

Tip of the Week: How to Set up AutoMail

Communication with clients is key to maintaining healthy relationships, and our AutoMail feature is just the thing to ensure consistency and efficiency when it comes to sending your bills out. Today's Tip of the Week takes a look at a feature that you probably skip over each time you're on the draft invoices screen. Our AutoMail option is something more firms perhaps should consider.

The lesser-known way to send invoices in TimeSolv is for us to do it for you. What does that mean? Well, with the AutoMail feature, we employ a third-party service that does the folding, inserting, stamping, and mailing at \$1.49 per invoice. We'll mail up to five pages for you, saving you the time and effort. You may find that it's more cost-effective to use our AutoMail service than one of your attorneys or paralegals spending their valuable time with mindless and non-billable work like this.

So let's take a look at how to turn on AutoMail as a default setting. Head under **Clients>Settings>Invoice Settings** tab, and select the **Invoice Delivery Method** as **AutoMail**. Although this will not retroactively change existing Clients-Matters Invoice Settings, this will work for all future Clients and Matters created. You can even turn it on at the individual Client-Matter

level settings by clicking on the Client or the Matter and heading under the

Settings

General Invoice Settings Active Matter Admin Non-B

Default Invoice Settings

Automatically Complete Milestone and Generate Invoices

Default Flexible Template* Flexible Billing Template

Apply Interest? ☐

Interest Type Compound

Payment Terms* Upon Receipt

Payment Terms Text Payment Terms: Upon Recei

Default Invoice Delivery

Printer ☐

Email ☐

AutoMail ☐

Invoice Narratives

Invoice Settings tab.

You can also turn on AutoMail at the draft invoice screen too, which is where most people might find it useful during current COVID-19 work from home conditions. To do this, head under **Invoices>Drafts** screen. After creating your draft invoice, select the Automail checkbox.

Draft Invoices

Enter Search Criteria Responsible Professional All Search Reset

+ New Draft Invoices Download Send Void

| Client | Matter | Date | Amount | Status | Printer | Email | AutoMail |
|----------------------|-----------------------------------|------------|------------|--------|-------------------------------------|-------------------------------------|--------------------------|
| Best Portal Inc | John Vs Doe | 2019-07-17 | \$4,950.00 | Viewed | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Best Portal Inc | John Vs Doe | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Candy's Client | Insurance Claim Split Bill Matter | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Candy's Client | Insurance Claim - 1234523 | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Client on Jun 16 | Law Suit | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Client Smith | Child Custody Matter | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Client Smith | Divorce Matter | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| DB Pro Bono Matters | Test | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| DB Pro Bono Matters | Test | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Dwayne Johnson | Forclosures | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Five Seas Bencorp | General | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| George Delooney Inc. | Multiple Matter | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| George Delooney Inc. | HBO | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Georgia Corporation | A New Idea | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

This AutoMail feature is often overlooked, yet it's staring at you each time you're drafting and sending out invoices. You could say it's hidden in plain sight. This is definitely a feature many firms who still mail their invoices will want to take advantage of.

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

[Contact support](#)