

Update on New Trust Accounting

We have received several customers' unhappy comments on usability of the latest update to trust accounting. Since we are dedicated to keeping you happy, we have developed an expedited plan to address their issues. We are planning to have the following update early next week.

- Need a convenient option to know how much needs to be transferred to the operating account

- *Potential Resolution: Provide an option similar to Allocate and an Allocatable filter on the payments tab to transfer to operating account while paying invoices.*

- Easy to see balances available by client

- *Potential Resolution: Provide an option to just show balances by client and matter*

- Not allow for negative balances

- *Resolution: Not allow for the balance to go negative when fund are transferred out of the trust account*

- View trust transactions in Client Transaction Log

- *Resolution: Provide an option to include trust transactions on client transaction report*

What to do until these issues are resolved

- How much to transfer and how to Allocate
 - Run the accounts receivables report to see amount due and compare it to the balance available in trust for each client either on screen or by running the Trust Bank Accounts report. Transfer the lesser of the two amounts.

- Allocation is done the same way as before on the payments tab.

Please contact TimeSolv support at support@timesolv.com if you need help. We are extremely sorry for any inconvenience.