

Timeslips by Sage Fixed Asset Basics Training Class

This course is ideal for the beginner who wants to learn the basic features of Timeslips. The course will guide you through the process of entering in your timekeepers, clients and tasks, as well as - tracking your time and expenses, entering transactions, and generating reports and bills. Upon completion of this training, you will be ready to use Timeslips for your own billing.

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

Company Set-up

Firm Information -contains your company's name, address, and phone information.

Customize Terminology- phrasing that is customizable, enabling you to change it to fit your office.

Aging Periods-Sets the aging periods that track overdue balances and calculate interest

Data Entry

Defining Timekeepers - the person who bills for their time or expenses

Entering Clients - the person being charged for work performed by your company.

Client Matters

Client References

Master Clients

Defining Tasks & Expenses - events that make up the parts of a particular job.

Entering Time & Expense Slips

Abbreviations- allow you to abbreviate frequently typed words, phrases, and sentences. partially billed.

Markup and Adjustments of slips- allows you to alter the value of the slip before it is billed.

Pre-billing Reports

Pre-Bill Worksheets-includes all the billing data that has not yet appeared on a final bill.

Slip Detail Reports --provides detailed information about each time and expense slip.

Making Corrections

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

Generating Bills

Bills are the final product that you send to clients, listing work performed, expenses incurred, charges due, and payments received.

Entering Transactions

Entering financial exchanges between you and your clients that affect the client's accounts receivable balance. They track client charges through invoices and responses to those invoices through payments, credits, write-offs, and refunds.

