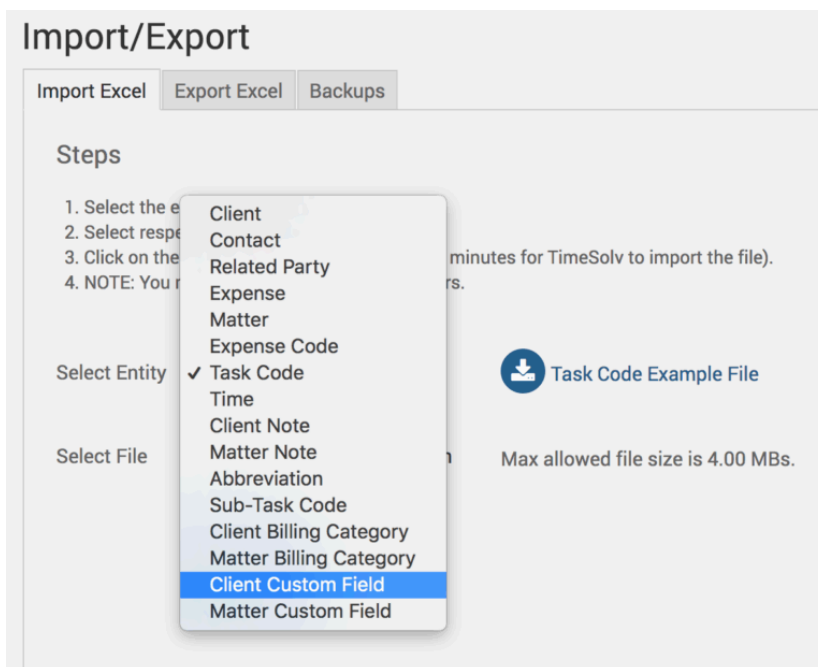


Tip of the Week: Importing Custom Fields

TimeSolv offers the flexibility of creating Custom Fields. These are user-defined fields allowing you to be as creative and intuitive as needed when storing information under Clients, Matters, Contacts, and Matters Groups. What's more, we just rolled out an update allowing users to import Custom Fields for Clients and Matters. This week's Tip of the Week will walk you through how to achieve this.

To set import Client or Matter Custom Fields, click under **Account>Import/Export>Import**.

Select the **import entity** as either **Client Custom Fields** or **Matter Custom Fields**.



Download the 'Example File' which will download an Excel file showing you how the upload file for importing needs to be formatted. As an example, below is the example file for Client Custom Field import.

ClientCustomFields		
<div> <div>HomeInsertDrawPage LayoutFormulasDataReviewView</div> <div> <div>Paste</div> <div> <div>Arial10</div> <div>B I U</div> </div> <div> <div>General</div> <div>\$ %</div> </div> <div> <div>Conditional Formatting</div> <div>Format as Table</div> <div>Cell Styles</div> </div> <div> <div>Insert</div> <div>Delete</div> <div>Forma</div> </div> </div> </div>		
Recover Unsaved Workbooks. We were able to save changes to one or more files. Do you want to recover them?		
Office Update To keep up-to-date with security updates, fixes, and improvements, choose Check for Updates.		
B21		
A	B	C
1	Client Name	Custom Field Name
2	John Smith	ExtraNotes
3	John Smith	ChildrenCount
4	John Smith	MarriageDate
5	ABC Client	CaseDuration
6		
7	Important Notes	
8	Please delete all rows except the first row before adding your data	
9	Existing data will be updated per the import file	
10	Required columns are highlighted in yellow	
11	Client Name	Max of 255 characters long. Must exactly match an existing Client name
12	Custom Field Name	Max of 255 characters long. Must exactly match an existing active Client Custom Field
13	Date Format	Must be YYYY-MM-DD
14	DateTime Format	Must be YYYY-MM-DD HH:mm:ss
15	DateRange and DateTimeRange	Both the From and To values should be separated by a comma. If no comma is specified, it would be considered as one date/datetime value and would be stored in From date/datetime value. Either side of the comma can be empty if the field is not required.
16	Custom Field Value	Must be a valid value as per the data type of the custom field.
17		Empty values would be considered as empty for text, 0 for number/currency and empty for dates and datetimes.
18		A valid option value must be provided in case the custom field is a list. Empty values are not accepted for such custom fields.
19		

Custom fields can provide additional levels of organization and filtration for your business. It also means you can tailor TimeSolv to your specific business needs and Client and Matter demands by adding additional information to the system as needed.

Specific Ways To Remove ALL Friction From Your Firm’s Client Experience

We’ll be hosting a webinar on removing friction from your firm. Your clients experience friction at every step of the process. Maybe they need information immediately, but you don’t respond for 4 hours. Often they’re frustrated by billing, payment process or even the way you communicate with them.

In this webinar the world’s leading experts in law firm billing processes, TimeSolv, we will share data on how law firms are removing friction and getting more leads, more cases, and more satisfied clients. This is a discussion you DO NOT want to miss.

The webinar will be held on June 11th, at 1 PM EDT. Sign up [here](#).

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

[Contact support](#)