RELEASE NOTES · EVERTIME CRM

Timesheet Method by Client and Booking

Release: v26.4.17 · Date: 21/10/2026 · Area: Bookings and Evertime Pay & Bill integration

What's new

You can now choose the Evertime Pay & Bill **Timesheet Method** (Online or Manual) for each client and for each booking, instead of one setting for your whole agency. Your agency setting is kept as the default.

Why we made this change

Until now, one agency-level Timesheet Method applied to every booking, so you could not have some placements with online timesheets and others added manually. This release gives you that flexibility, while keeping your existing setup working as before.

New and improved

1. Client default Timesheet Method

- New **Timesheet Method** field on **Client > Details**, with the options Online and Manual.
- If a client does not have a method set, its bookings follow your agency setting until you choose Online or Manual for that client.

2. Timesheet Method on Add Booking

- New mandatory **Timesheet Method** field under **Additional Details** in the Add Booking window.
- When the window opens, it shows your agency default. When you select a client, it changes to that client's method, or stays on your agency default if the client has no method set.
- You can still choose a different method for an individual booking before saving.

3. New Change Timesheet Method action

- New action in **Booking Plan > Actions > Change Timesheet Method** to switch an existing booking between Online and Manual.
- The booking start and end dates are shown for reference. The change applies to the whole booking.

4. Visibility and logging

- **View Booking Insights** now shows the booking's Timesheet Method.
- **View Booking Log** includes a new "Change Timesheet Method" log type, recording the consultant, client, candidate, old and new method, user, and date and time.
- The change also appears in **Candidate > Notes** when you click **Show Logs**.
- Each Timesheet Method field has an ⓘ tooltip with a **Read more** link to the Knowledge Hub.

How it works with Evertime Pay & Bill

- The booking's Timesheet Method is sent to Evertime Pay & Bill in the Combi CSV on every line for the booking, and each weekly placement is set to that method on import (manual upload or Auto-FTP).
- If you change the method on an existing booking, the new value is sent in the next Combi.
- Order used: the booking's method, then the client default, then the agency default.
- Only Online and Manual are available in this release.

What stays the same

- Your agency default (Manage Integrations > Settings > Evertime Default Timesheet Method) still applies to any client that does not have its own Timesheet Method.
- Existing bookings keep sending the same Timesheet Method as before until you change them.

- Other booking details, such as rates, dates and AWR Offset, are not affected when you change the Timesheet Method.
- All existing Booking Plan actions work as before.

Who it's for

Available to Evertime, Intime and Direct agency users who can add or edit bookings. Users who can edit client details can set the client default.

What you need to do

1. Check your agency default in **Manage Integrations > Settings > Evertime Default Timesheet Method**.
2. For clients that need a different method, set it on **Client > Details > Timesheet Method**.
3. When adding bookings, check the Timesheet Method after selecting the client.

No action is needed if you want to keep using one method for everything.

Learn more

- Knowledge Hub: Timesheet Method (Add Booking) https://hub.centricflow.co.uk/knowledge-base/bookings/timesheet-method-add-booking/
- Knowledge Hub: Change Timesheet Method (Booking Plan) https://hub.centricflow.co.uk/knowledge-base/bookings/change-timesheet-method-booking-plan/
- Questions? Contact Support at support@evertime.co.uk.