Timesheet screen, Day View screen – can make use of these defaults.

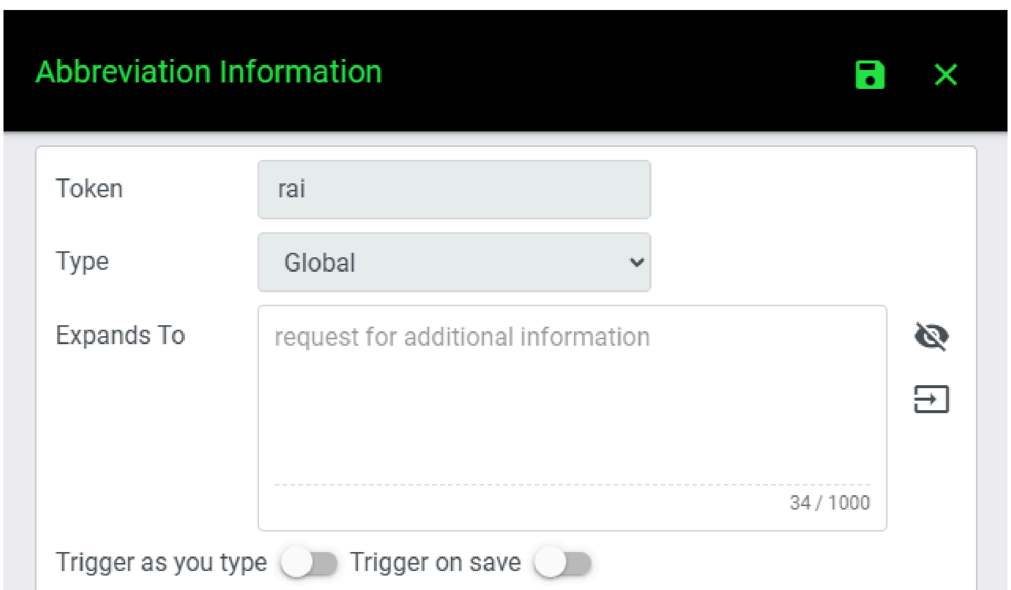
For time slips, the task name can assign defaults for Time spent, Bill status, Hold, and Description. You enter these default values for each task name in the Task Information dialog box in Timeslips Premium.

For expense slips, the expense name can assign defaults for Price, Quantity, Bill Status, Hold, and Description. You enter these default values for each expense name in the Expense Information dialog box in Timeslips Premium.

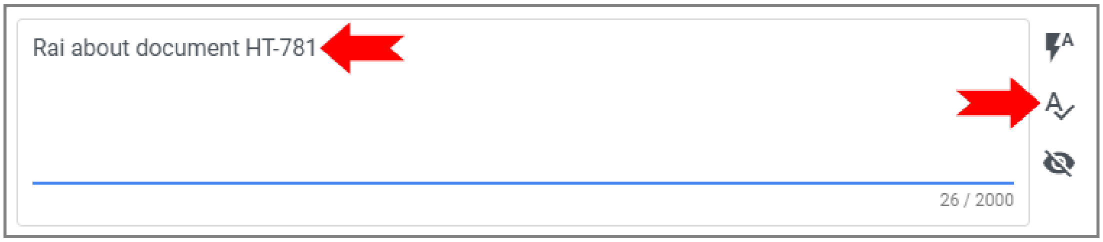
Using abbreviations in descriptions

When entering slip descriptions, you can use abbreviations to speed up frequently entered phrases. (See "Setting up Abbreviations and Abbreviation Cue" for information about creating abbreviations.)

For example, if you frequently use the phrase "request for additional information" then you could create a token for "rai" that expands to "request for additional information".



When entering a description as part of a slip, if you use an abbreviation token, you can click the **Expand Abbreviations** button to the right of the Description field and Timeslips Go will expand the text for you.



If the abbreviation is set to "Trigger as you type", entering a space or punctuation after the token will automatically expand the abbreviation for you.

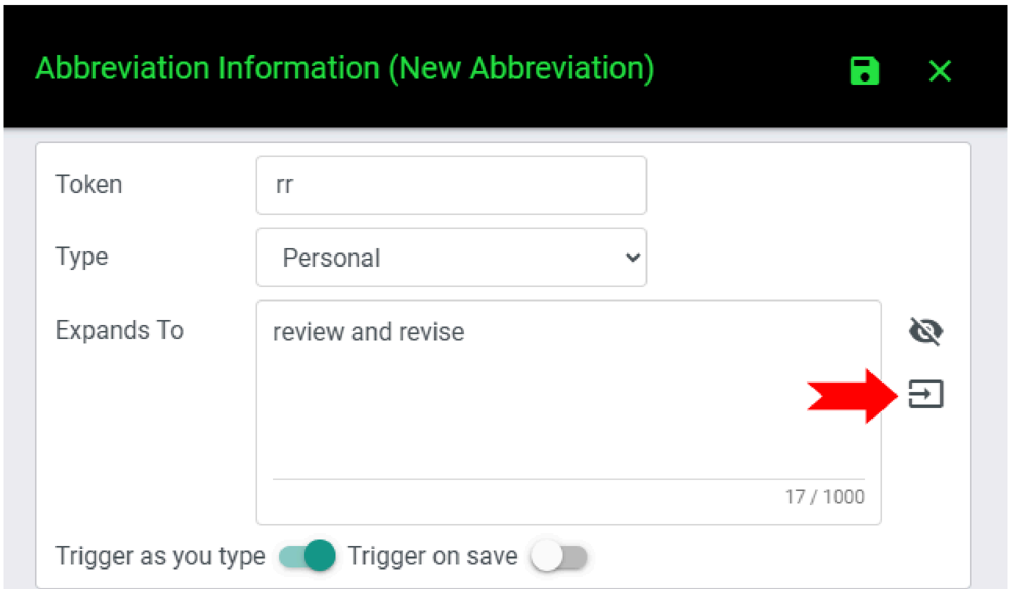
Note: Abbreviations are not supported on the mobile site or mobile apps.

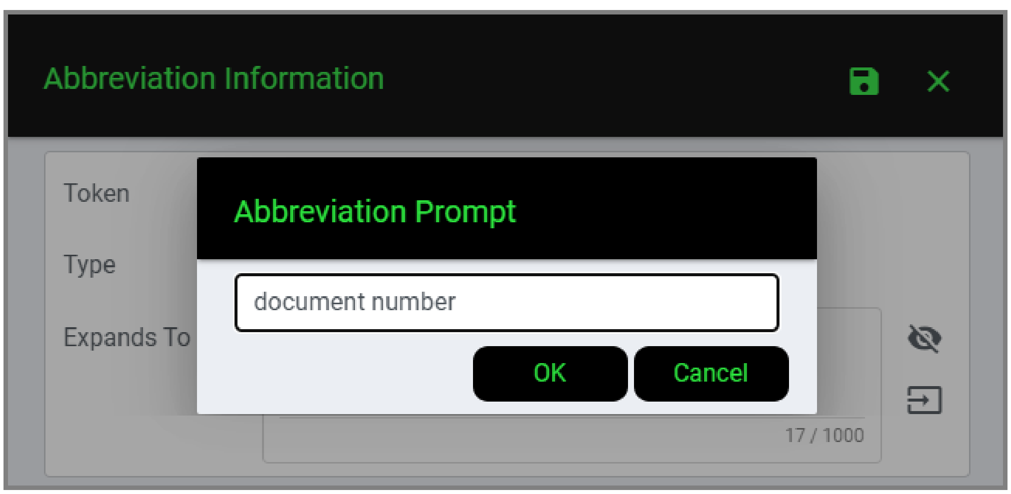
Using abbreviation prompts

If there are other details you typically enter after you use an abbreviation, you can add that as an abbreviation prompt.

