Tip of the Week: New updates to billing template

Our tip of the week today is about some updates we made over the weekend to our billing templates.

Based on feedback from customers on the new statements features we rolled out several weeks ago, we've made some additional updates to the billing templates for even more granular control on the information presented on statements of accounts, whether on invoices or independently generated client statements.

These updates were made over past weekend and our now currently available in the TimeSolv application.

In addition to being able to show the current balance as of the invoice date or the current date, you will also be able to only display a particular section and turn off any of the sections that are not required.

For example, you'll be able to turn on just the balance by matter in a summary format or show the summary of open invoices and credits.

If your clients like to see complete transactional details of all the payments, you can show complete details or details since the last invoice. You can also show details of open invoices and credits at each matter level and even include zero balance invoices and credits.

For a better logical flow, TimeSolv has also moved the option to turn on the trust account to the global settings tab. The setting was previously duplicated on tabs for Global Settings and the Statement of Account Page.

Please call us at 1.888.570.0475 with any questions about how to present statements to your clients or Contact support!

Contact support