Tip of the Week: Options to display matter summaries on invoices

When we released our update November 16 to allow automatic payment of invoices from Trust accounts, we also included Matter summaries on the Statement of Account section of invoices. These Matter summaries show the details of your Trust account, balance due for each matter, invoices, credits, etc. Unfortunately, that also included summaries for Matters with zero balances. The result for some of our clients were bloated statements that many felt were difficult to decipher.

We have since released another update that solves this problem. You now have the option in the billing template to show or hide Matter summaries and whether to include or not include Matters with a zero balance.

The choice is yours.

The only time Matter summaries will appear automatically is when you use the Trust Replenishment feature. In that scenario, only Matters with a balance will appear unless you choose otherwise.

When editing a billing template, click on the Statement of Account Page tab and that's where you can choose if you'd like to include Matter summaries and Matters with zero balances.

You can also select the Remittance Page tab and determine if you'd like to include the Matter summary on your remittance page as well.

If you'd like more help with these options, call us at 1.800.715.1284, email us at support@timesolv.com or Contact support.

Contact support