

## Timeslips Hidden Treasure #8 – Proof Stage: Clear or Revision?

In a networked environment where timekeepers enter their own time it is not uncommon to have slips added after a bill has been created. Usually, but not always, these late slips are dated prior to the cut-off date of the original bill. Timeslips provides a safety net by allowing you to put a bill into Proof Stage so you can review, edit and/or void it prior to sending to your client. Once any errors are corrected simply clear the bill from Proof Stage and regenerate it.

But, what do you do if there were originally five slips on the bill and now there are seven? The partners probably based their billing decisions on the original five slips, not seven. What should you do with the two additional slips?

When bills are cleared from Proof Stage to be regenerated there are two options - Clear or Revision Stage. This Timeslips Hidden Treasure will explain the difference between Clear and Revision Stage so that you will be better equipped to decide which option is best for your firm.

In Timeslips, once the Generation of Bills is complete, a box will appear asking you what you want to do next:

1. Put bills in Proof Stage while reviewing them
2. Approve all bills just printed
3. Approve selected bills from those just printed.

We recommended that you select option # 1: "Put bills in Proof Stage while reviewing them." This is your 100% guarantee that you can correct any errors found on a bill prior to mailing it to a client. Bills that require editing must be cleared from Proof Stage and regenerated in order to send to your client.

If an error needs correcting and the bill regenerated, first clear bill from proof stage by:

1. Selecting **Bills/Approve or Clear Bills** from the menu bar
2. Selecting the clients whose bills require edits by clicking a check mark next to the client's nickname
3. Selecting the **Clear** button

After selecting which clients to clear, you will see the following Clear Proof Stage message:

"If you want to include the same slips and transactions the next time you print a bill for this Client, choose Revision. Otherwise, click Clear to remove the bill from Proof Stage."

The results of selecting the available options are explained below:

**Cancel:** Discontinue clearing a bill from Proof Stage. Nothing happens to the bill.

**Clear:** Removes the bill from Proof Stage and voids the invoice. Edits can be made to the bill content and when the bill is regenerated, the new bill will include any new slips added since the first bill was created - provided they are within the date range selected for the bills. For example, if the first bill had five slips and then two new slips were added within the billing date range, the new bill will include seven slips. Use this option if you want the new bill to include all added slips within the date range.

**Revision:** Removes the bill from Proof Stage and voids the invoice. Edits can be made to the bill content and when the bill is regenerated, the same slips and transactions included in the first bill will be included in the next bill even if someone has entered a slip within the selected date range. For example if the first bill had five slips and then two new slips were added within the billing date range, the new bill will include only the original five slips. This option is available to accommodate management billing decisions based on five slips not seven. The remaining two slips will be included on the next month's bill.

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. Please contact me with suggestions for future "Hidden Treasures" topics or if you are interested in receiving previous issues:

- Hidden Treasure #1 – Right-Click Menu options
- Hidden Treasure #2 – Time Entry Shortcuts
- Hidden Treasure #3 – Credits on Bills
- Hidden Treasure #4 – Client Hold (putting billing activity on hold)
- Hidden Treasure #5 – Unapplied Payments
- Hidden Treasure #6 – Billing Assistant
- Hidden Treasure #7 – Closing Slips

We encourage you to forward this e-mail to friends who would find it valuable. Thank you for your interest and support.

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