

Timeslips Training Class Billing Cycle



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Timeslips Software Billing Cycle - Would you like to customize Timeslips terminology, bill formats and learn how to use the advanced powerful features found in Timeslips Software? This course is ideal for the person who has had some experience with the basic features of Timeslips but wants to know how to make the billing process faster and easier. Bills can be highly customized to list services rendered, expenses received, charges due, and payments received. They are the result of content, format, and placement decisions made throughout Timeslips. Because a bill's look, language, and detail level are the result of many interrelated decisions, you should understand the process as well as the various tools in producing and managing your client bills:

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

- **Slip Entry – Tracking Time & Expenses**
 - Using Slip Options
 - Billing Statuses
 - Slip Adjustments
 - TS Timer
 - Time Sheet Slip Entry
- **Billing Arrangements**
 - Flat Fees – minimum, maximum and absolute fee
 - Contingency
 - Job
 - WIP
 - Bill Adjustments
 - Progress and Interim Billing
- **Client Funds**
 - Track Retainer Fees
 - Manage Trust funds
 - Track Escrow Accounts
- **Entering Transactions**
 - Payments
 - Credits
 - Write Off
 - Refund
 - Reverse Payment
- **Preparing for Billing**
 - Using the Pre-bill Worksheet
 - Using Filters and Sorts
 - Report Options
 - Report Wizard and Customizing a Report
- **Making Corrections in Billing**
 - Using the Billing Assistant
 - Edit Slips, Delete Slips and Create New Slips
 - Using The Payments and Other A/R Tab
 - Balances Tab
 - Funds Tab
 - Using Firm Assistant
- **Basic Bill Design and Formatting**
 - Choosing a Pre-Design Layout
 - Select Bill Detail
 - Design View to Customize the Bill Layout
 - Layout Menu for Global Options
 - Phrase Tab to Modify Phrasing
 - Font Styles
- **Generating Bills**
 - Selecting Clients
 - Printing Bills
 - Emailing Bills
 - Bill Stages
- **Reports**
 - Aged A/R Balances Report
 - Generating Statements



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