Tip of the Week: Invoice Narratives

You may consider creating the language that appears on client invoices as not exactly clever work, but it is a necessary burden that can affect how a client perceives you and even your firm. That's why you'll want to make sure the narratives on your invoices are consistent and clear, but flexible when needed. TimeSolv gives you maximum flexibility when it comes time to create the language of your invoice. Narratives can be set either at a firm-wide level, applicable to all clients and matters, or to specific clients or matters.

To set up narratives at a firm-wide level, head under **Clients**>**Settings**>**Invoice Settings**. At the bottom of the page, you can set narratives to be used firm-wide for every client and matter.

To edit any of these narratives for a specific client, please click under **Clients**>**Clients & Matters**>[**client name**]>**Invoice Settings**. Scroll to the bottom of the screen and click on the **Edit Narratives for this Client** button.

You will find all the narrative fields now become available to edit as you wish.

Likewise, to get even more granular and edit narratives for a specific matter, please click under **Clients**>**Clients & Matters**>[**matter name**]>**Invoice Settings**. Scroll to the bottom of the screen and click on the **Edit Narratives for this Matter** button.

- Cover Page Narrative – appears towards the top of the cover page, below matter and client name.
- Invoice Narrative – appears towards the top of the invoice page, below matter name.
- Invoice Footer Text – appears right at the center bottom of the page.
- Invoice Email Message – appears in the email when the invoice email is sent.

- Statement Email Message – appears in the email when the statement email is sent.
- Payment Instructions – appears at the bottom of the remittance page.

Users can also edit narratives after generating draft invoices by clicking on the **Amount** of the draft invoice and clicking on the **Narratives** tab.

Make sure all of these narratives are check marked on your flexible billing templates, otherwise they will not appear on the relevant pages. To do this, go under **Invoice**>**Settings**>**Flexible Templates**.

If you'd like more help with understanding invoice narratives, please call 1.800.715.1284 or Contact support.

Contact support