What's New

Office Timesheets Version 7

(Core & Time Billing Editions)

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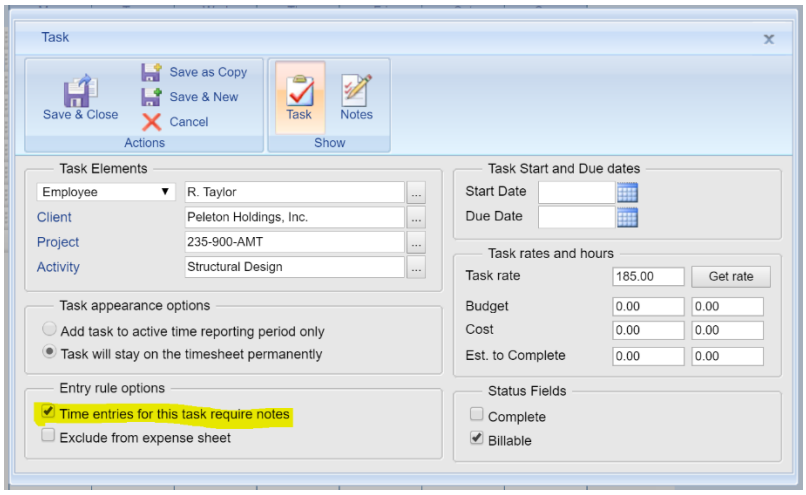
Office Timesheets Core Edition

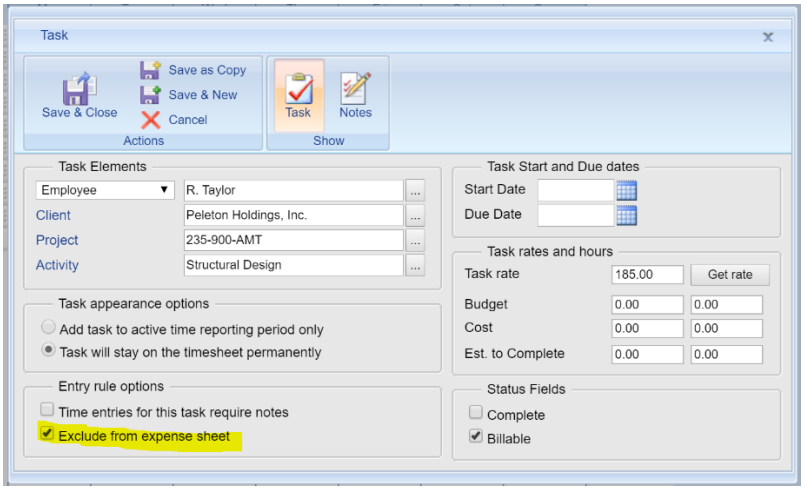
Require time entry notes for specified tasks

Office Timesheets now allows you to specify tasks that will require notes when entering time against them. The option is located in the task dialog, under the grouping "*Entry rule options*"; and entry rule options will only become visible when activated in the *Task* area of Security Policies (see *Security control for entry rule options* feature below).



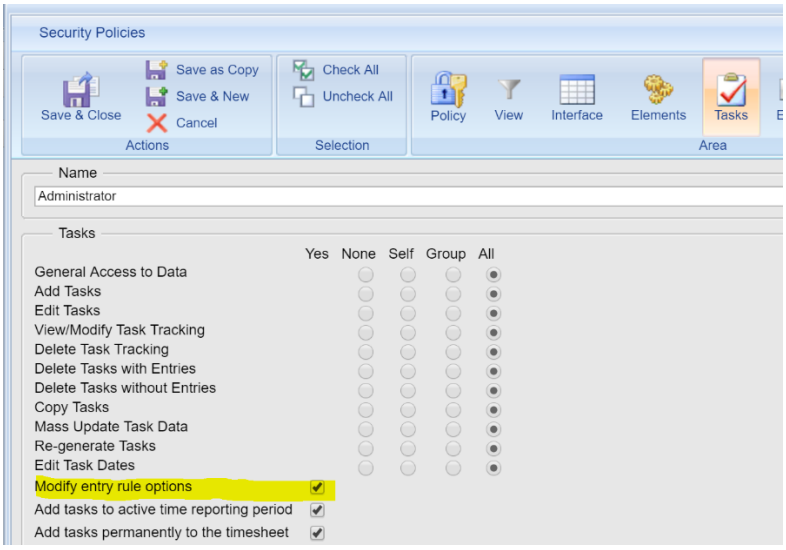
Excluding specified tasks from the Expense Entry Sheet

Also, as part of *Entry rule options* for tasks is the option to exclude specified tasks the Expense View. When the option "Exclude from expense sheet" is checked, the specified task will be excluded from the Expense View.