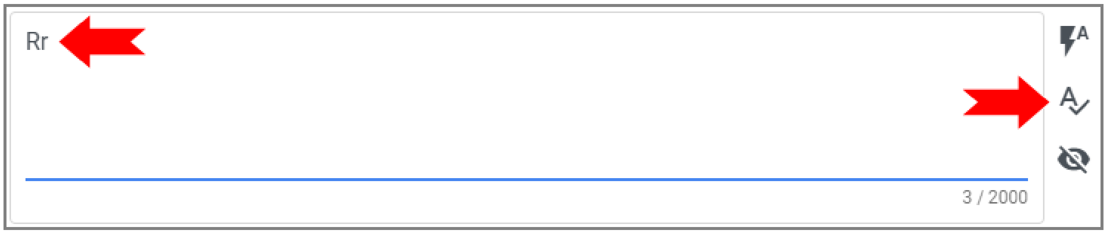
For example, if you frequently use the phrase "review and revise" and then add a document number, you could prompt for the document number as part of the abbreviation "Expands To" text.

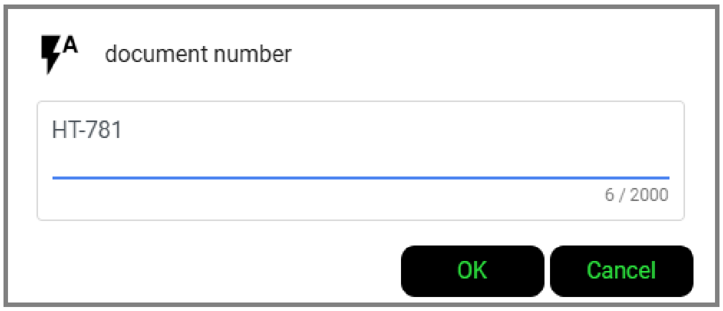
When creating the abbreviation (select **Settings** > **Abbreviations**), click the **Insert Prompt** button and add the prompt for a document number.

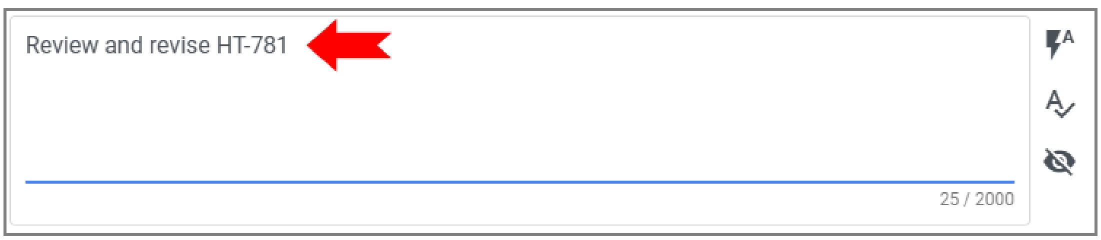




When you use this abbreviation in a description, clicking the **Expand Abbreviations** button or pressing the spacebar will prompt you for more information.

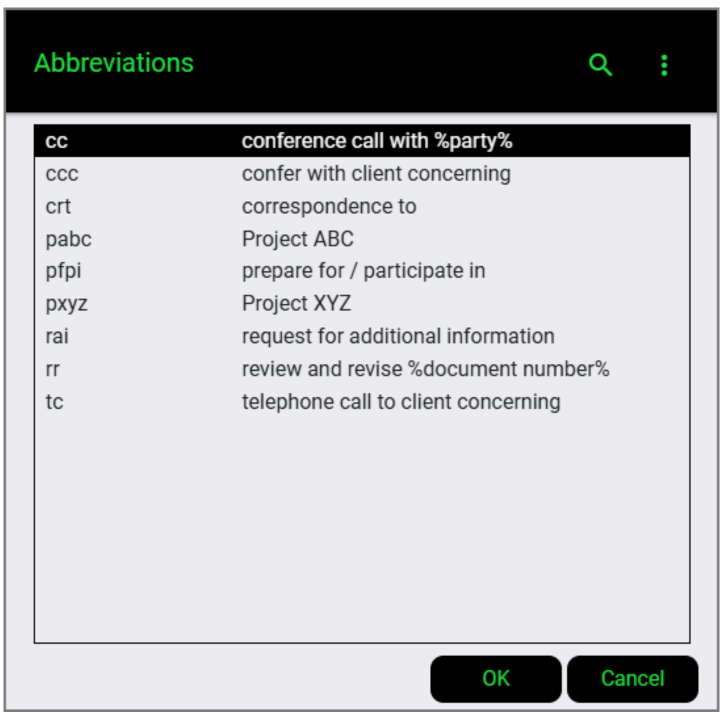






Viewing available abbreviations

When entering descriptions on the Slip Entry screen, you can view all global and personal abbreviations available to you. Click the **Select Abbreviations** button to the right to show available abbreviations.



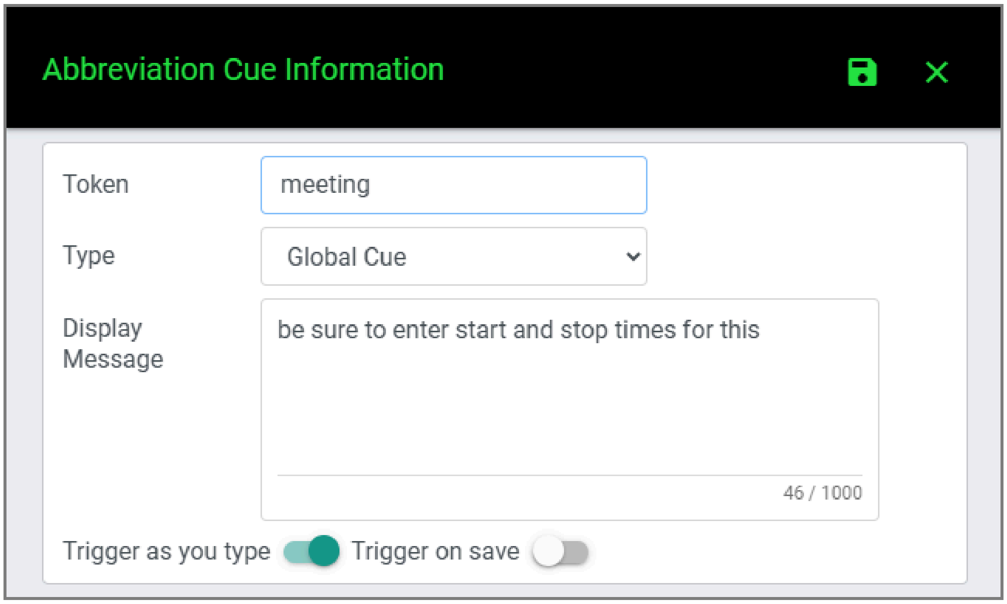
You can use the buttons on the top right corner to search for abbreviations or to filter abbreviations.

Click on an abbreviation from the list and then click **OK** to apply it to your description.

