ACTIVE PRACTICE

20 Hidden Treasures in Time Matters

By Wells H. Anderson **2011-11-11**

Note: Click on any topic to go to it. Other links are live, too.

Audit Log

Correct mistakes

Main Menu | File | Utilities | Audit Log

Filter the Audit Log by User and/or Date using the Binoculars icon

Check Timer Entries

Event Record | File | Record Properties | Audit

Start and Stop times can assist you in adjusting the billable time for an Event if you overlooked turning the Timer on or off.

Automatic Reminders and Alarms in Event Codes

Avoid clogging up the Reminders entries

Main Menu | File | Setup | Codes | Event

Clear the Reminders field for each Code except for important one for which you need an advance Heads Up.

Set a default Alarm for 10 minutes

In the same window, set the Alarm Min. to 10. You will get a pop-up reminder for this type of Event. But be sure everyone want these pop-ups!

Non-Client Contacts and Matters

Create a type of Contact named “Subject”

Time Matters can become an electronic file cabinet. Use some Contacts “file drawers” (Topics).
Go to: Main Menu | File | Setup | Codes | Classification Codes | Contact
Create a Code: **SUBJ**. Then add Contacts using this code, such as Legal Forms, Taxes, …

Create a type of Matter classified as “Topic”

You can subdivide your Subjects creating a Matter for each Topic within the a Subject. For example, within Legal Forms you could have Real Estate Form, Corporate Forms, IP Forms, …. Each of these Matters would use the **TOP** Classification Code.

Choose Columns for Form Tabs

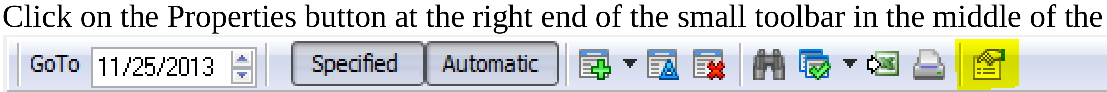
See the most useful information on the Matter Form tabs

Each Matter Form has tabs for Notes, Documents, Phone, Email, Billing and more. Here is where you select the columns of information to show for these records that are related to the Matter.

The changes you make will be effective for **all users** of Time Matters when they login after you make the changes.

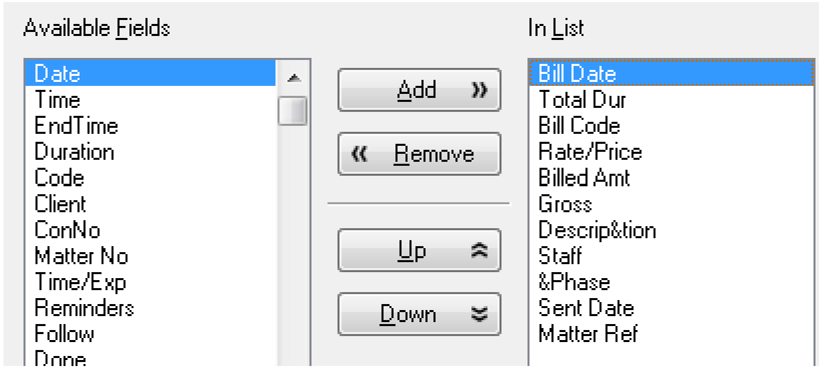
To select columns for Form Tabs:

1. Open any Matter Form.
2. Click on the Properties button at the right end of the small toolbar in the middle of the Form.



3. Click on **List.**
4. Click on **Edit List Layout.**

5. Use the **Add** and **Remove** buttons to choose the columns listed in the right pane.



Billing Tab Columns

If you use Billing Matters or a billing program linked to Time Matters, such as Timeslips or Tabs3, the Billing records you enter in Time Matters are displayed on the **Billing** tab of the Matter Form.

