

Timeslips by Sage Fixed Asset Advanced Training Class



This course is ideal for the person who has had some experience with the basic features of Timeslips. This training will discuss some of the more advanced features, such as, custom fields, reports and custom reporting, template clients, categories, replacement slips, client funds, security and some new features introduced in Version 11.

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

Client Information

Template Clients- ability to track your own custom information. Template clients save your company valuable time when defining clients.

Automatic Rate Rules- rules for determining rates on slips for your clients.

Importing and exporting client information

Client Funds- tracking retainers and manage trust funds, for your clients.

Text Search- to find specific text within specific areas of the database. (conflict checker)

Grouping

Custom Fields- ability to track your own custom information.

Categories- grouping related tasks and expense activities together during billing for accounting purposes.

Replacement Slips- replaces a group of slips of a given type with one entry on the bill.

Reporting

Timeslips Reports- reports that are defined in Timeslips.

Selection

Sorting

Options

Formats

Saving Report Criteria

Slip User-Defined Report - Custom Report you design.

Client User-Defined Report - Custom Report you design.

Add a Report Wizard- help in finding the report that you need and defining your own reporting tab.

Security

Global Security

Security Profiles

Timekeeper Rights