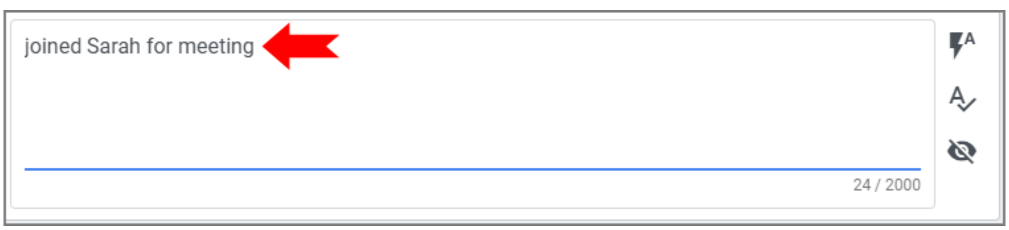
Using abbreviations cues in descriptions

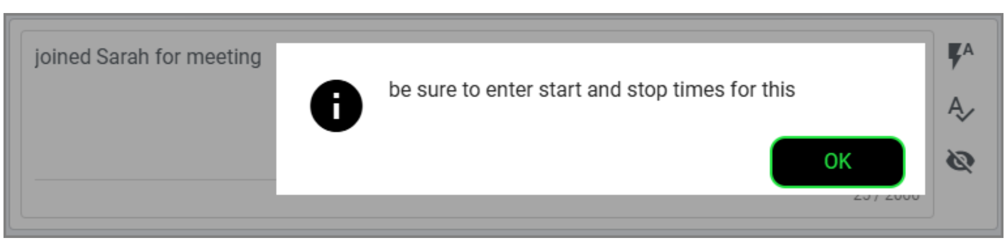
When entering slip descriptions, you can use abbreviation cues to display messages to timekeepers, such as reminding them of your firm's policies. (See "Setting up Abbreviations and Abbreviation Cues" for information about creating abbreviations.)

For example, your firm may require that you enter start and stop times of meetings within the description; you can enter an abbreviation cue to display this policy.



When entering a description as part of a slip, if you use this abbreviation cue token (which is set to trigger as you type) Timeslips Go will display the associated message.





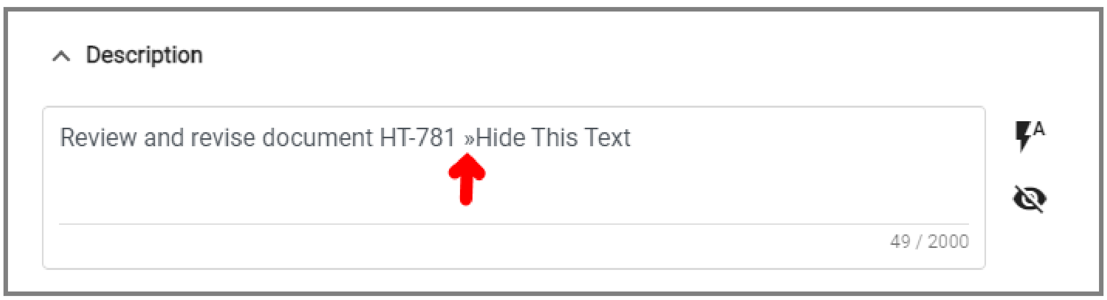
Note: Abbreviations cues are not supported on the mobile site or mobile apps.

Using hidden text in descriptions

When entering slip descriptions, you can mark some text as hidden text. You can still see hidden text on screens, but you can automatically prevent this text from appearing on bills and reports.

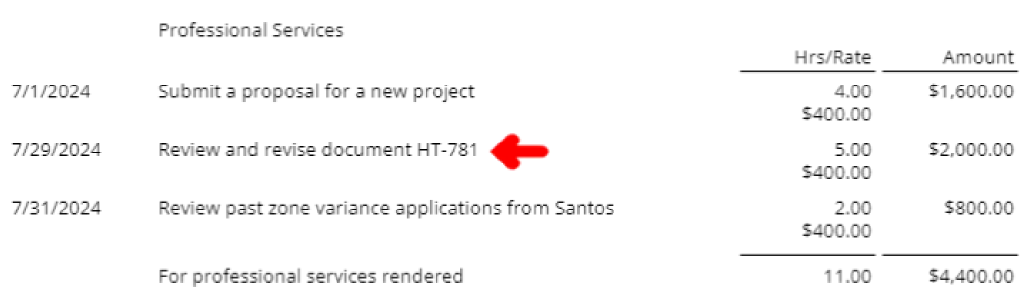
Place the cursor before any text you want to hide and click the **Insert Private Text Indicator** button.

The private text indicator will be inserted at the current position.



Note: Private text is not supported on the mobile site.

When printing a bill in Timeslips Premium, the private text will not be shown with the slip's description.



	Professional Services	Hrs/Rate	Amount
7/1/2024	Submit a proposal for a new project	4.00 $400.00	$1,600.00
7/29/2024	Review and revise document HT-781	5.00 $400.00	$2,000.00
7/31/2024	Review past zone variance applications from Santos	2.00 $400.00	$800.00
	For professional services rendered	11.00	$4,400.00

Slip security

Using the security system, you can restrict viewing and editing slip details. The available access rights include preventing timekeepers from entering expense slips, preventing timekeepers from editing slips, and preventing timekeepers from viewing rates and values on slips.

See "Setting Up Timekeeper Security" earlier in this guide for more information.

Working with Clients and References

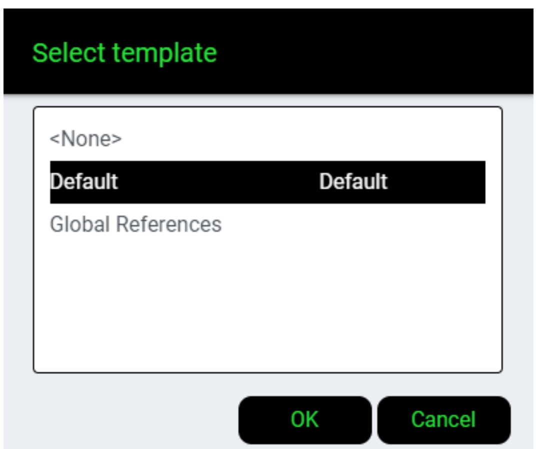
When entering slips, you will primarily work with names that you have set up in Timeslips Premium and have transferred to Timeslips Go. However, some firms work with walk-in clients, so they may need to create a client in Timeslips Go quickly so they can create slips for that new client.

Creating clients

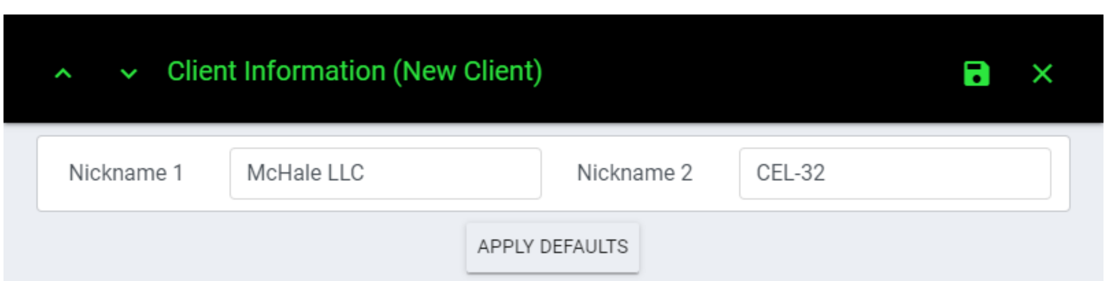
To create a new client:

1. From the main menu to the left, click **Clients** to open the Client List page.
2. Review the list to ensure the client you're creating does not yet exist.
3. Click the plus sign (+) above the list of clients and choose **New Client**.

Timeslips Go will prompt you to select a client template from Timeslips Premium to use for default values for the new client. Select a template or select <None> if you don't want to use default values, and then click **OK**.