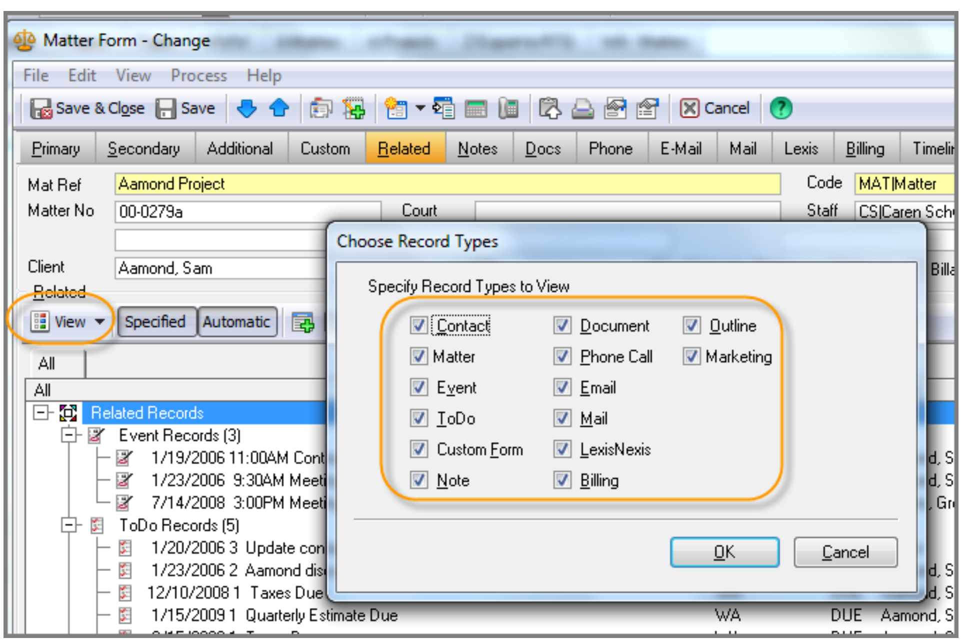
The default selection of columns on the **Billing tab** should be changed because they are a bit deceiving. They show the **Date** column, but **Date** is not the Date of Service. It is the date the record was entered.

We recommend you select the fields shown in the screenshot, above.

Use the Related Tab

See all related records: Events, ToDo's, Contacts, Matters, Notes, Documents…

Open a Matter.
Click on the **Related** tab.
Click on the **View** button.
Check all the boxes for **Record Types to View**.

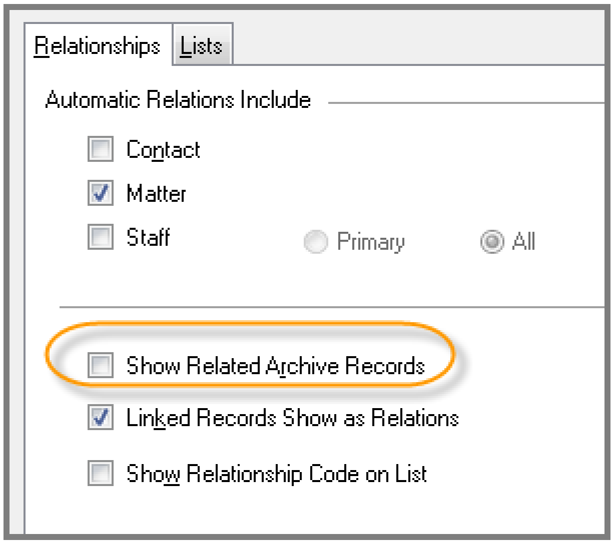


All records related to the Matter are displayed, including Events, ToDo's, etc.

Show both normal and Archive records on the Related Tab

On the Related tab, click on the **Options** button on the middle toolbar.

Check the box: **Show Related Archive Records** (See below.)



Show Linked Records on the Related Tab

Forms in Time Matters can have fields with Lookup Buttons that link to other records. For example, you may have an Opposing Attorney field that links to the Contact list. It makes sense to show these linked people on the Related tab.

To show linked records on the Related tab:

Click on the **Related** tab of any Form.
Click on the **Options** button on the middle toolbar.
Check the box **Linked Records Show as Relations**.