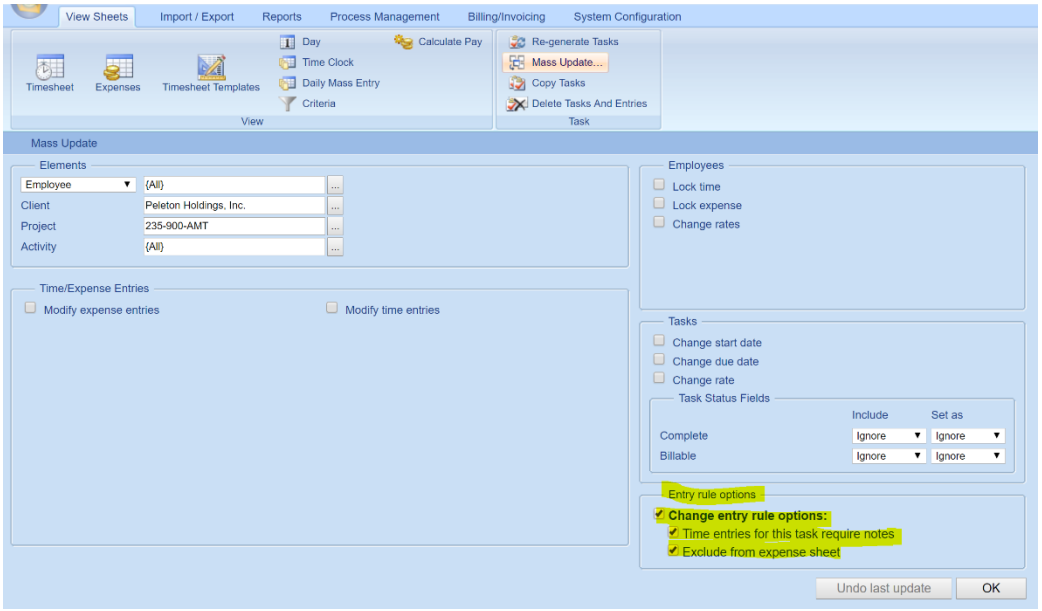
Security control for entry rule options

Access to Entry rule options is granted via the *Task* area of Security Policies. By default, Entry rule options are disabled, and thus, must be enabled for any security policy you wish to have these options.



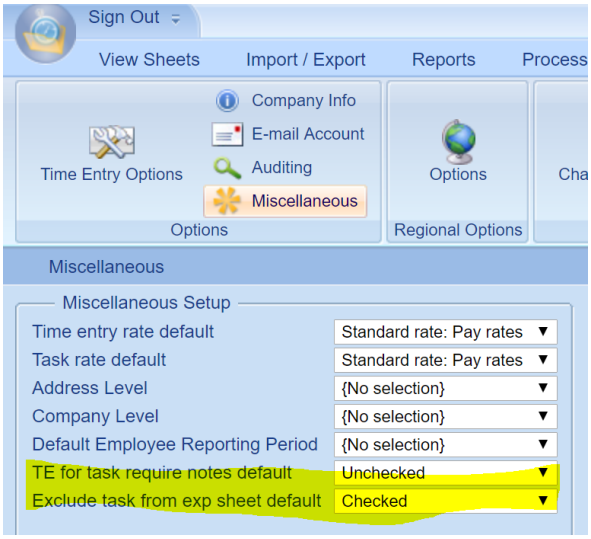
Mass Update Entry Rule options

Mass update now also includes the options to mass update both Entry Rule Options allowing you to update task's entry rule options in large batches.



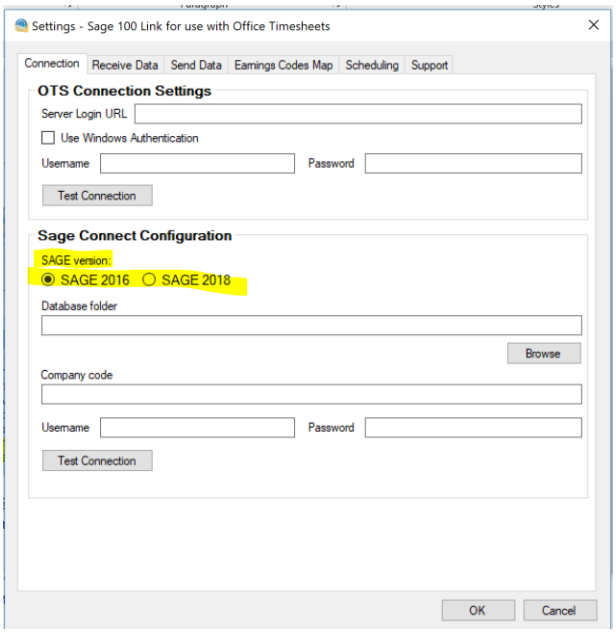
Default settings for entry rule options

Miscellaneous options in the System Configuration tab now also lets you to set the default options for both Entry Rule options. For example, if you wish to exclude all new tasks, by default, from appearing on the Expense View you'd set the corresponding default option to "**Checked**".



