Tip of the Week: invoice narratives

So let's be honest. Creating the language that appears on client invoices is not exactly scintillating work. However, it is a necessary burden that can affect how a client perceives you and your firm. So 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 and that's today's tip of the week.

First, you'll want to create your global narrative that will be the default language on your invoices. To set that, head to Client -> Settings and click on the Invoice Narratives tab. You'll see all the options for what appears on the invoice including the cover page narrative, invoice narrative, invoice footer text, the invoice message if sending invoices and statements by email, and finally any payment instructions you want to include.

We understand, however, that there are many times you may want to customize the narratives by client or even matter. You can override the global Invoice Narratives at the client, then matter and even invoice level. To change at the client level, simply chose a client and click on the Invoice Narratives tab and customize to your hearts' content. You'll also notice the same Invoice Narratives tab for all matters as well, any changes there will override the client settings.

You can even customize individual invoices if you chose. When you edit a draft invoice, you'll see the Narratives tab where you can do a final override of anything you've set at the matter, client or global level.

If you'd like more help learning about narratives in TimeSolv, call us at 1.800.715.1284, email us at support@timesolv.com or Contact support.

Contact support