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.

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