

Tip of the Week: Manage Active Matters

Do you have a growing list of active matters that's starting to feel overwhelming? TimeSolv's Active Matter Admin feature is here to help you stay organized and efficient. Users can sift through all the active and inactive matters to keep the business organized. Here are some tips to get the most out of this essential tool:

What are Active Matter Admin Settings for?

Active Matter Admin settings allow you to:

- **Identify inactive matters:** Quickly locate matters that haven't seen any activity in a specified timeframe.
- **Clean up your database:** Inactivate redundant matters to declutter your system.
- **Maintain accurate records:** Ensure your matter list reflects your current workload.

How to Use Active Matter Admin Settings:

1. **Access the feature:** Navigate to **Clients > Settings > Active Matter Admin**.
2. **Set your criteria:**
 - **No Time/Expense Entries Since:** Specify a date to filter matters with no recent activity.
 - **Include Matters with a Balance Due:** Choose whether to include matters with outstanding balances in your search results.
3. **Review and inactivate:**
 - Check the boxes next to the matters you want to inactivate.

- Click the **Inactivate** button to complete the process.

By regularly using Active Matter Admin settings, you can:

- **Improve efficiency:** Spend less time searching for information.
- **Enhance accuracy:** Maintain a clean and accurate record of your active matters.
- **Make better decisions:** Gain a clearer picture of your current workload.

By following these tips, you can effectively manage your matters in TimeSolv and improve your firm's overall efficiency.