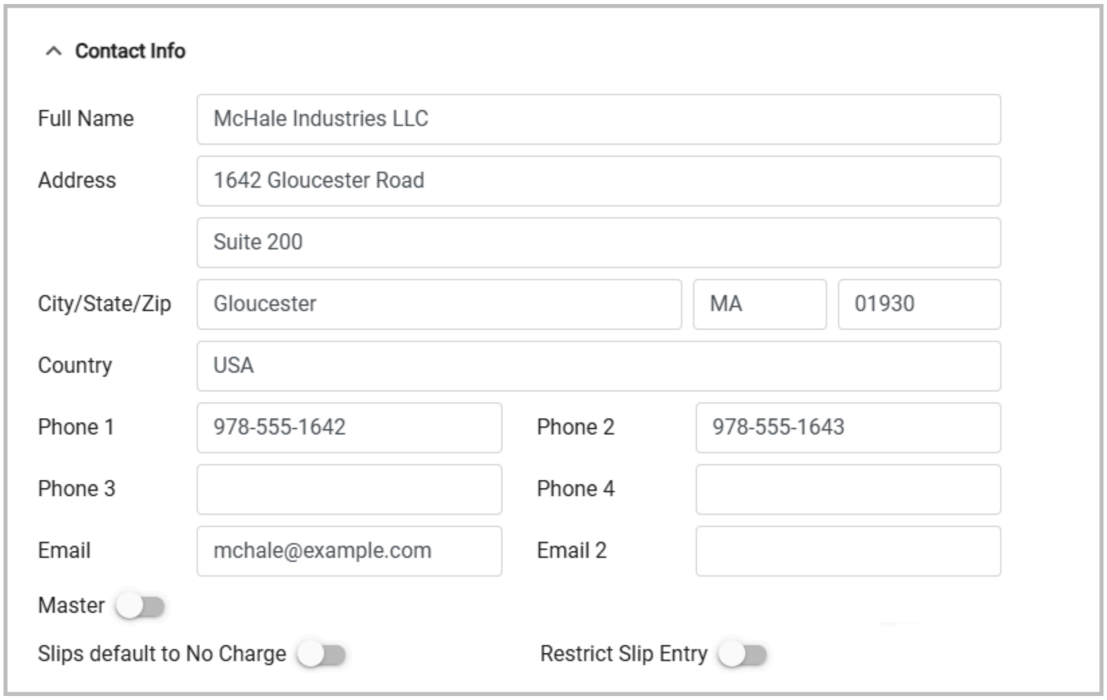
Add nicknames that will identify the new client throughout Timeslips Anywhere and click the **Apply Defaults** button. The default values from the selected client template will be applied to the new client.



Click the **Save** button at the top right corner of the Client Information screen and then continue to enter client details as needed.

Contact Info

The fields in this section identify the client, indicate how to contact the client, and determine where to send the client's bills.



The "Master" setting and "Include project in consolidated bill" setting determine if the client will be part of consolidated billing.

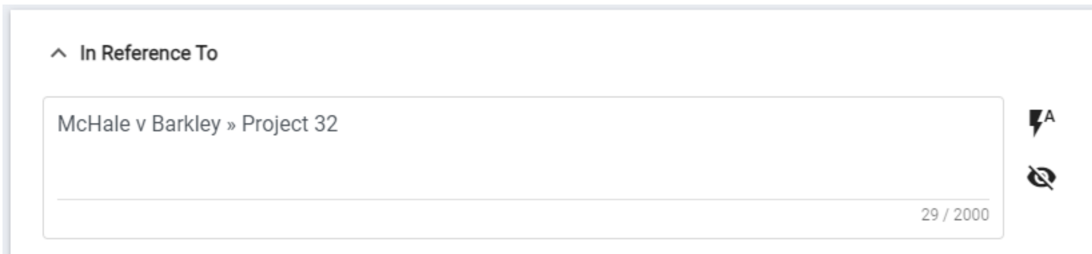
"Slips default to No Charge" allows you to override the Billing Status for new slips created for this client. This is useful when you have taken on pro bono work or if you use a client to track internal overhead.

"Restrict Slip Entry" allows you to warn timekeepers about entering new charges for a client that may be behind in paying off their balance.

In Reference To

Use this section to describe the current billing engagement with the client. This text will appear on the client’s bill in Timeslips Premium and can also appear on reports.

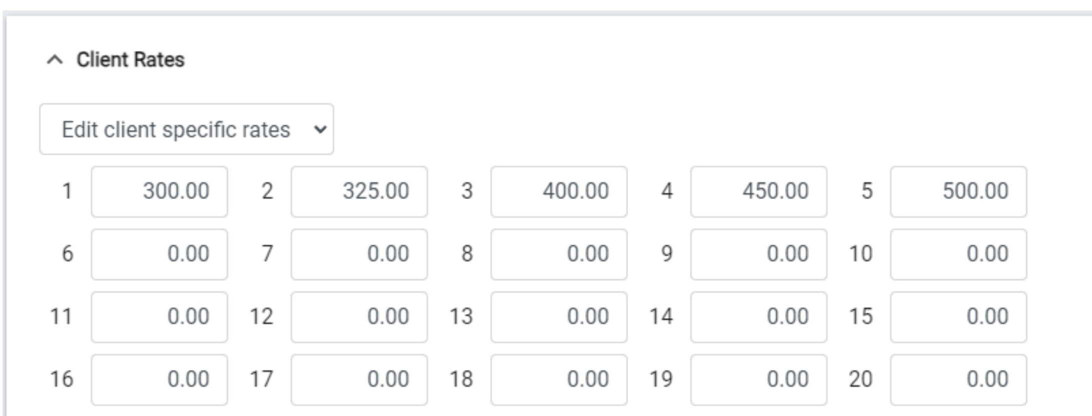
After synchronizing this client with Timeslips Premium, this text will not be visible in Timeslips Go; you will use Timeslips Premium to view and edit the In Reference To.



You can use abbreviations when entering In Reference To text. You can also use private text within the In Reference To text.

Client Rates table

Timeslips Premium and Timeslips Go offer flexibility in how you set up billing rates for your firm. Many firms associate billing rates with their timekeepers, but if your firm associates billing rates with clients, you can use the fields in this section to define those billing rates. All of these fields are optional; you can use as many or as few of these billing rate fields per client as you wish.

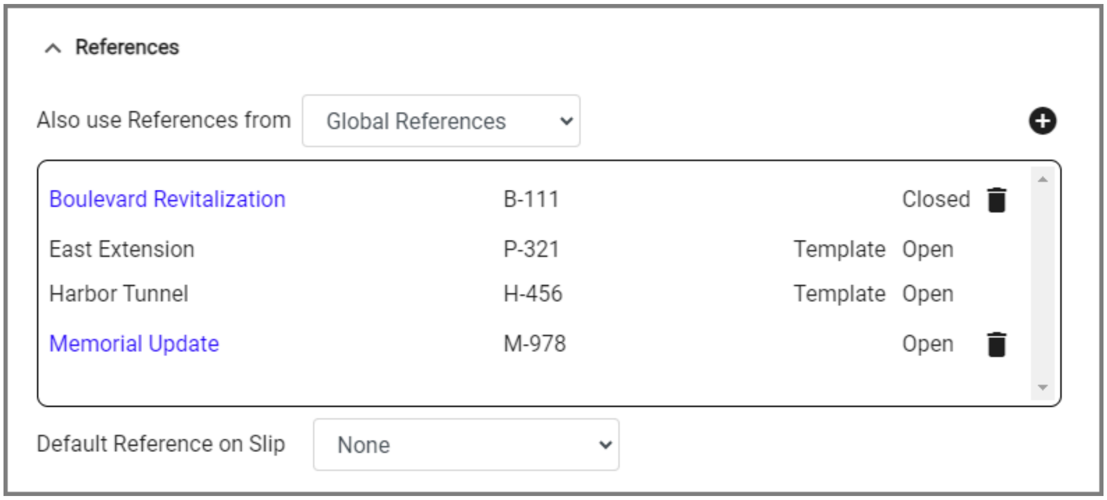


If your clients use additional rate rules, you can set them up in Timeslips Premium after you transfer the new client to Timeslips Premium.

References

You can use this section of the Client Information screen to maintain references for each client. References provide a way to group charges for each client.

Many firms rely on references they're associated with a client template in Timeslips Premium (using the "Also use References from" field but you can also create references specific to the client. See the next section "Creating references" for more information about creating references in Timeslips Go.



When you create a new slip, you can optionally assign a reference to the slip. Later, when generating reports in Timeslips Premium, you can use references to filter slips or to group and subtotal charges.