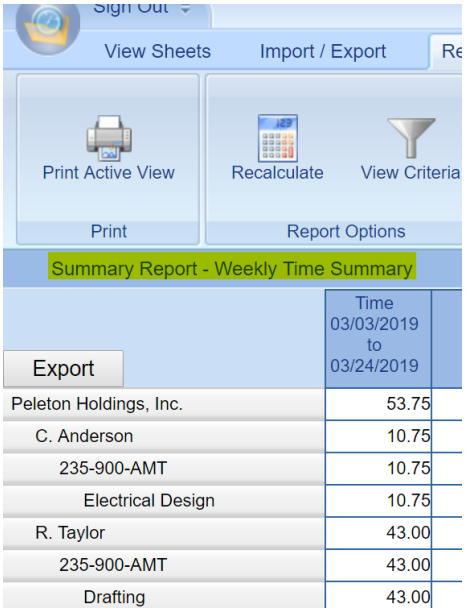
Sage 100 2018 and higher integration (completely re-written t)

Office Timesheets' Sage 100 integration has been completely re-written to work with Sage's all-new TimeTrack module and user privacy requirements for 3rd party applications; and now includes the option to work with Sage 100 2018 and higher version; or Sage 100 2017 and lower versions.



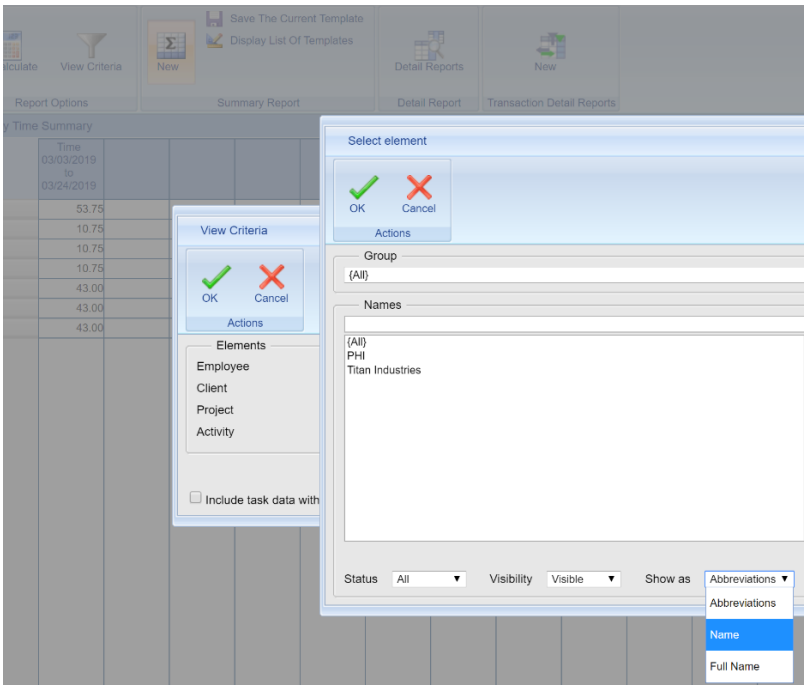
Display the name of the template loaded in Summary Reports

Now, when loading a previously saved Summary Report template, the name of the template is visible in the Summary Report view.



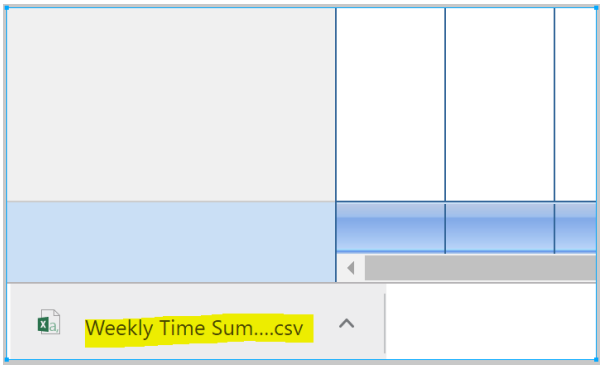
Element list "Show as" settings now show in Summary Report output

You now have to option to select which name field you wish to view for each element level in Summary Reports. To change these settings, run your Summary Report; then click on the **Criteria** icon; click on an *Element Level* selector; and then choose between **Abbreviation**, **Name** or **Full Name** for the selected level; click **OK** and then click the **Recalculate** icon to refresh the report …



