

Tip of the Week: Attaching expense receipts and invoicing

Did you know how easy TimeSolv makes tracking expenses and billing your clients accurately? By being able to attach pictures of expense receipts to a matter, you can provide proof of expenses as part of the billing process.

Click on *Expense*>*Expense Entry*. Towards the bottom, you'll see a 'Choose file' button next to the *Receipt* row. There are four file types to choose from, including gif, jpeg, pdf, or png. The maximum allowed file size is 10,000 MBs, which should be plenty to accommodate a receipt.

The screenshot displays the 'Expense Entry' interface. On the left, there is a calendar for April 2022 with a 'Total' column. The main form area includes fields for 'For' (Smith, Rachael), 'Matter', 'Expense Code', 'Quantity', 'Price Per Unit', 'Markup (%)', and 'Description'. A 'Receipt' row at the bottom has a 'Choose file' button highlighted with a red box. Other buttons like 'Save & New' and 'Save & Duplicate' are visible at the bottom right.

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
27	28	29	30	31	1	2	0.00
3	4	5	6	7	8	9	0.00
10	11	12	13	14	15	16	0.00
17	18	19	20	21	22	23	0.00
24	25	26	27	28	29	30	0.00
Month Total - Amount: 0.00							

Once the file is uploaded, it will be listed at the bottom of the screen. A little magnifying glass next to the listed file will allow you to preview a picture of the uploaded receipt, which can be a huge time saver. You can even download a copy, or edit and delete the receipt altogether. If you haven't received the receipt yet, you can come back here and add it later on.

Now, when it comes to attaching the receipt to the invoice, TimeSolv will automatically attach any uploaded receipts by default to help save you time. Create a draft invoice for the expense as you normally would, and find that the picture of the receipt has been attached to the draft invoice when you preview it.

To disable the expense receipts from appearing on invoices, a quick change to the billing template will stop the default attachments. Click on the relevant invoice's dollar amount under *Invoices>Drafts* screen. Then click to *edit* the billing template being used.

<input type="checkbox"/>	Client	Matter	Date	Amount	Status	Split	Printer	Email	AutoMail	
<input type="checkbox"/>	BBC	Patent	2022-03-29	\$1,462.10			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Betty's Bakery	Foreclosure BB	2022-03-29	\$600.00			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Edit Draft

Patent - BBC

Invoice Total: \$1,462.10 Invoice Date: 2022-03-29 Invoice Due Date: 2022-04-28

General

Addresses

Narratives

Time

Expense

Interest

Totals

Commissions

Invoice Date *

2022-03-29

Invoice Period *

2019-03-20

-

2022-03-29

Re: *

Patent

Template *

Flexible Billing Template

Edit

Under the *Expense* tab, uncheck the 'Attach Receipts to Invoice' box.

The screenshot shows the 'Edit Flexible Template' window with the 'Expense' tab selected. The 'Template Name' is 'Flexible Billing Template' and it is 'Active'. The 'Expense' tab is highlighted with a red box. In the 'Include Expense Detail' section, the 'List' dropdown is selected. The 'Section Title' is 'Expenses'. The 'Attach Receipts to Invoice' checkbox is checked and highlighted with a red box. Other options include 'Date', 'Timekeeper', 'Expense Code', 'Unit Price', 'Quantity', 'Description', 'Amount', 'Plan Task To-Do', and 'Show only fields selected above'. The 'Include Expense Summary' section is also visible with options like 'Group By Timekeeper', 'Group By Expense Code', and 'Group By Plan Task To-Do'.

You will no longer have the expense receipts attached to the invoice. TimeSolv constantly strives to help make managing your law firm as efficient and accurate as possible.

If you'd like more help on how to attach expense receipts to entries and invoices, or on how to disable this feature, please call us at 1.800.715.1284, email us at support@timesolv.com or Contact support.

[Contact support](#)