Tip of the Week: Give Your Invoices a Personal Touch with Custom Word Templates

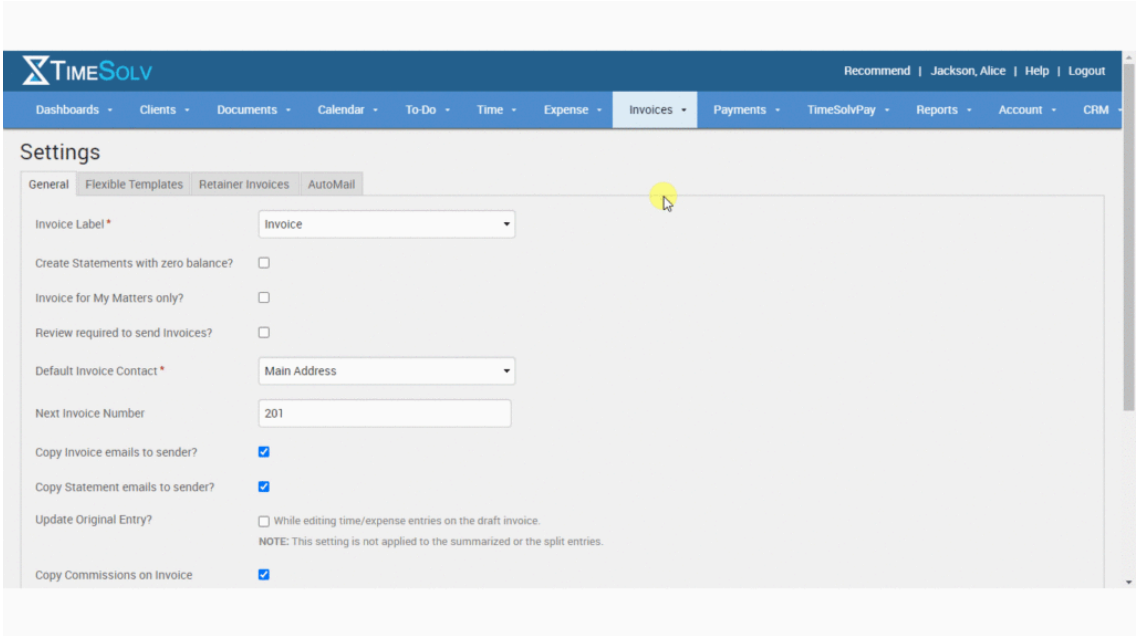
At TimeSolv, we understand the importance of making your client interactions feel personal and professional. That's why we're thrilled to introduce our latest feature – the ability to create custom retainer invoices using Word templates. This enhancement allows you to tailor your retainer invoices to your specific needs and branding, just like you would when adding your personal touch to a handwritten note.

Getting Started: Creating Custom Word Templates

To take advantage of this feature, head over to the "Retainer Invoices" tab on the **Invoices>Settings** screen. Here, you can start building your own custom templates for generating retainer invoices. While we provide a default template for your convenience, you also have the option to upload your customized Word template.

How to Create a Custom Word Template

1. **Download the Sample Word File:** To create your custom retainer invoice template, start by downloading our sample Word file or use your own.
2. **Add Merge Fields:** Customize your template by adding the necessary merge fields. These fields will capture and display dynamic content in your invoice, using values from the client details, matter details, timekeepers, invoices, and more.



Generating Retainer Invoices

Once you've set up your custom Word template, you can easily create retainer invoices by navigation to Invoices>Retainers. Click on the "New Retainer Invoice" link at the top. For more details on all the actions you can perform from under the "Retainer Invoices" screen, click here.

We hope this enhancement provides you with greater flexibility and control over your retainer invoicing process. We're committed to making TimeSolv your go-to legal billing and time tracking solution, and we're excited to see how you'll benefit from these enhancements. Stay tuned for more tips and updates from TimeSolv!