Summary Reports export file now defaults to name of the template

With Office Timesheets Version 7, when you export a Summary Report, the file name will default to the name of the Summary Report Template …

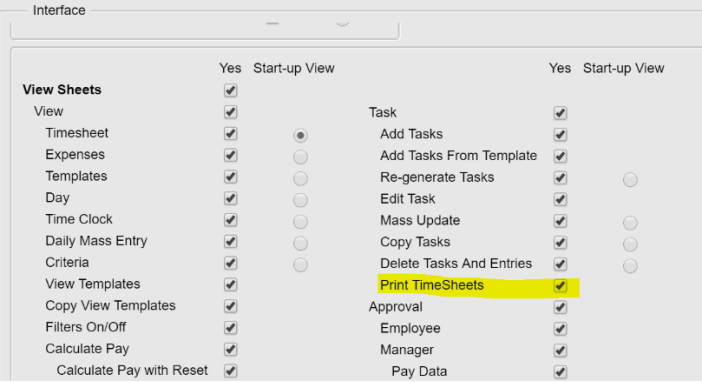


Transaction Detail Reports - create a new report from an existing report

With Office Timesheets Version 7, you can now create a new Detail Transaction report from an existing report template. With a Detail Transaction Report template loaded; make modifications to the report; change the name of the report template in the *Name* field; and then click the **Save the Current Template** icon. A new template with be saved, while preserving the original template in your template list.

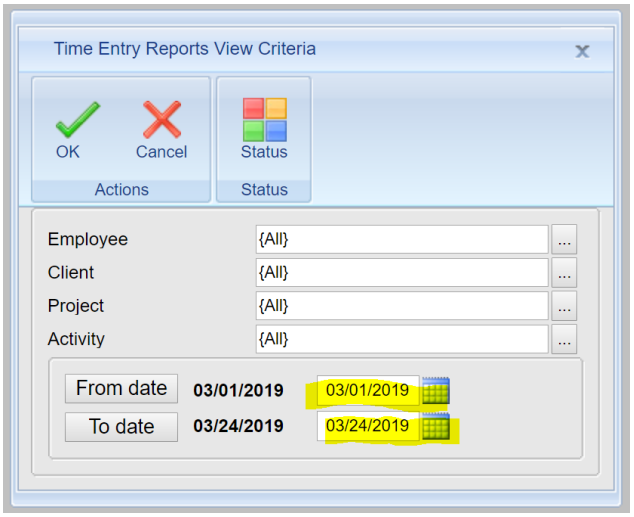
Ability to show or hide the "Print Timesheet" option in View Sheets tab

Office Timesheets Version 7 now offers the ability to show/hide the Print Timesheet icon in the *View Sheets* tab. To access this option, open a selected security policy; navigate to the *Interface* area; scroll down to the *View Sheets* grouping; and check/uncheck the **Print Timesheets** checkbox.



Enter From and To date directly from View Criteria screen of Detail Reports

Due to very popular demand, we've added **From date** and **To date** controls directly within the *View Criteria* dialog, without having to click on the **From date** and/or **To date** buttons …