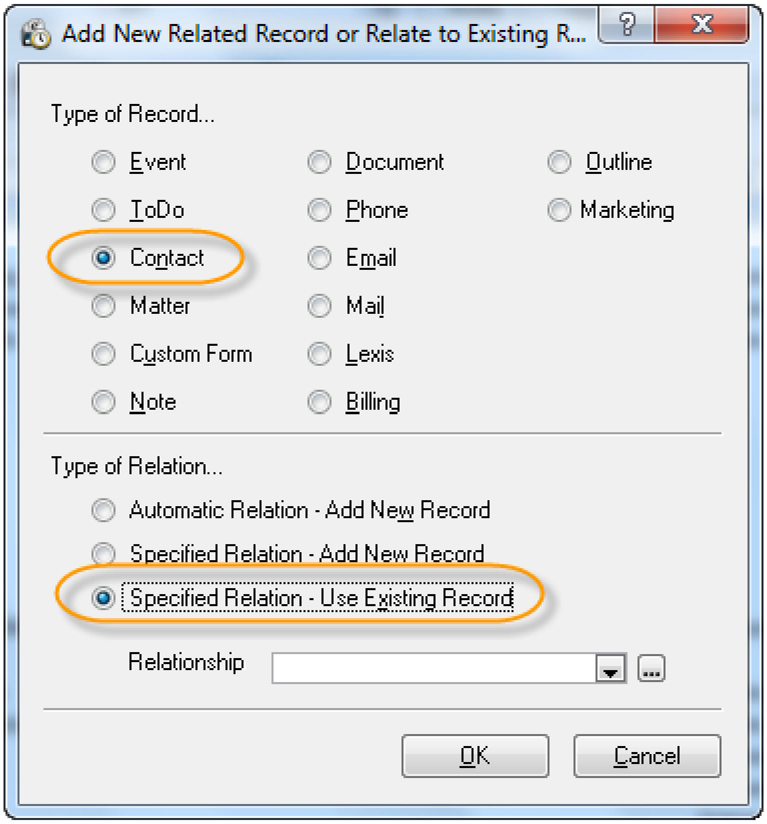
Link Anyone to a Matter

You do not always have enough fields on a Matter record to handle everyone involved in a Matter. Use Specified Relations to link additional people to a Matter.

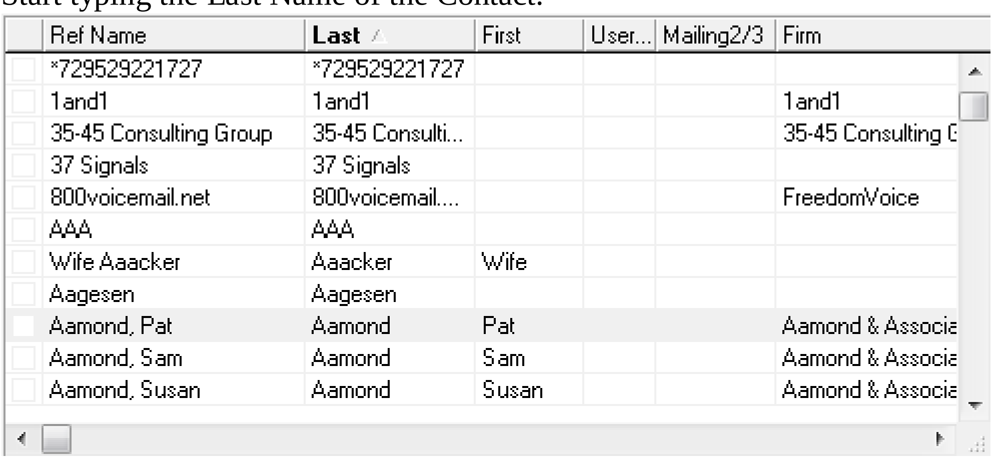
To link anyone to a Matter:

Go to the Related tab of a Matter.
Click the **Add** button on the middle toolbar.

Select: **Contact**. Select: **Specified Relation – Use Existing Record**. Press **OK**.



Start typing the Last Name of the Contact.



