

Tip of the Week: Ability to Copy a Matter

When you work repeatedly for a Client, you're often working on the same type of Matters for them. As such, the same Tasks Codes are needed, the same Timekeepers are assigned, same Contacts, same Billing, etc. Rather than having to re-enter all of those setup details – TimeSolv now allows you to clone an existing Matter so that all the details connected to that Matter are created automatically in the new Matter. These can be edited as needed. This week's Tip of the Week will show you how to copy a Matter.

Users can copy a Matter to the same Client or to another Client. To get started, click under **Clients>Clients & Matters>Matter you want to clone**.

On the top right is a '**Copy Matter**' button. Click on that to display the pop-up that allows you to select the following configurations to be copied:

- All
- General
- Originators
- Contacts
- Invoice Settings
- Team
- Matter Plan
- Budget
- Relationships
- Notes
- Custom Field Groups
- Custom Field Values
- Approver

Matter Details

Auto-Accident - Amber Little

Back Delete Matter **Copy Matter**

General Originators Contacts Invoice Settings Payment Settings Team Matter Plan Budget Invoices Calendar Documents Relationships Trust Notes Custom Fields

Name * Auto-Accident Start Date 2019-02-10

Matter Id 101 - 104

Responsible Timekeeper -

Active? ☒

Billable? ☒

Hold Billing? ☐

Billing Code

Rate By * Matter Rate

Edit Rates

Sub Category -

Copy Matter

Client * Amber Little

Matter Name *

☒ All

☐ Contacts

☐ Matter Plan

☐ Notes

☐ Custom Field Values

☒ General

☒ Invoice Settings

☒ Budget

☒ Approvers

☒ Originators

☒ Team

☒ Relationships

☒ Custom Field Groups

Copy

Copying Matters will save you time in feeding data into a system that's primary purpose is to increase your billable hours. This is why TimeSolv constantly strives to make changes that help your firm become more efficient and profitable. Leave the mundane tasks to the system so you can focus on your actual work.

If you'd like to contact TimeSolv support for help, please call 1.800.715.1284 or [Contact support!](#)

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