Creating references

To create a new client:

1. From the main menu to the left, click **Clients** to open the Client List page.
2. Click on the client associated with the new reference.
3. Expand the References section.
4. Review the list to ensure the reference you're creating does not yet exist.
5. Click the plus sign (+) above the list of references.
6. Enter Nickname 1 and Nickname 2 for the new references and click the **Save** button.

The new reference is now available to use on slips in Timeslips Go and will be added to Timeslips Premium when you transfer data next.

Setting up favorite clients

You can optionally maintain a list of favorite clients using the Client Favorites screen. From the Home screen, click your initial in the top right corner, then select **Favorites** > **Client Favorites**.

In areas like slip entry and setting up report filters, you can show favorite clients instead of all clients. This helps make data entry or report generation quicker and easier.

TRANSFERRING DATA

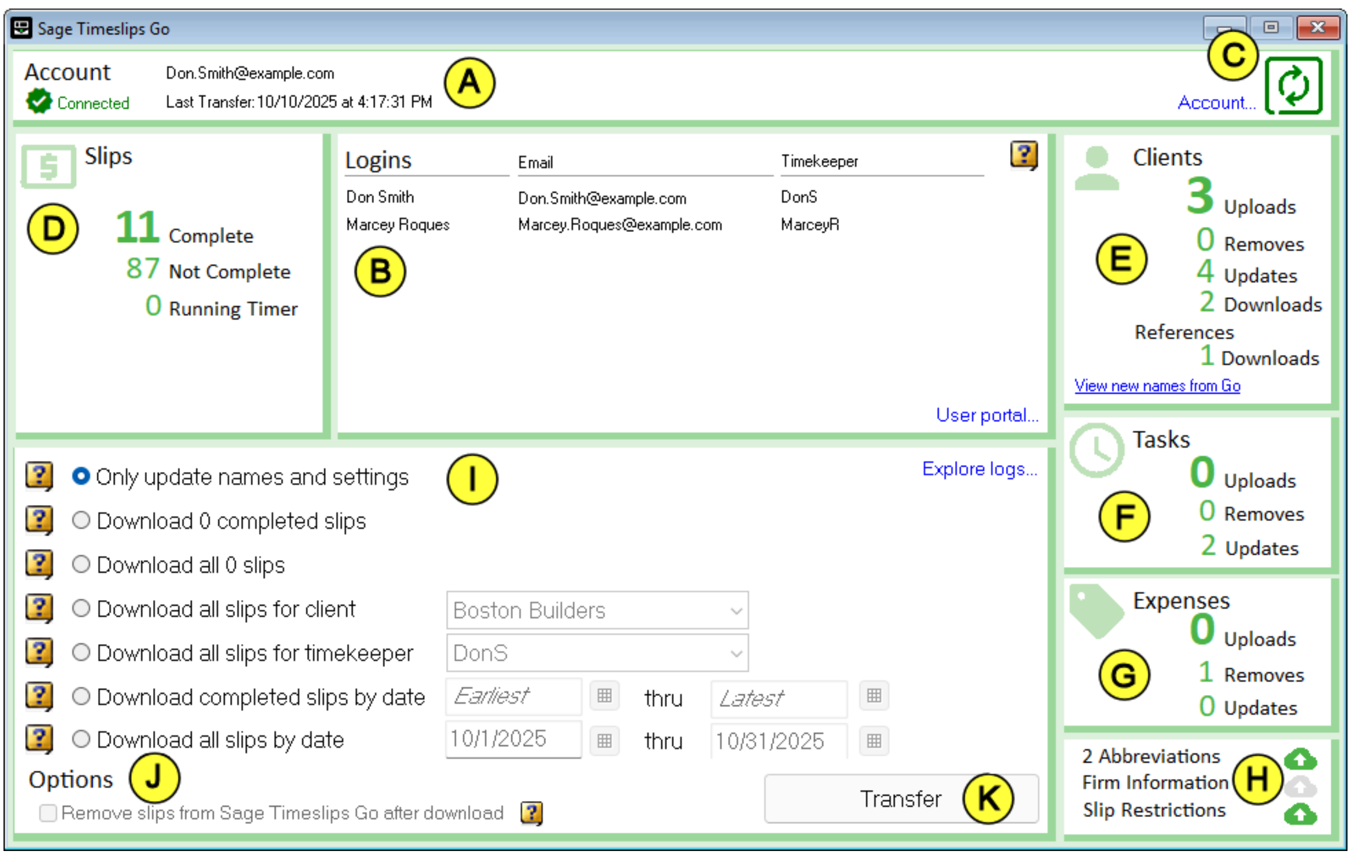
You can use the transfer process to send names and settings from Timeslips Premium to Timeslips Go. You can also use the transfer process to send slips from Timeslips Go to Timeslips Premium for billing and reporting. Transferring data involves the following steps:

- Reviewing the Timeslips Go dashboard
- Selecting the transfer options and starting the transfer
- Reviewing changes before transfer
- Reviewing changes after transfer

Reviewing the Timeslips Go dashboard

In Timeslips Premium, the Sage Timeslips Go screen (also known as the Timeslips Go dashboard) summarizes your firm's Timeslips Go data. Select **Special** > **Timeslips Go** to open the dashboard. You can use it to determine when information in Timeslips Premium is ready to be updated in Timeslips Go and when slips and new names in Timeslips Go are ready to transfer to Timeslips Premium.

The following image provides an overview of the Timeslips Go dashboard:



A - The Account section at the top of the dashboard lists your primary login for your account, the connection status from Timeslips Premium to Timeslips Go, and when you last transferred slips from Timeslips Go to Timeslips Premium.

You can click the **Account...** link in this section to the right to change your account token from Timeslips Go, in case you are having trouble connecting Timeslips Go with Timeslips Premium.

B - The Logins section shows the logins set up in Timeslips Go and the timekeepers they're associated with in Timeslips Premium. If there is an unassigned login listed, open the timekeeper in Timeslips Premium (select **Names** > **Timekeeper Info**) and update the Sage Timeslips Go Email field to match the login email.

You can click the **User portal...** link in this section to the right to open the Sage User Portal, where you can manage your Timeslips Go logins.

C - When you initially open the dashboard, Timeslips Premium displays up-to-date information. As you work, you can click the **Refresh** button at any time to update this information.

D - The Slips section shows information about slips within Timeslips Go that you have not yet transferred to Timeslips Premium. After you transfer slips from Timeslips Go to Timeslips Premium, you can see them in the Time and Expense Slip List (select **Slips** > **Time and Expense Slips**).

E - The Clients section shows information about changes to your clients.

- **Uploads** shows the number of new clients to be transferred to Timeslips Go
- **Removes** shows the number of clients to be removed from Timeslips Go
- **Updates** shows the number of clients to be updated with changed information or references.
- **Downloads** shows the number of new clients created in Timeslips Go to be downloaded to Timeslips Premium.

The bottom of this section also shows information about new references.

- **Downloads** shows the number of new references created in Timeslips Go to be downloaded to Timeslips Premium.

If there are clients or references to be downloaded from Timeslips Go, the **View new names from Go** link will appear. You can click this link to review those new names.

You can review your clients in Timeslips Premium at any time using the Client List (select **Names** > **Client Info**).

F - The Tasks section shows information about changes to your tasks.

- **Uploads** shows the number of new tasks to be transferred to Timeslips Go
- **Removes** shows the number of tasks to be removed from Timeslips Go
- **Updates** shows the number of tasks to be updated with changed information.

You can review tasks in Timeslips Premium at any time using the Task List (select **Names** > **Task Info**).

G - The Expenses section shows information about your expenses.

- **Uploads** shows the number of new expenses to be transferred to Timeslips Go
- **Removes** shows the number of expenses to be removed from Timeslips Go
- **Updates** shows the number of expenses to be updated with changed information.