Ref Name	Last	First	User...	Mailing2/3	Firm
*729529221727	*729529221727				
1and1	1and1				1and1
35-45 Consulting Group	35-45 Consulti...				35-45 Consulting G
37 Signals	37 Signals				
800voicemail.net	800voicemail....				FreedomVoice
AAA	AAA				
Wife Aaacker	Aaacker	Wife			
Aagesen	Aagesen				
Aamond, Pat	Aamond	Pat			Aamond & Associa
Aamond, Sam	Aamond	Sam			Aamond & Associa
Aamond, Susan	Aamond	Susan			Aamond & Associa

Double-click on the Contact to link it.

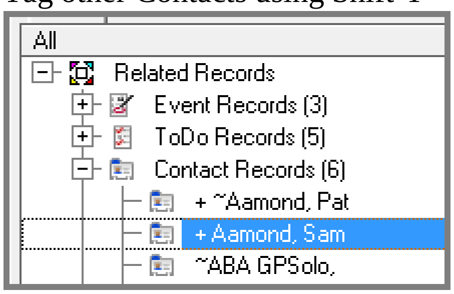
The Contact will appear on the Related tab preceded by a tilde, e.g. ~Aamond, Pat

Copy and Paste Addresses for Linked Contacts

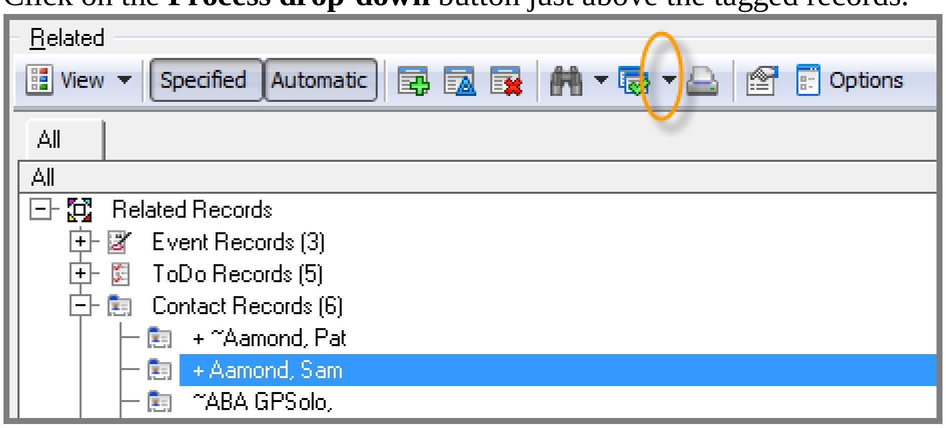
From the Related tab on a Matter, you can copy addresses and paste them into a Document using the Formattable Clipboard.

To copy addresses:

Go to the Related tab on a Matter.
Click on a Contact.
Press: Shift-T Notice that the Contact is now Tagged as shown by a plus sign: +Aamond, Pat
Tag other Contacts using Shift-T



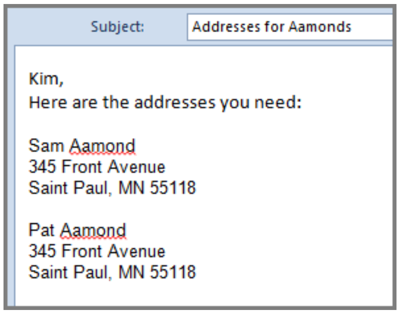
Click on the **Process drop-down** button just above the tagged records.



Select: **Copy to Clipboard.** Click **OK**
Choose: **Standard Label or Envelope**
The addresses are now in the invisible Windows Clipboard.

To paste the addresses:

Go to a document or e-mail.
Press the **Paste** button or shortcut key (Ctrl-V).