Time Billing Edition Highlights

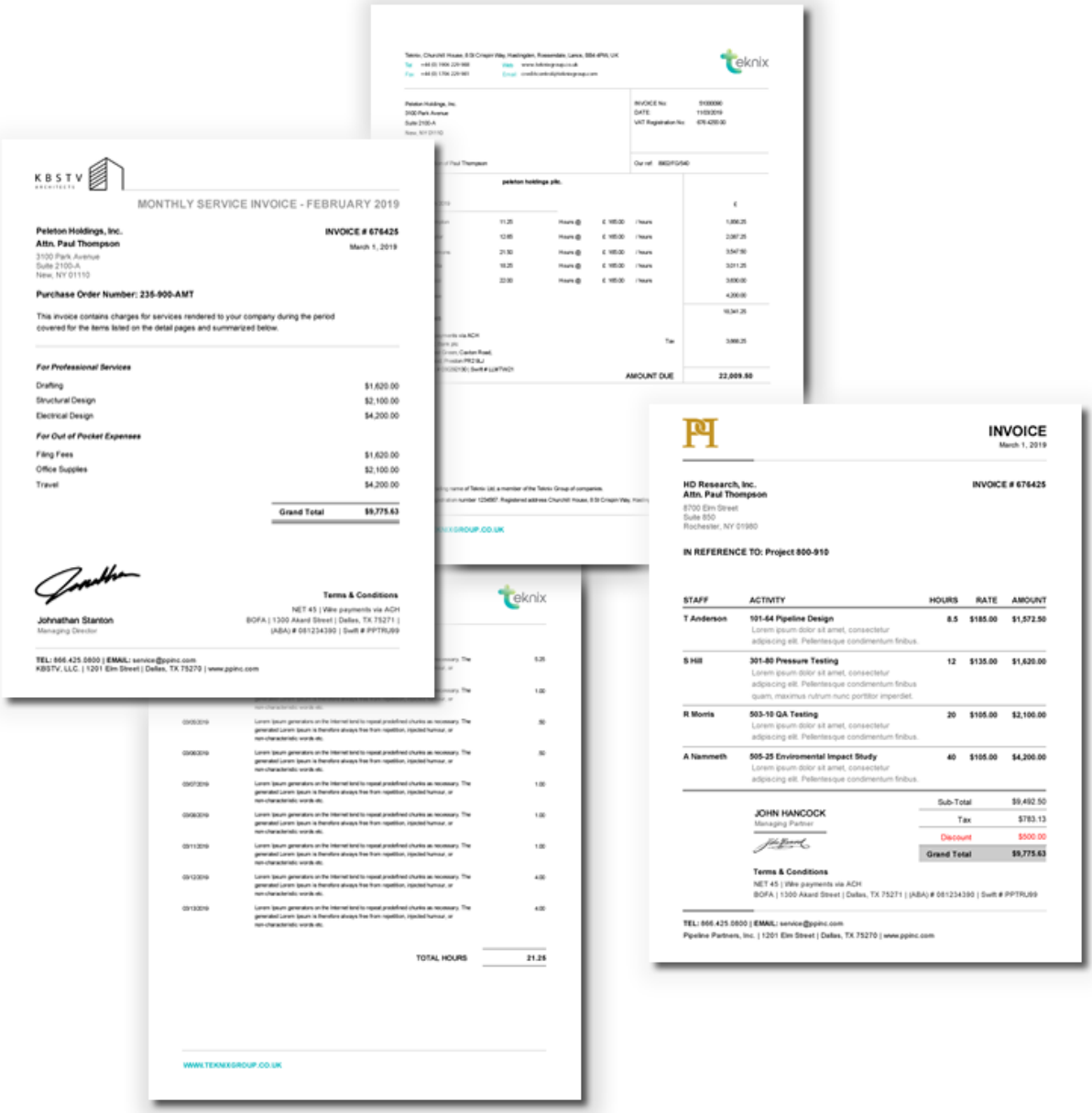
With the release of Office Timesheet Version 7, Lookout Software now offes a new edition of Office Timesheets: Time Billing Edition. Office Timesheets Time Billing Edition combines a complete Time Billing application that is tightly integrated with Office Timesheets Core Edition. Office Timesheets Time Billing Edition includes hundreds of integrated time billing features. Below are some of the new Time Billing Edition's highlights.

Custom Invoice Templates

Invoice templates are used in creating a single invoice or a batch of invoices. The invoice template will

determine the design/layout of the invoice as well as the content displayed on the invoice(s). Each installation of Office Timesheets can contain an unlimited number of invoice templates. This allows Office Timesheets users to create one set of invoices with a specific design and layout, and other customer invoices with a different invoice layout and design.

You can create templates using Time Billing Edition's built-in Invoice Template Designer; or you can order one or more custom invoice template(s) from Lookout Software, created from your exact specification.