You can review expenses in Timeslips Premium at any time using the Expense List (select **Names > Expense Info**).

H - The Settings section shows settings that should be updated in Timeslips Go.

- The Abbreviations icon is highlighted if there are changes in database abbreviations to upload (select **Setup** > **Abbreviations**).
- The Firm Information icon is highlighted if there are changes in firm information to upload (select **Setup** > **General** and move to the Address Information page).
- The Slip Restrictions icon is highlighted if there are changes in slip restrictions to upload (select **Setup** > **General** and move to the Slips, A/R, & Funds page).

I - You can use the Transfer section to transfer names and settings from Timeslips Premium to Timeslips Go and transfer slips and new names from Timeslips Go to Timeslips Premium. See the next section "Selecting the transfer options and starting the transfer" for information on each transfer option.

You can click the **Explore logs...** link in this section to the right to open the **Logs\GoTransfers** folder, where you can review logs of past transfers.

J - Use the Options section to determine if slips should stay in Timeslips Go after you transfer them to Timeslips Premium. Some firms may want to keep them in Timeslips Go to review what you've already sent to Timeslips Premium to bill. Other firms may want to remove them automatically so Timeslips Go is not cluttered with past slips.

K - After selecting transfer settings in the Transfer section **(I)** and the Options section **(J)**, click the **Transfer** button to start the transfer process.

Selecting the transfer options and starting the transfer

Before starting a transfer, you can use the dashboard to decide what type of transfer to run (see the previous section, "Timeslips Go dashboard").

Within the Transfer section of the dashboard, choose the option that best applies to your scenario:

- **Only update names and settings** – When using this option, the transfer process will update the lists of names and associated settings for timekeepers, clients, client references, tasks, and expenses in Timeslips Go. The transfer process will also update settings like abbreviations, firm name, and slip restrictions. No slips will be downloaded from Timeslips Go.
- **Download xx completed slips** – When using this option, the transfer process will update names and settings first. The transfer process will then download all slips that are marked as Complete from Timeslips Go.
- **Download all xx slips** – When using this option, the transfer process will update names and settings first. The transfer process will then download all slips from Timeslips Go, regardless of their Complete status.
- **Download all slips for client xx** – When using this option, the transfer process will update names and settings first. The transfer process will then download all slips from Timeslips Go for the client you specify, regardless of their Complete status.
- **Download all slips for timekeeper xx** – When using this option, the transfer process will update names and settings first. The transfer process will then download all slips from Timeslips Go for the timekeeper you specify, regardless of their Complete status.
- **Download completed slips by date** – When using this option, the transfer process will update names and settings first. The transfer process will then download all slips that are marked as Complete from Timeslips Go within the date range that you select.
- **Download all slips by date** – When using this option, the transfer process will update names and settings first. The transfer process will then download all slips from Timeslips Go within the date range that you select.

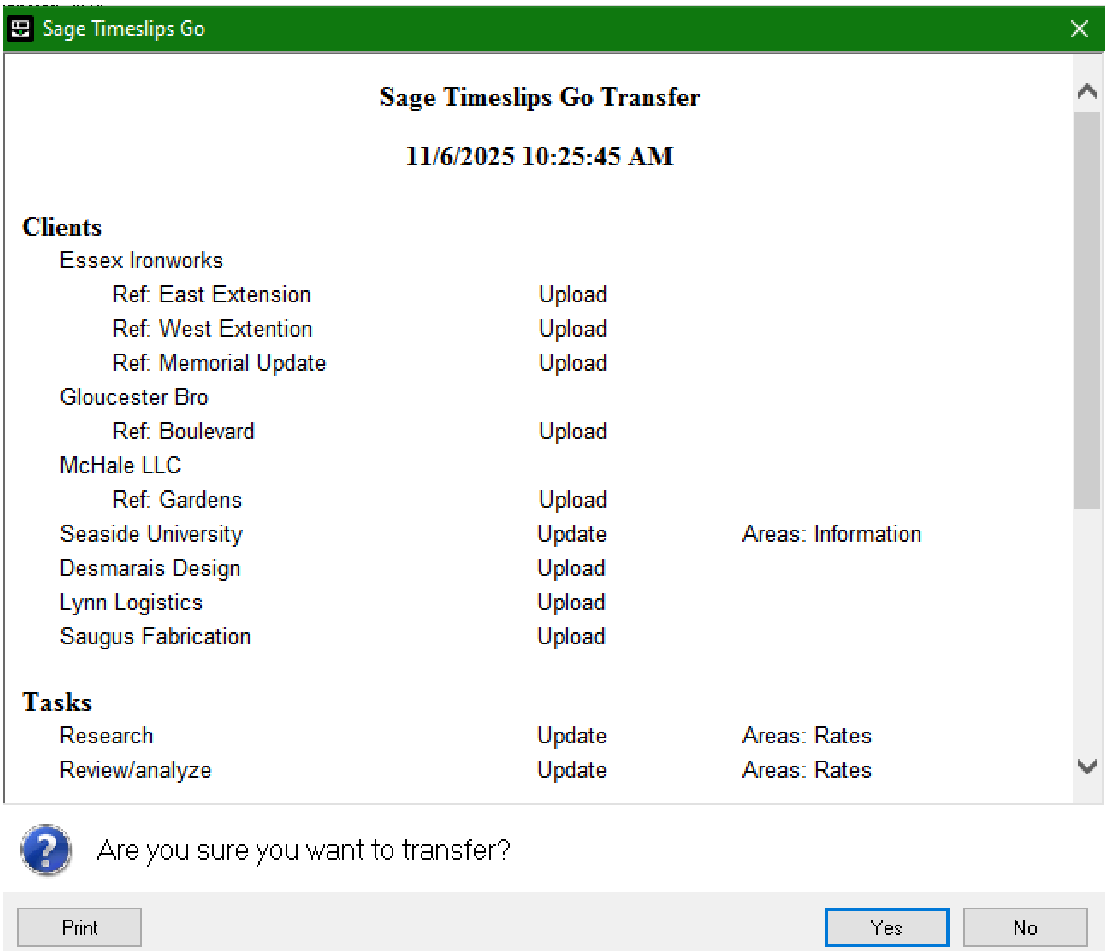
See "Setting Up Other Names and Settings in Timeslips Go" previously in this guide for more information on the types of information the transfer process updates.

Before transferring, either mark or unmark the "Remove slips from Sage Timeslips Go after download" to determine if transferred slips will remain in Timeslips Go.

After choosing your transfer options, click the **Transfer** button to start the transfer.

Reviewing changes before transfer

After you click **Transfer**, Timeslips Premium will open a log file of all changes the transfer process will make.



Scroll through the log of changes. If you are ready to transfer, click **Yes** at the bottom of the screen.

The transfer process will save this log to file within Timeslips Premium in case you need to refer to the details again later. You can click the **Explore logs** link at the bottom of the dashboard to access past log files.

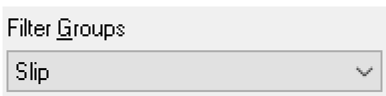
Reviewing changes after transfer

After transferring data, the most obvious changes you can see are new slips in Timeslips Premium. To quickly view slips from Timeslips Go:

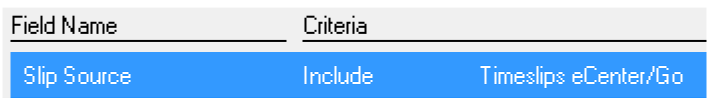
1. In Timeslips Premium, select **Slips > Time and Expense Slips** to open the Time and Expense Slip List dialog box.
2. At the top of the slip list, click the **Selection** button to open the Slip Selection dialog box.

3. Set Filter Groups to **Slip**.

4. Below the Filter Groups field, double-click on **Slip Source**.
5. Right-click and select **None**, then mark **Timeslips eCenter/Go** and click **OK**.