Turn Following On or Off

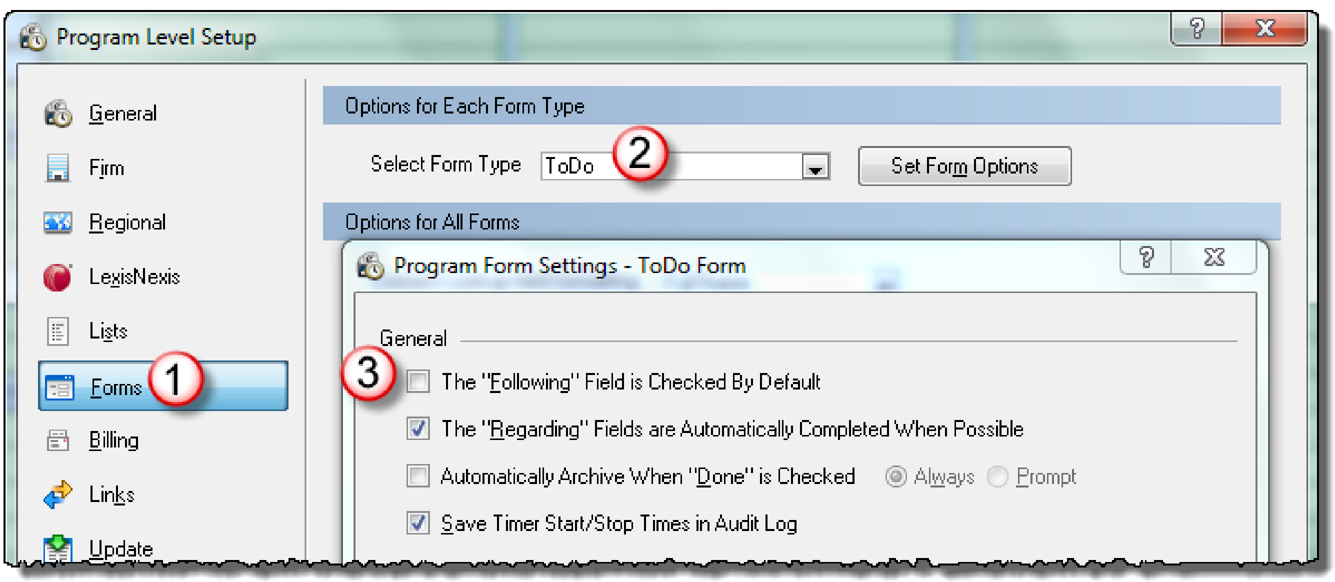
I am not a big fan of the Following feature in Time Matters. Every day it changes the Date of records with the Follow field checked. Used sparingly, the feature has its place. But if too many records are checked, the number of ToDo's or Events dated Today can become overwhelming.

There are two places where the Following feature can be set to operate automatically and one place where it may be disabled entirely.

Program Level Following Setting

To turn Following on or off for all records of one kind, go to:
Main Menu | File | Setup | General | Program Level

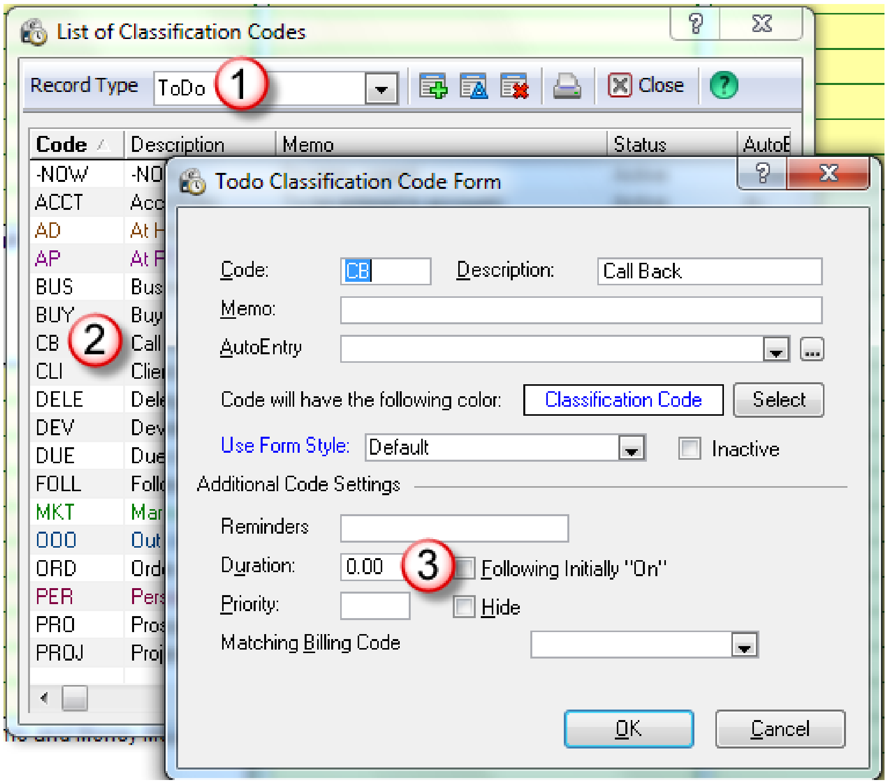
Next go to:



