Tip of the Week: Multiple Flexible Billing Templates for Fixed-fee Invoices

TimeSolv has just rolled out the ability to create multiple Flexible Billing Templates for fixed-fee invoices so that users can generate invoices with varying levels of details. Users can now assign the Flexible Billing Template to both fixed-fee and non-fixed fee invoices. For our existing customers who already have their templates set up, the default “Fixed Fee – Time Only” and “Fixed Fee – Time and Expense” templates will remain the same. This Tip of the Week will walk you through how to create these templates for fixed-free invoices!

Click under Invoices>Settings to access the ‘Flexible Templates’ tab. You’ll see a Flexible Billing Template named ‘Fixed Fee’. Go ahead and ‘copy’ that to create and customize your fixed-fee template as needed.

Flexible Billing Templates allow users to specify exactly what information appears on the invoices. Invoices can include as much or as little detail as required, and company letterhead and logos can easily be incorporated. Our billing templates also allow users to assign different templates to different Matters for the same Client.

Users can customize what to make available on Global Settings, Cover Page, Main Page, Time, Expense, Statement Page, and Remittance Page.

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

Contact Support