

More improvements to TimeSolv

New improvements to TimeSolv to help you perform your work more efficiently.

Client Portal Improvements

Now the Client Portal displays descriptions for time and expense entries to provide your client a better understanding of what has been included on previous bills and what is yet to be billed. In addition, you can search and sort the information displayed in these areas to provide your client greater accessibility to activity on their account.

The ability to resend an email to your client providing them Client Portal access has been added to the Edit Contact page. You are now easily able to provide portal access to your clients when they misplace their login credentials.

Search Contacts More Effectively

The search criteria field in the Contacts list now has increased capabilities. Along with being able to search for contacts based on their name, address, or email, you can now search based on the client they are associated with. Just enter all or part of the client name in the search criteria box for a list of all contacts associated with the client or any matters under that client.

Invoice Email delivery to clients

The email delivery process for invoices, statements, and retainer invoices has been refined. When an email address is included in multiple locations for either sending or receiving, only a single email will be delivered. This will reduce the volume of emails received while ensuring all intended recipients receive the required emails.