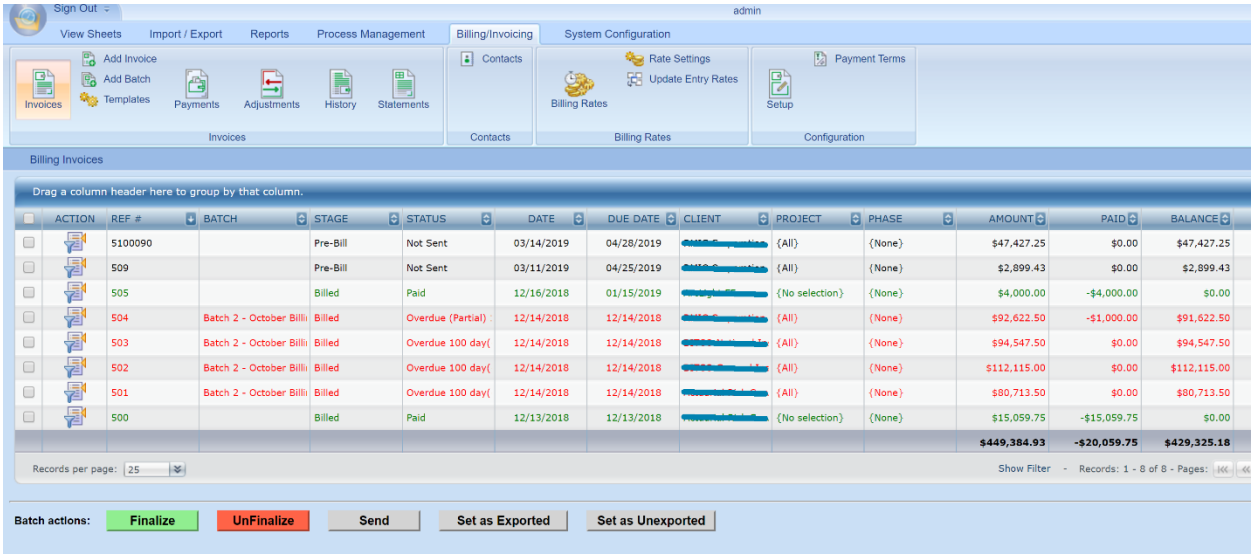


Invoice Tracking and Management

Office Timesheets Time Billing Edition includes comprehensive invoice management and tracking. The

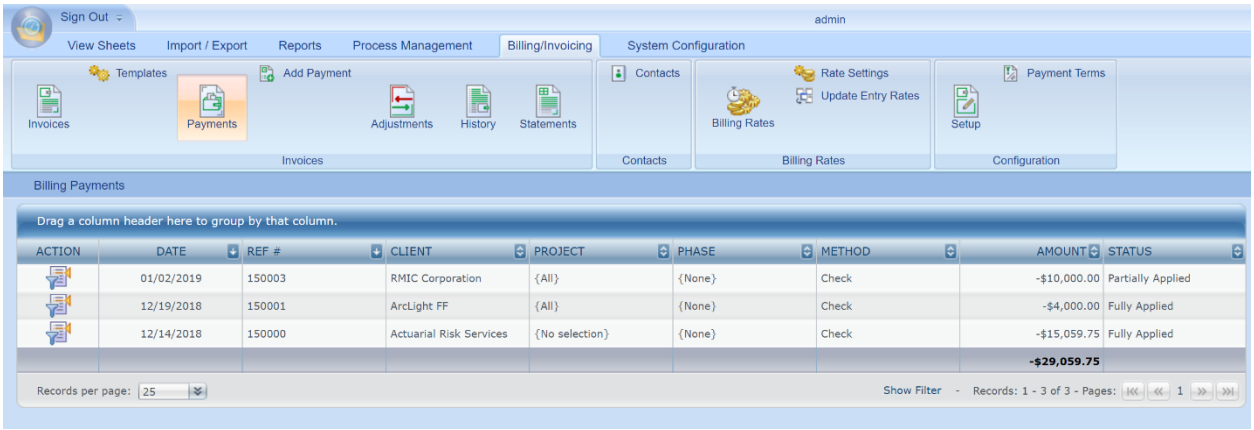
invoice grid is highly inter-active and provides several easy-to-use tools that allow you to view invoices and invoice data practically any way you wish. You can also perform an impressive list of invoice actions from the Invoice Grid, including but not limited:

- Finalizing one or more one invoices
- Editing existing invoices and/or invoice batches
- Viewing and/or printing invoices
- Email invoices to one more client contacts
- Viewing email history of invoices



