



Timeslips Go

Step-by-step setup guide

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Purpose

This guide will walk you through the steps of setting up your new Sage Timeslips Go account, from activation to syncing data with Sage Timeslips Premium. Sage Timeslips Go is the new cloud-based solution that replaces Sage Timeslips eCenter. Follow the instructions below for a smooth setup.

Prerequisites

1. These steps must be performed by the Sage Timeslips Admin in your firm.
 2. You must download and install the most recent version of Sage Timeslips Premium (30.0.7.149). Use the following link to download the Sage Timeslips Premium release. [Download now](#).
 3. As a new user, you should have received an activation onboarding email containing a link to set up your Sage Timeslips Go login. If you have not received this email, please contact Timeslips support using the **CHAT** function within Sage Timeslips Premium.
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Setup Sage Timeslips Go logins

Locate your Sage Timeslips Go activation email:

- Find the Sage Timeslips Go activation email sent by Sage Solutions Administrator.
- Log out of **SageID**:
- Before clicking on any link, **ensure you are logged out of any SageID product**. Log out if needed.

Activate your Sage Timeslips Go service:

- In the Sage Timeslips Go activation email, click the Getting Started button. This will open your default browser.
- You should see a **Create Your Account** screen.
- Your email address will be pre-filled. Fill in the remaining fields with correct details and click **Sign Up**.

Verify your email:

You will receive a 6-digit verification code via email. Copy-paste the code into the browser and click Continue.

Enable Two-Factor Authentication (2FA)

Choose your 2FA method:

You will need to set up a second layer of security. Choose a 3rd-party authenticator like Microsoft, Google, or Authy. Alternatively, you can opt for text-based verification.

Use Authenticator App (Example: Microsoft):

In the Microsoft Authenticator app, click the + icon to add an account, select **Other Account**.

- Use the app to scan **the QR code** shown in the browser.
- Enter the 6-digit code from the Microsoft Authenticator and click **Continue**.

Save your recovery code:

After successful authentication, a recovery code will be provided. Save it in a secure location as it is used to recover access in case of device loss or changes in phone numbers.

Complete setup:

Once completed, you should be automatically logged into Sage Timeslips Go. If not, return to the activation email and click **Get Started** again to log in with your email and password.

Navigate the Sage Timeslips Go workspace

Once logged in, the **Sage Timeslips Go app** should open.

At the top-right, click on your initials and view the **Menu** of additional options, such as **User Management, Go Desktop Link,** and **Security**.

Admin login: As the first login, your account is considered an **Administrator**. You can modify settings for user management and security.

Set up user management and permissions in Sage Timeslips Go

Create New User:

- In the **User Management** section, click **Create User**.
- Enter the user's email address, name, and level of access (i.e., Timeslips Go access).
- If you don't want the user to have access to user management, leave the User Management box unchecked. Click Invite to create the user.

Define Administrators for Sage Timeslips Go:

- In **User Management**, select **Options > Select Administrators**.
- Here, you can assign or remove administrator rights. **Mark the checkbox next to a user's name** to grant them admin privileges or uncheck it to revoke.
- Note: It may take up to 2 minutes for admin settings to take effect. If they don't, contact Timeslips Go Support.

Link Sage Timeslips Go to Sage Timeslips Premium

Check for updates in Sage Timeslips Premium:

- Ensure your **Timeslips Premium** is up to date. In **Sage Timeslips Premium**, go to **Help > Support > Downloads and Updates**.
- If not updated, download and install the latest update.

Log into Sage Timeslips Premium:

- In **Sage Timeslips Premium**, navigate to **Special > Sage Timeslips Go**.
- The new **Sage Timeslips Go** dashboard is now visible.

Link Sage Timeslips Premium to Sage Timeslips Go:

- In **Sage Timeslips Go**, click on your initials in the upper right corner.
- Click on **Go Desktop Link** and copy the token displayed.
- **Paste the token from Sage Timeslips Go into Sage Timeslips Premium** and click **Save** and **Test Connection**.

Sync data:

Once the connection is successful, click **Done**. Your Sage Timeslips Go dashboard will display your synced data.

Sync Timeslips Data

Link logins to Timekeepers:

- In **Sage Timeslips Premium**, navigate to **Names > Timekeeper Info**.
- Find the desired timekeeper and enter their Sage Timeslips Go login email address under Sage Timeslips Go Email. Click **Save**.

Refresh Sage Timeslips Go dashboard:

- Click the **Refresh** button in the top right corner. You will now see your linked logins with an up arrow, indicating that a sync is needed.
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Upload your database

Complete first sync:

- In the **Sage Timeslips Go** dashboard, navigate to the **Transfer menu**. Leave **Update Names and Settings** checked.
- Once ready, click **Transfer**. You will see a report summary of the items to be synced process.
- Click **Yes** to begin syncing your database. This may take several minutes depending on the size of your data.

Confirm sync:

Once the sync is complete, click OK.

Manage time entries

Create and save a Timeslip:

- In **Sage Timeslips Go**, create a new timeslip by clicking the **Plus Icon** in the top right corner.
- Select the **client**, and **task**. The synced names from Sage Timeslips Premium should now appear.
- **Save** the timeslip. The list will automatically update, showing the new slip.

Sync Timeslips back to Sage Timeslips Premium:

- In **Sage Timeslips Premium**, navigate to **Special>Timeslips Go**.
 - In the **Sage Timeslips Go** menu, select the appropriate **Download Slips** radio button and then press **Transfer** to download the newly created slip.
 - **Refresh** the Sage Timeslips Go dashboard to view the updated sync status.
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Get help

If you have further questions or encounter issues, please contact **Sage Timeslips Support** using the **Sage Support link** in Sage Timeslips Go for assistance.