

Tip of the Week: Ability to View and Replenish Trust Accounts

The responsibility that comes with Trust accounting is major for attorneys. There are a lot of rules that need to be followed according to the local state guidelines. That's why it's so important to keep accurate records and comply with those regulations to avoid facing serious issues with clients and the state bar. TimeSolv strives to make your Trust accounting experience with us as seamless as possible. This week's Tip of the Week focuses how TimeSolv help its users determine the Trust replenish amounts easily and quickly.

The Trust replenishment screen can be accessed from **Payments>Replenish**. This gives users access to Trust replenish management by viewing a list of Trust replenish amounts for all Clients and Matters.

There's a **Search** option towards the top of the screen to help users whittle down the list being viewed, as well as an option to **Export to Excel** via a link that allows users to **Download** the listed items in an Excel format.

If replenishment is due for a Client or Matter, a '**Replenish**' link appears in the far far-right column. Clicking on '**Replenish**' will generate a pop-up allowing users to specify the **Payment Method, Amount, Reference,** and **Notes**.

Unfortunately, Trust accounting mistakes are quite common among law firms, but most of these errors can be easily addressed with the right legal billing software. TimeSolv has a robust record-keeping Trust accounting feature that helps law firms best manage their client Trust money. We provide you with the ability to easily keep individual records, along with management of the accounts as a whole.

If you'd like to contact TimeSolv support for help, please call 1.800.715.1284
or Contact support!

[Contact support](#)