

Another New Feature? TimeSolv Helps You Manage Client Documents

Documents, documents, and more documents. Such is the reality of legal practice. If you've logged into TimeSolv lately, you may have noticed a new feature that allows you to conveniently upload, maintain and edit all of those client documents straight from the user-friendly TimeSolv platform.

Here's How it Works

Once you choose the "Documents" tab, you will see a complete listing of your client matters. To narrow it down, use the search feature to quickly locate the client you need to access. Once you've identified the client and the matter, you will see an option to add new folders and documents. Let's say you want to create an intake Folder, just choose the "New Folder" button and name it "Intake". The program even allows you to create subfolders within subfolders... whatever it takes to keep you and your practice organized.

To upload documents within your "Intake" folder, click on "New Document" and choose the file you want to add. You can choose various file formats, including a Word document, an Excel file, and even a PowerPoint. There's a description field available for a quick explanation of the file, which can be extremely convenient if multiple members of your practice are accessing the same client matter. As the document is changed, you can create new versions by either uploading a brand new version or simply editing the original uploaded version.

When you're ready to view the document, you can access it through the "Documents" tab or the "Client and Matters" tab. By hovering over the

magnifying glass icon, you automatically see the document. You can choose to download, print, or open it in a new window.

This is just one of the many time-saving features of TimeSolv legal billing software. The TimeSolv team works very hard to streamline your administrative tasks, making them more efficient and accurate. A explanatory video of the document management feature is available [here](#). If you want to learn about all that TimeSolv has to offer, click [here](#) for a free, no obligation trial.

About Erika Winston:

Erika Winston is a freelance writer with a passion for law. Through her business, The Legal Writing Studio, she helps legal professionals deliver effective written messages. Erika is a regular contributor to [TimeSolv](#) and a variety of other publications.