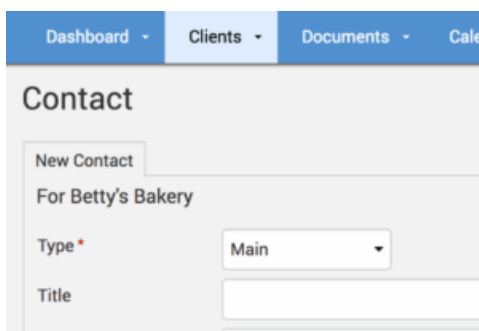


Tip of the Week: Associations on Contacts

When creating contacts under Clients and Matters, you always want to be sure you don't create any duplicates, as this can cause problems with billing. TimeSolv allows users to associate a contact with multiple Clients/Matters so you don't have to create duplicate contacts. For example, if you have the contact 'John Smith' and he should be a contact for two different Clients/Matters, just key in his information once, then associate his contact with both Clients/Matters. This week's Tip of the Week will show you how to set up associations on contacts.

So, let's say Client X's contact is 'John Smith', and John Smith has a lot of Matters. Create John Smith as the main contact for Client X under **Clients>Clients & Matters>[Client name]>Contacts** tab. Add John Smith's details after clicking on '**New Contact**' link and specifying the contact type as '**Main**'.



The screenshot shows a web interface with a top navigation bar containing 'Dashboard', 'Clients', 'Documents', and 'Calendar'. Below this, the 'Contact' form is displayed. It has a tab labeled 'New Contact' and a subtitle 'For Betty's Bakery'. The form contains a 'Type' dropdown menu with 'Main' selected, and a 'Title' text input field.

After saving, you'll see an '**Associate**' link next to the listed contact under the Contacts tab. Select all the relevant Clients/Matters to associate this John Smith contact with, eradicating the need to create any duplicates.

Client Details

← Back

✖ Delete This Client

Betty's Bakery

General

Contacts

Invoice Settings

Matters

Relationships

Notes

Custom Fields

Enter Search Criteria

Associated ▾

Search

Reset

+ New Contact

Last Name	First Name	Office Phone	Email	Address Line1	City	State/Province	Matter Name	Contact Type	
Hudson	Betty	609-786-6911	support@timesolv.com	3143 Watson Street	Camden	NJ	Company Investigation	Other	Edit Associations
Smith	John	256-552-2520	js1401gy1m@meantinc.com	1533 Marcus Street	Decatur	AL		Other	Edit Associations

2 records

If you'd like TimeSolv support for more help in understanding contacts and associations, please call 1.800.715.1284 or [Contact support](#)

[Contact support](#)