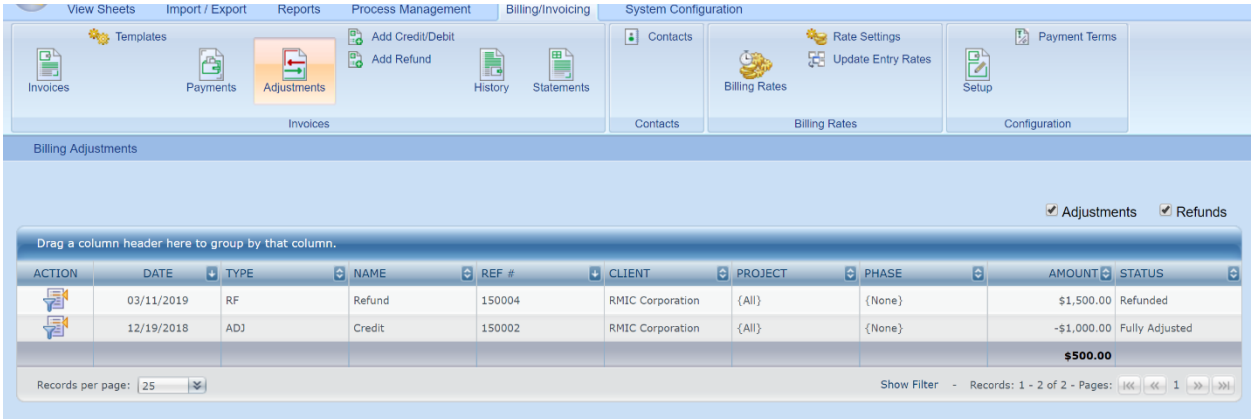
Invoice Payment Tracking

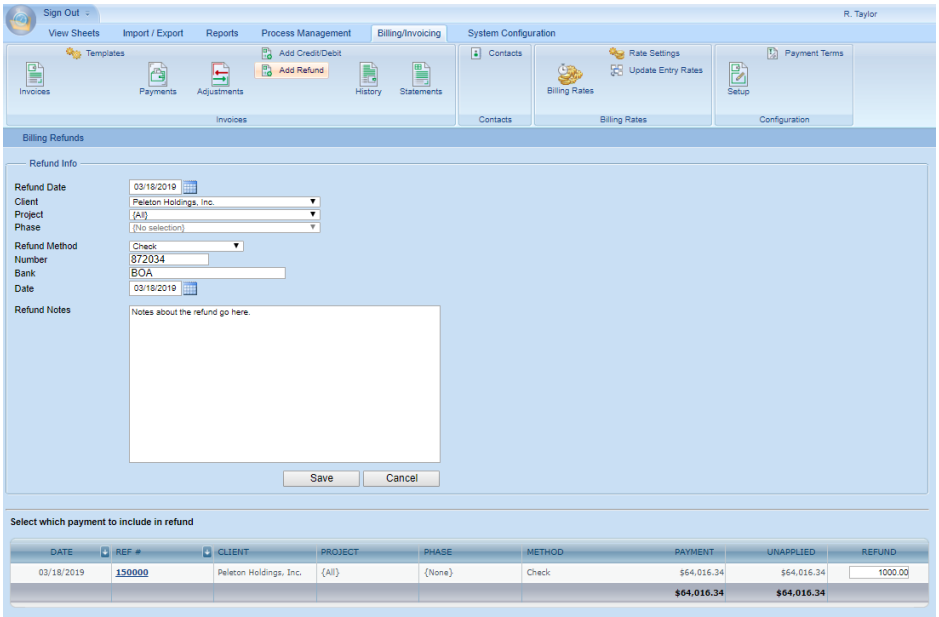
Office Timesheets Time Billing Edition also offers comprehensive payments management where users can apply, manage and track all payments.



Invoice Adjustment Tracking (Credits, Debits and Refunds)

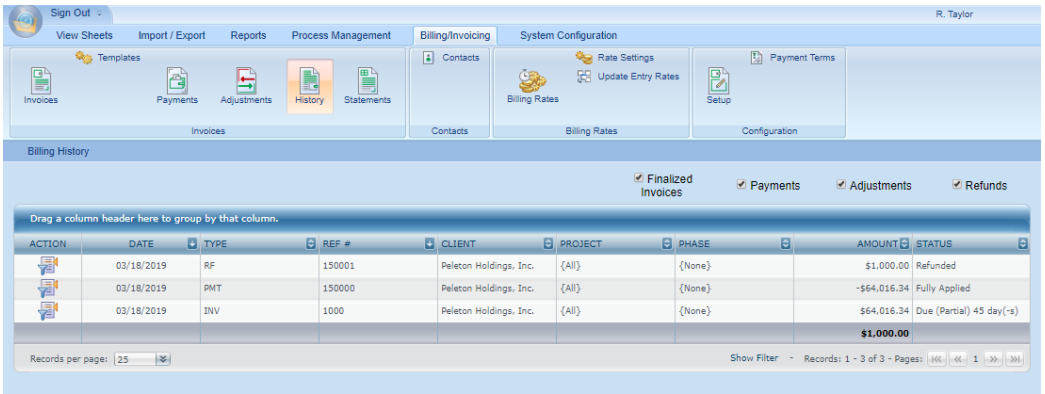
Office Timesheets Time Billing module also tracks invoice adjustments, including both **balance adjustments (Debit and Credits)** and **refunds**.





