

Tip of the Week: How to Change the Invoice Settings at the Firm, Client, Matter and Invoice Level

Invoices serve as an itemized list of work done for the client, and details on what they owe you, which is why the detail should be as clear and concise as possible to avoid client disputes and delayed payments.

That's why it's essential you have your invoice settings in place to ensure you have all the required details best suited to your business needs and client type.

TimeSolv's flexibility means that any settings made at the firm level can be modified at the client level, then down to the matter level and again at the specific invoice level if needed.

We have listed below how to set up or change the invoice settings at the Firm level, Client level, or at the Matter level.

To access invoice settings at the firm level, select Settings under the Clients tab and then Invoice Settings.

You have multiple options here:

On this page, you will define firm-wide the defaults on your invoice settings. Every new client and matter you create will adopt these settings unless you override them at the Client or Matter level in TimeSolv.

Your setting defaults allow choosing the billing template you'd like to use, if you'll be charging interest, along with your payment terms.

You'll also set your default invoice delivery method and the various invoice narratives that can appear on different areas of the invoice.

The beauty of TimeSolv is you can always modify and customize these settings as needed at the Client and Matter level. When viewing both your clients and matters, you'll see the same Invoice Settings tab where you can make your modifications.

You also have one last chance to modify the settings at the individual invoice level before you send your bill. When viewing your list of draft invoices, click on the dollar amount of the invoice and you'll be able to modify your template, delivery method, and narratives, among other things, before sending the final invoice.

If you'd like more help with the invoice settings or any tools, please call us at 1.800.715.1284, email us at support@timesolv.com or Contact support.

[Contact support](#)