

Tip of the Week: Related Parties and Conflicts Search

Conflicts checks are an essential part of protecting clients best interest while protecting them in the most responsible way. Attorneys cannot work with a client if their matter conflicts in interest with another client. This is where technology steps in to make your life easier; enable TimeSolv's conflict checking feature and allow the system to check for any related parties. This week's Tip of the Week will help walk you through how to set up related parties and conduct a conflict check.

Make sure you have conflicts search enabled under **Client>Settings**.

Conflicts & Related Parties	
Enable Conflicts Search?	<input checked="" type="checkbox"/>

Next up, you'll want to specify the different types of relationships you want to track, and the types of related parties. First head under **Clients>Settings>Relationship Types** tab and add relationships, i.e. 'Judge', 'Consultant', 'Defendant', 'Defense Witness', etc.

Then enter under the **'Related Party Types'** under the next tab, such as 'Client', 'Judge', 'Attorney', 'Witness', etc.

Now under the **Clients** drop-down at the top of the screen, you will see a **Related Parties** link has appeared. Click on that to start adding any Related Parties.

Related Parties					+ New Related Party
Enter Search Criteria		Search	Reset		
Company/Last Name	First Name	Type	Katz Related Party Matter Connection	Date	
Duck	Daisy	Witness	Audrey Accountant, Angi Accountant	2018-01-26	Edit
Fiyero	Fiesty	General		2018-01-29	Edit
Jury	Judgen	Judge	Purpose of Custom Title?	2018-01-22	Edit

Click on '**Edit**' next to the newly created Related Parties to create the relationships you need to track right at the bottom of the edit screen. When creating a new relationship you can see that TimeSolv allows you to specify the type of relationship, the sub-type, the associated Client-Matter, and any other extra details you need to associate with this relationship.

Now head under **Client** tab at the top of the screen and click on **Conflict Search** link to enter the name of the person or company, or any other details. Results will show if the associated person is already in the system and what kind of relationship they may have with the Client/Matter.

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

[Contact Support](#)