

Timeslips Hidden Treasure #12 – Closing Slips

Here's a little treasure that can really help make working with Timeslips much more efficient. Over time, the file where time and expense slips are entered (the open slip file) becomes very large and can slow processing down.. Moving your billed and approved slips to a closed slip file can save considerable time when you generate bills and run most reports. Even though closed slips cannot be viewed in the show slips (slip listing) option, they are available in reports. Follow these steps to perform the close slip function and optimize your Timeslips® database:

1. From the menu bar, select **Slips | Close Slip** to open the Close Slips dialog box.
2. Use the "**Limit slips to**" field to determine which slips to close. (**Visions** recommends "billed not exported older than 3 months," which leaves the past three months viewable in the Show Slips listing)

***Note:** If you select "Use filters to close slips", you must click **Filters** to open the Close Slips Selection dialog box, where you can set up the slip filters.*

3. Make sure the "**Include slips on undoable approved bills**" option is not selected.
4. Verify your selections and click **OK**.
5. When it finishes closing slips, click **OK** in the Close Slips Selection dialog box.

***Note:** To include open and closed slips in reports, select the **Classification** field from the Slip List selection option in the reports catalog and mark both open and closed.*

If you are uncomfortable performing the above steps, one of our consultants is available on **Visions'** Timeslips Help Desk at (858)724-0044 to assist you. Telephone support calls are billed at your normal hourly rate in 10-minute increments or, if you are on a **Visions** Support Plan, there is no additional charge for telephone support.

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 #01 – Right-Click Menu options
- Hidden Treasure #02 – Time Entry Shortcuts
- Hidden Treasure #03 – Credits on Bills
- Hidden Treasure #04 – Client Hold (putting billing activity on hold)
- Hidden Treasure #05 – Unapplied Payments
- Hidden Treasure #06 – Billing Assistant
- Hidden Treasure #07 – Closing Slips
- Hidden Treasure #08 – Proof Stage: Clear or Revision?
- Hidden Treasure #09 – Deleting Temporary Files
- Hidden Treasure #10 – Fixing Balances
- Hidden Treasure #11 – Database Security

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

Claire L. Barnes, President
Integrated Visions, Inc.

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