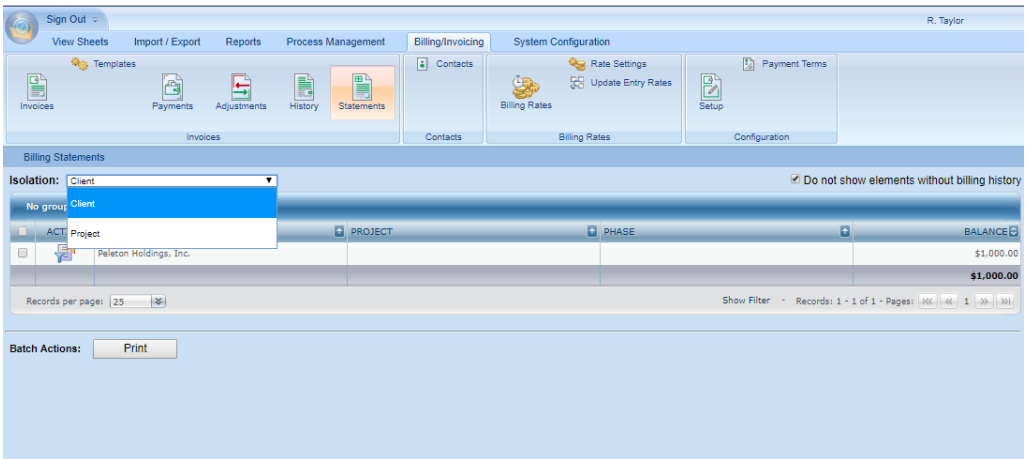
Invoice History Tracking

Office Timesheets Time Billing Edition's History Grid contains all invoice transactions that justify the balance for a given range of invoices. It helps you to quickly identify and review a detailed list of all activities pertaining to one or more invoices including all payments, credit/debit memos, and refunds.



Customer, Project and Phase-based Statement Generation

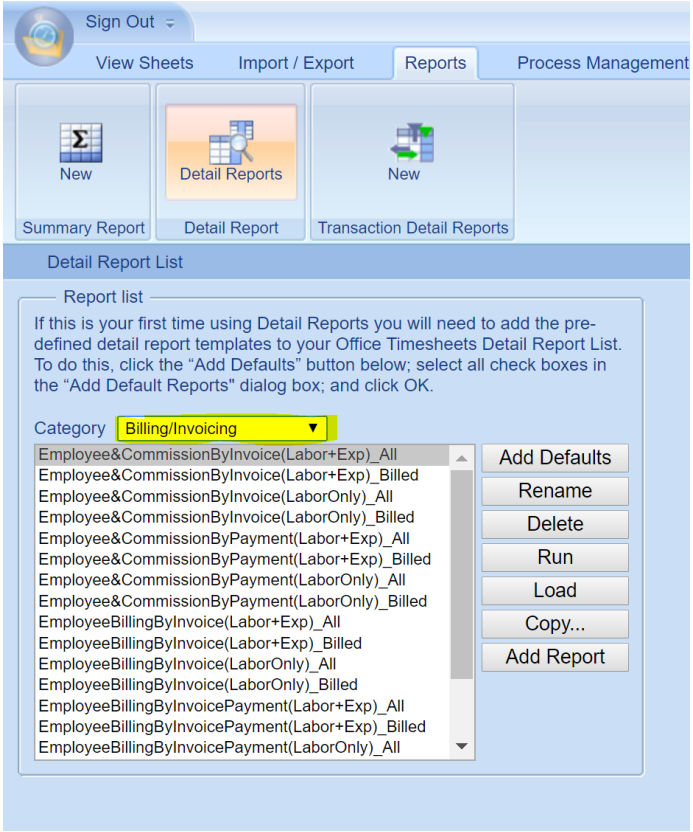
From Office Timesheet Billing Edition's Statements area you can generate a statement for each isolated Client, Project and/or Phase by clicking on the Action icon for the specified Client's/Project's/Phase's grid row, and clicking **View Client/View Project or View Phase**.



New Time Billing Detail Reports

Office Timesheets Detail Reports now includes a robust number of new report templates designed to complement Time Billing needs. The reports include, but are not limited to:

- Invoice Aging Report
- Invoice Tax Report
- Invoice Summary Report
- Multiple Timekeeper Billing Productivity Reports


Sign Out
View Sheets
Import / Export
Reports
Process Management
New
Summary Report
Detail Reports
Detail Report
New
Transaction Detail Reports
Detail Report List
Report list
If this is your first time using Detail Reports you will need to add the pre-defined detail report templates to your Office Timesheets Detail Report List. To do this, click the “Add Defaults” button below; select all check boxes in the “Add Default Reports" dialog box; and click OK.
Category
Billing/Invoicing
Employee&CommissionByInvoice(Labor+Exp)_All
Employee&CommissionByInvoice(Labor+Exp)_Billed
Employee&CommissionByInvoice(LaborOnly)_All
Employee&CommissionByInvoice(LaborOnly)_Billed
Employee&CommissionByPayment(Labor+Exp)_All
Employee&CommissionByPayment(Labor+Exp)_Billed
Employee&CommissionByPayment(LaborOnly)_All
Employee&CommissionByPayment(LaborOnly)_Billed
EmployeeBillingByInvoice(Labor+Exp)_All
EmployeeBillingByInvoice(Labor+Exp)_Billed
EmployeeBillingByInvoice(LaborOnly)_All
EmployeeBillingByInvoice(LaborOnly)_Billed
EmployeeBillingByInvoicePayment(Labor+Exp)_All
EmployeeBillingByInvoicePayment(Labor+Exp)_Billed
EmployeeBillingByInvoicePayment(LaborOnly)_All
Add Defaults
Rename
Delete
Run
Load
Copy...
Add Report