6. Click **OK** to close the Slip Selection dialog box.
7. When you click **Update**, the slip list will show only those slips from Timeslips Go or Timeslips eCenter.
8. You can also use this same filter to show only those slips on a Slip Listing report. You can clear this filter to return the slip list to show all slips.

If you keep slips in Timeslips Go after transferring them, a transferred status will appear on those slips. For example, on the Slips screen and within the Slip Entry screen in Timeslips Go, transferred slips will show:

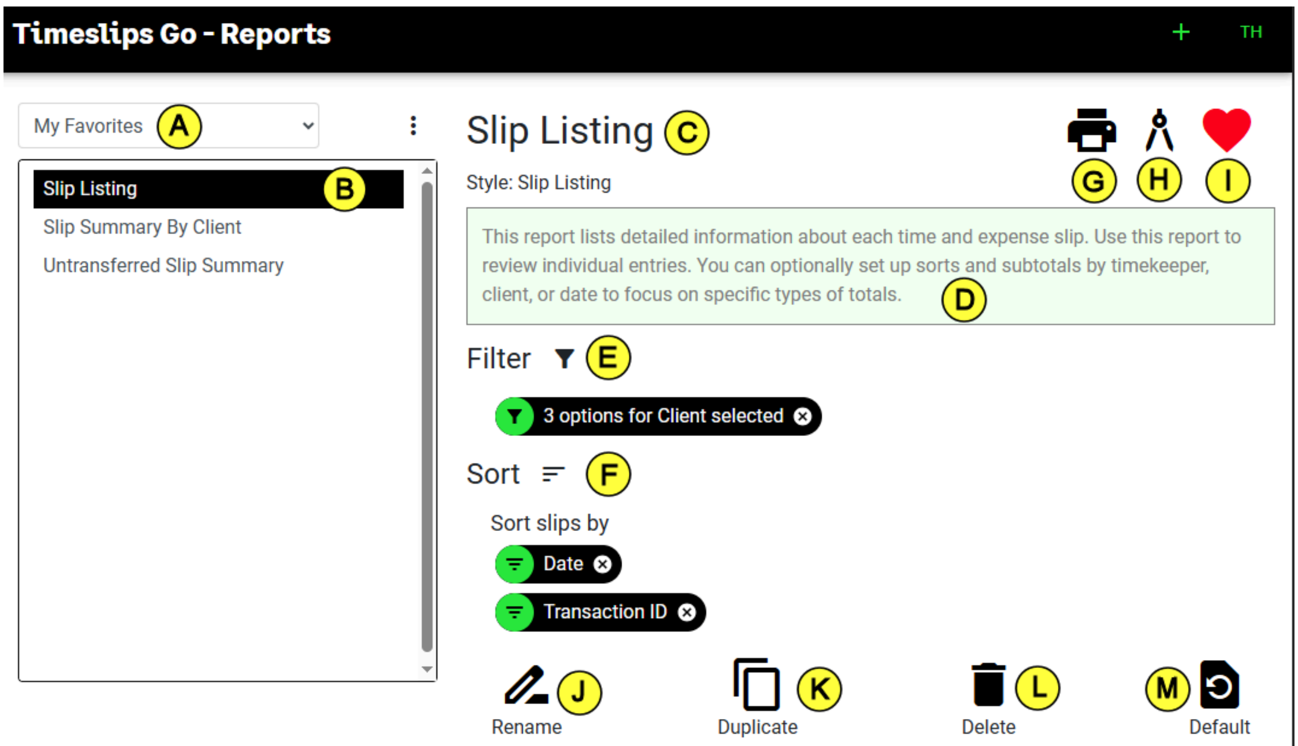
You cannot edit transferred slips in Timeslips Go, but you can edit them in Timeslips Premium before billing if needed. Please note that changes you make to slips in Timeslips Premium will not synchronize back to the original slips in Timeslips Go. This is by design; slip transfers are one-way from Timeslips Go to Timeslips Premium.

GENERATING REPORTS IN TIMESLIPS GO

Timeslips Go provides customizable reports that help you review slips. Each report is different in how it details or summarizes your data. You can use the Reports screen (**main menu** > **Reports**) to set up and print reports.

Overview of the Reports screen

The following image provides an overview of the Reports screen:



A - Select which group of reports to show in the report list (**B**) below. You can view All reports, your Favorite reports, or recent reports.

B - The report list shows the reports from the current report group. When you click on a report, its setup details display on the right side of the screen.

C - The report name for the selected report is displayed at the top of the screen.

D - A summary of the purpose of each report is displayed under the report name.

E - You can add filters to a report to determine the data included. See "Filtering report data" later in this chapter for more information about selecting records to include on a report.

F - You can add sort keys to a report to determine how the data is sorted. See "Sorting report data" later in this chapter for more information about selecting records to include on a report.

G - Click the Print Report button to preview the report on screen. From here you can click **Print** to print this report to a printer or save it to a PDF file to archive or share with colleagues.

H - Click the Design Layout button to open the report designer where you can customize this report. See "CUSTOMIZING REPORT LAYOUTS" later in this guide for more details.

I - Click the Make Favorite to assign the current report as a favorite. It will appear in the My Favorites report group (**A**) for quicker retrieval.

J - Click the Rename button to change the name of the report.

K - Click the Duplicate button to optionally make a copy of the report before making changes to a report.

L - Click the Delete button to remove a report from the report list. Please use this button with caution. This will remove the report for all timekeepers.

M - Click the Default button to reset the report back to its Default state. This will undo all customizations to filters, sorts, options, and the report layout.

Selecting a report

From the main menu, select **Reports** to open the Reports screen. Optionally use the Report Group drop list in the top left to choose a report group; this will limit the report list below to show a specific category of reports.

From the report list, click on a report. The top of the screen will show a short description of the purpose of the report. The right side of the screen will show filter settings, sort settings, and other options.

Filtering report data

When printing reports, you might not want all available data to appear on the report. In the Filters section on the right side of the screen, you can set up selection filters to determine the data that will appear on the report.

Click the Filter button to open the list of available selection filters.

From the list of available selection filters that opens, choose the type of data by which you want to filter the report. Options related to that selection filter will display where you can set up specifics of the filter. You can add multiple filters to further fine tune filtering on the report.

For example, if you are printing a Slip Listing, you can add a Client filter and a Date filter to show slips for a specific client that are within a specific date range.

You can click the x to the right of any current filter to remove it from the report.

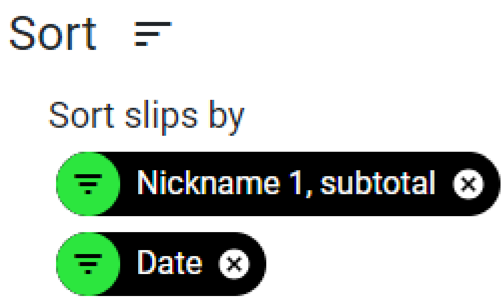
Sorting and subtotaling report data

Sorting data on reports allows you to specify the order in which the information appears. While most reports allow several levels of sorting, in practice you will most likely use one or two levels. Subtotaling data on reports allows you to provide totals for specific groups of information.

Click on the Sort button to open the list of available sort keys.

From the list of available sort keys that opens, choose the type of data by which you want to sort the report. Options related to that sort key will display where you can set up specifics for sorting, such as the direction of the sort and if you also want to subtotal that sort key. You can add multiple filters to further fine tune filtering on the report.

For example, if you are printing a Slip Listing, you may want to sort the report by Client and include subtotals. You can then use Date as a secondary sort so each client's slips are listed chronologically.



You can click the x to the right of any current sort key to remove it from the report.

Designing reports

If you need to add or remove fields from reports, or change the layout of where fields display, or hide or show report sections, you can click the Design Layout button from the top of the screen to open the Report Designer. You should make a duplicate copy of a report before changing the design. See "CUSTOMIZING REPORT LAYOUTS" for more information about designing reports.

