Tip of the Week: Contacts Hierarchies

It's important to understand Contacts in TimeSolv to ensure you are sending your invoices out to the correct places using the correct methods on file. In TimeSolv, there are Matter-level Contacts and Client-level Contacts. Any Client-level Contact will automatically appear under the Matter Contact unless a Matter Contact already exists. If a Matter level contact is created, then the Client contact will not be displayed. This week's Tip of the Week will show you how to create new Contacts, and what each Contact type means for billing purposes.

To create contacts at the Client-level, click on **Clients>Clients & Matters>[client name]>Contacts>New Contact**. This is a useful location to save Contacts if you have the same Contact for all Matters belonging to the one Client.

When saving a new Contact, whether it is under the Client name or the Matter name, the user will get four options regarding the type of Contact being created.

If you have saved a Contact as type 'Main', this Contact will be the one used in invoices, unless you also have an 'Optional Invoice' Contact, which will always supersede a 'Main' Contact. A 'Main' Contact would be, for example, the president of a company. An 'Optional Invoice' Contact would be, for example, the accounting department of that company to where the president wants the invoices to be sent. Any Contacts listed under 'Related Party' or 'Other' are for informational purposes only, and will not appear on an invoice.

So, to summarize, this is the hierarchy in which the invoice will fetch Contact information:

1. Matter Contact > Type 'Optional Invoice'.

2. Matter Contact > Type ‘Main’.
3. Client Contact > Type ‘Optional Invoice’.
4. Client Contact > Type ‘Main’.

If Contact details are missing at any of the above levels, the system will continue to go down the list in that order to fetch the contact details.

If you’d like to contact TimeSolv support for help, please call 1.800.715.1284 or schedule a FREE 30-minute session now!

SCHEDULE MY SESSION