

Tip of the Week: Ability to Unlink TimeSolvPay Transactions

In our commitment to making TimeSolv an even more versatile tool for your legal billing and time tracking needs, we're excited to introduce a new enhancement that offers greater flexibility and control over your financial transactions. With this enhancement, you can now unlink TimeSolvPay transactions and associate them with a different client-matter, providing you with a powerful solution to manage your financial data accurately.

Mistakes can happen, and sometimes a payment gets applied to the wrong client-matter. With the new "Unlink" option, you have the flexibility to correct these errors quickly and efficiently, ensuring that your financial records remain accurate and up to date. Whether it's associating a payment with the correct client-matter or making changes to your financial records, this enhancement streamlines the process for you.

How Does It Work?

Unlinking a TimeSolvPay transaction is a simple process:

1. Navigate to the TimeSolvPay>Transactions screen.
2. Locate the transaction that needs to be unlinked.
3. Click on the "Unlink" option.

Transactions

Account

Parker, Carnage & Smith - Oper

Show

All

Matter - Client

Type or double-click for list

From

2023-01-02

To








2023-10-12

Search

Reset

More Options

Export To Excel

Date	Client - Matter	Payment Method	Source	Account	Status	Amount	
2023-10-12	Patent - Baker Chadwick LLC	Credit Card - On File Visa 1111	 TimeSolv - Payments	Operating	Charge	\$225.97	
2023-10-10	Child Care - B. Gaylord & Lesch	Credit Card - Manual Entry Visa 1111	 Website Payment	Operating	Charge	\$3,400.00	 Unlink
2023-10-05	Auto-insurance - Amber Little	Credit Card - On File Visa 1111	 TimeSolv - Charge Invoice	Operating	Charge	\$1,452.09	
2023-09-19	Child Care - B. Gaylord & Lesch	ACH - Manual Entry Bank 3210	Client Portal - Email	Operating	Charge	\$2,000.00	

Once you click “Unlink,” the transaction’s association with the current client-matter is removed, and it returns to an unlinked state. Now, the “Link” option becomes available, allowing you to link the payment to a different client-matter of your choice.

Limitations to Keep in Mind:

It’s important to note that there are some limitations to the “Unlink” feature. You will not be able to unlink transactions in the following scenarios:

1. Transactions that have been allocated to invoices.
2. Transactions that have been fully or partially transferred to a Trust Account.

Additionally, for Trust Transactions, you can only unlink them when doing so will not bring the Trust Account’s allocated balance below zero. The same condition applies when performing transfers from an Operating Account to a Trust Account.

This enhancement provides you with the freedom to manage your financial data efficiently and make corrections when needed, ensuring that your TimeSolv experience remains as smooth and hassle-free as possible. This enhancement will be a valuable addition to your TimeSolv toolbox.