Printing reports

When setting up reports, you can click the **Print Report** button from the top of the screen to preview them to display to verify the report includes information in the way you expect.

From this preview window, you can click the **Print** button in the top right corner and choose the destination of the report, such as a connected printer or a PDF file.

CUSTOMIZING REPORT LAYOUTS

When you print reports and bills, Timeslips Go uses layouts to determine how they look when you print them.

When you print reports, you can use selection filters to determine which records are included on the report and you can use sort keys to determine the order of the records and how those records are totalled. These topics are covered in an earlier chapter "GENERATING REPORTS".

You can then design the associated report layouts to determine things like how the report header looks, which data fields are included for each record, how those data fields are formatted, and what fonts are used in different areas of report.

Choosing a layout to customize

Timeslips Go provides a powerful layout designer that you can use to customize report layouts.

You can make a copy of a report before you edit the report layout in case you want to compare results with the original.

To make a copy of a report:

1. From the main menu, select **Reports** to open the Reports screen.
2. From the list of reports, click on the report that you want to duplicate.
3. Click the **Duplicate** button at the bottom of the screen.
4. Use the suggested report name or enter a new report name and click **OK** to save the copy of the report.
5. Click the **Design** button at the top right of the screen to design the report to fit your firm's needs.
6. Click the **Save & Close** button at the top right corner of the screen to save your changes.

To view or design and existing report layout:

1. From the main menu, select **Reports** to open the Reports screen.
2. From the list of reports, click on the report that you want to design.
3. Click the **Design** button at the top right of the screen to design the report to fit your firm's needs.
4. Click the **Save & Close** button at the top right corner of the screen to save your changes.

Working with layout sections

Reports are made up of individual sections.

- Headers appear at the top of the page. A header section might include your firm's logo.
- Footers appear at the bottom of the page. A footer section might include your firm name and a page number.
- Layouts also include other sections that make up the body of the bill or report. Often on bills or slip-based reports, one section might itemize slips and another section might show totals of those slips.

You can customize sections to meet your firm's needs. For example, you might want to increase the size of a section to space the fields in that section differently or you may want to hide a detail section from printing to only show totals.

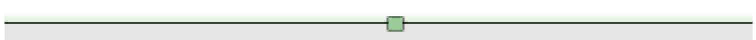
When you are done editing sections, be sure to click the **Save & Close** button at the top right corner of the screen to save your changes.

Resizing a layout section

You can resize a layout section to move fields around or to make room to add more fields.

To resize a section

1. Open the layout you want to customize. See "Choosing a layout to customize" earlier in this chapter.
2. Move to the layout section that you want to resize and click a blank area in that section.
3. A handle (a small square) will appear at the bottom of the section. Click the handle and drag it up or down.

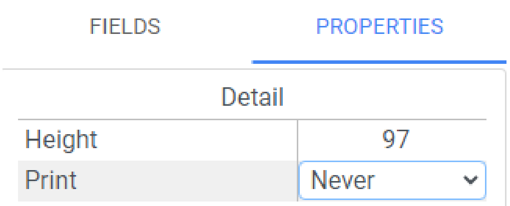


Hiding a layout section

You can hide a layout section if you do not want it to print on your report.

To hide a layout section:

1. Open the layout you want to customize. See "Choosing a layout to customize" earlier in this chapter.
2. Move to the layout section that you want to hide and click a blank area in that section.
3. On the right side of the screen, click the **Properties** tab.
4. Set the **Print** property to **Never**. (You can set it back to **Always** if you want to show it again.)



Working with database fields

When designing reports, you can add database fields to your layouts. These fields represent data from areas of Timeslips Go, usually slip fields, that can print on your reports. A typical use of this is including additional slip details on your itemized reports.

To add a database field to a layout:

1. Open the layout you want to customize. See "Choosing a layout to customize" earlier in this chapter.
2. Move to the layout section where you want to add the database field.
3. Make room for the new field. You may need to move existing fields or resize the layout section to make room for the new field.
4. On the right side of the screen, the Fields list shows the database fields that are available to add. Click on a database field from the list and drag it onto the layout section where you want to add it.
5. While the field is still selected on the layout, switch to the field Properties on the right side of the screen. Here you can change properties like the Width and Height of the field you just placed.

Working with graphic images

When designing reports, you can add graphic images to your layouts. A typical use of this is including your firm's logo in the header that will print at the top of the report.

To add a graphic image to a layout:

1. Open the layout you want to customize. See "Choosing a layout to customize" earlier in this chapter.
2. Move to the layout section where you want to add the image. Optionally, move existing fields or resize the layout section to make room for the image.
3. From the top of the Designer, click the **Add Graphic** button and then click within the layout section to place the graphic.
4. In the Select Image screen, if the image does not exist yet, click **Upload**, find and select the image on your computer, and click **Open**.
5. In the Select Image screen, click on the image to place and click the **Done** button at the top of the screen.
6. Optionally you can use the mouse to resize the image and move the image, otherwise you can use the Properties on the right side of the screen to make these changes.

Resetting a layout to its default

When designing reports, you may have made changes to the layout without making a copy of the original layout and now you want to return to the default design. Timeslips Go can reset a report layout to that original state as if you had just created the layout. Be careful resetting layouts, you cannot undo these actions.

To reset a report layout:

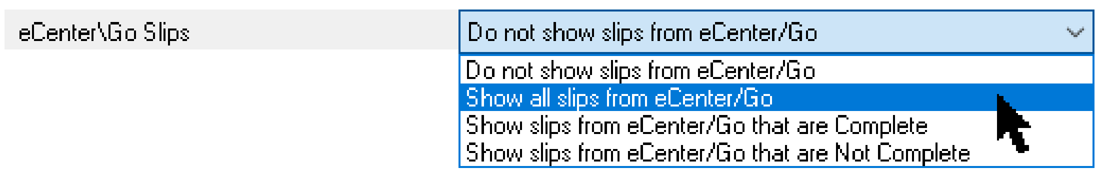
1. From the main menu, select **Reports** to open the Reports screen.
2. From the list on the left, click on the report that you want to reset.
3. At the bottom of the screen, click the **Default** button.
4. If you want to reset this report layout, click **Yes**.

GENERATING REPORTS IN TIMESLIPS PREMIUM

When generating slip-based reports in Timeslips Premium, you can include slips from Timeslips Go that you have not yet transferred. Within the Report Options dialog box, there is a eCenter\Go option that allows this.

For example, if you are printing a Slip Listing report, you can include slips from Timeslips Go.

1. In Timeslips Premium, select **Reports > Slips** to open the Slips page of the Report List dialog box.
2. Double-click on Slip Listing to show settings for that report.
3. At the bottom of the Report Entry dialog box, click the Options button.
4. Within the Report Options dialog box, choose which types of slips from Timeslips Go you want to include on the report.



5. Optionally, determine if you want to show slips from Timeslips Premium on the report too or if you want to show only those slips from Timeslips Go.

Where to Get Additional Help

Along with this user's guide, you can find help in the following ways:

Support Chatbot

Ally, our support chatbot, specializes in answering questions about Timeslips Go.

Click the Chatbot icon in the top right corner of the screen to start a session.

Timeslips Community Hub

Our community hub includes quick access to forums for announcements and general discussions about our products. Click your initials in the upper right corner of the screen and select **Online Community** > **Sage Timeslips - Community Hub** to access these forums.

Timeslips Knowledgebase

Our knowledgebase includes articles and solutions for common issues. Click your initials in the upper right corner of the screen and select **Sage Support** > **Knowledge Base** to access the knowledgebase.

Live Chat

You can chat with a live Support Technician using the Live Chat. Click your initials in the upper right corner of the screen and select **Sage Support** > **Live Chat** to access the live chat.