Timeslips Hidden Treasure # 4 – Client Hold

This Hidden Treasure focuses on an issue that may not come up very often, but when it does it can be a bit confusing. If you find it necessary to hold a bill on certain clients, Timeslips provides two ways to put billing activity on hold. When entering slips, there is a Hold feature that keeps individual slips from billing. A slip hold is nice if you only want to exclude specific slips but bill that client for others.

On the other hand, if you want to keep the entire bill from generating, it is easier to put the client on hold than to hold all of his slips individually. Following are the steps to activate a client hold in the client information screen. I've also included directions for creating reports that will help you to manage clients who are on hold.

To activate client billing hold

1. Select **Names/Client Info** from the menu bar.
2. Double-click the name of the client who will be receiving the hold.
3. Select the **Arrangement 1** page.
4. Complete the "**Hold Information**" section at the bottom of the screen to specify the type of hold desired (Time Charges, Expense Charges, Full Fill or A/R Transactions).

Hint Choosing **Full Bill Hold** will hold both time and expenses but, when you print the Pre-Bill Worksheet, there will be a message indicating that the client is on full bill hold and slip details will not show. To monitor details of slip activity for clients on hold, instead of flagging Full Bill, it may be better to flag Time and Expense Charges in this area so that the Pre-Bill Worksheet will show each slip with a "Client Hold" referenced in the billing status field.

5. In the next cell, select the hold frequency:

Off: Not on Hold, bills generate if they are referenced in the selection criteria.
On next bill: Holds the client's bill on the next bill run and automatically releases it for the following bill run.
On all bills: Keeps the client's bill on hold until you manually turn off the hold option.

6. The last two cells allow you to hold a client until a certain slip dollar value or number of hours is reached. When the designated dollars or hours are met, the client will automatically be released from hold.

Managing clients on hold using the Charges on Hold Analysis Report

1. Open the report catalog by selecting **Reports/Reports** from the menu bar.
2. Click on the **Client** page.
3. Double-click on the "**Charges on Hold Analysis**" report.
4. Print the report to Display or Printer to view all clients for whom you have set a hold. This report will also tell you the value of hours, fees and costs for clients on hold.

Managing clients on full bill hold using Pre-Bill Worksheet Report

1. Select the **Bills/Pre-Bill Worksheet** from the menu bar.
2. Set the Selection and Sorting criteria as normal for your bill run.

Hint use the same settings you plan to use when generating bills.

3. Select the **Options** page.
4. Change the "Show Bills on Full Bill Hold" option to Yes. This is the only way to see a client that is on full bill hold while printing the Pre-Bill Worksheets. This setting is not required if the hold is set separately for time and expense charges in the client information screen.

We know that some of the most useful features of any software program are often not intuitive and hope you find this Timeslips Hidden Treasure useful in your business. We encourage you to forward this e-mail to a friend whom you think would find it valuable. Please contact me with suggestions for future “Hidden Treasures” topics or if you are interested in receiving previous issues.

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