

Tip of the Week: Conflicts checking

How good are you at tracking conflicts of interest in your practice? TimeSolv can make sure that any conflicts are accounted for by associating related parties to either clients or matters, making it easy to find conflicts before they become an issue. Today's Tip of the Week looks at how to establish related parties and associate them to a client in TimeSolv.

How to enable conflicts search

- Go to the **Clients>>Settings>>General** sub tab
- In the Conflicts & Related Parties section (near the bottom of the page), enable the **Enable Conflicts Search?** check box
- Enter the desired related party custom field label in the **Related Party Custom Field Label** field
- Enter the desired relationship custom label in the **Relationship Custom Label** field
- Click the **Save** button
- Go to the **Clients>>Settings>>Related Party Types** sub tab and click the **Create New Related Party Type** link. Enter the required data and click the **Save** button to save the related party type
- Go to the **Clients>>Settings>>Relationship Types** sub tab and click the **Create New Relationship Type** link to create a new relationship. Enter the required data and click the **Save** button to save the relationship type

How to create a related party

- Go to **Clients>>Related Parties** link and click the **Create New Related Party** link to create a new related party. Enter the required data and click the **Save** button to save the related party
- Go to **Clients>>Related Parties** link and drill into the related party's Company/Last Name. Scroll down to go to the **Relationships** section. Click the **Create New Relationship** link to create a new relationship.

Enter the required information and click the **Save** button to save the new relationship.

How to do conflict search

- Go to the **Clients>>Conflict Search** link to search for conflict of interest.

Note: The conflict search is performed with a new party, such as when a prospect contacts the firm. Enter the name of the new person in the Conflict Search and determine if this person was involved with an existing client, which could result in a conflict of interest.

Support Help

If you'd like TimeSolv support to help you through the process of setting up your related parties and the various levels of customization, call 1.800.715.1284 or Contact support.

[Contact support](#)