Classification Code Following Setting

To turn Following on or off for all records with a particular Classification Code, go to:

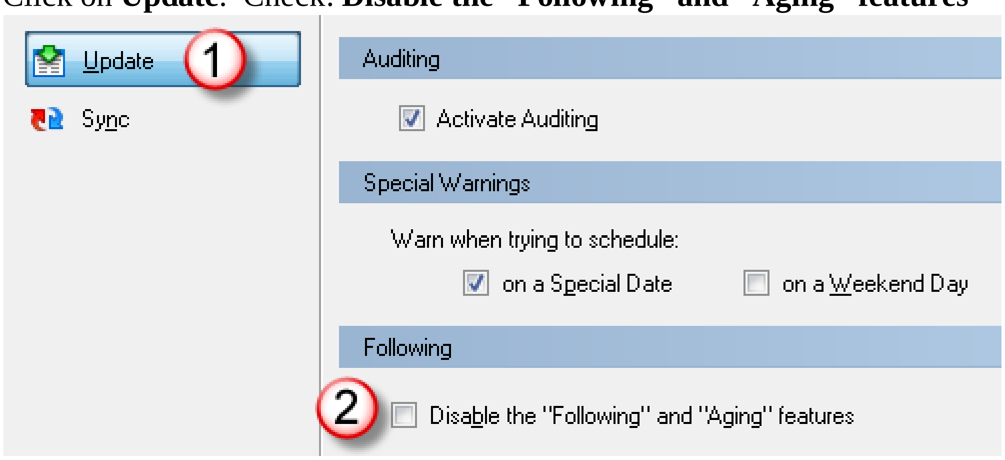
Main Menu | File | Setup | Codes | Classification Codes
Select a Classification Code and change the Following setting. See below.



Disabling the Following Feature

Disabling the Following feature is not recommended. It will also disable the Aging feature of Billing Matters. You can use the Following feature sparingly or not at through use of the settings described above. But if you do not use Billing Matters and do not want to use the Following feature, here is where you disable it:

Go to: Main Menu | File | Setup | General | Program Level
Click on **Update**. Check: **Disable the "Following" and "Aging" features**



Faxing from Time Matters via MaxEmail

Big time savings sending outgoing faxes

Why bother with the fuss of printing documents and feeding them into a fax machine? You can send faxes directly from Time Matters or from MS Outlook *without* a fax machine or even a fax line.

One of the biggest drawbacks of using any fax software is that it requires an available outside telephone line and ties up that line when sending or receiving faxes. Because it is dependent on the telephone line, fax software can only receive one fax at a time. Using a separate fax software product often requires that you maintain a separate address book with duplicates of the names addresses and fax numbers already saved in Time Matters.

MaxEmail (http://www.maxemail.com) is a $24 per year service that sends and receives faxes via e-mail. It has several advantages:

- MaxEmail is less expensive that other fax-via-e-mail services
- Send faxes without going to a fax machine
- Use one program instead for both e-mails and faxes
- Phone lines are not needed or tied up
- Send multiple documents easily
- Link outgoing and incoming faxes to Clients and Matters in Time Matters
- Everyone in the office can send and receive faxes without leaving his or her desk.

(Note: I have no relationship with the makers of MaxEmail other than that of satisfied customer.)

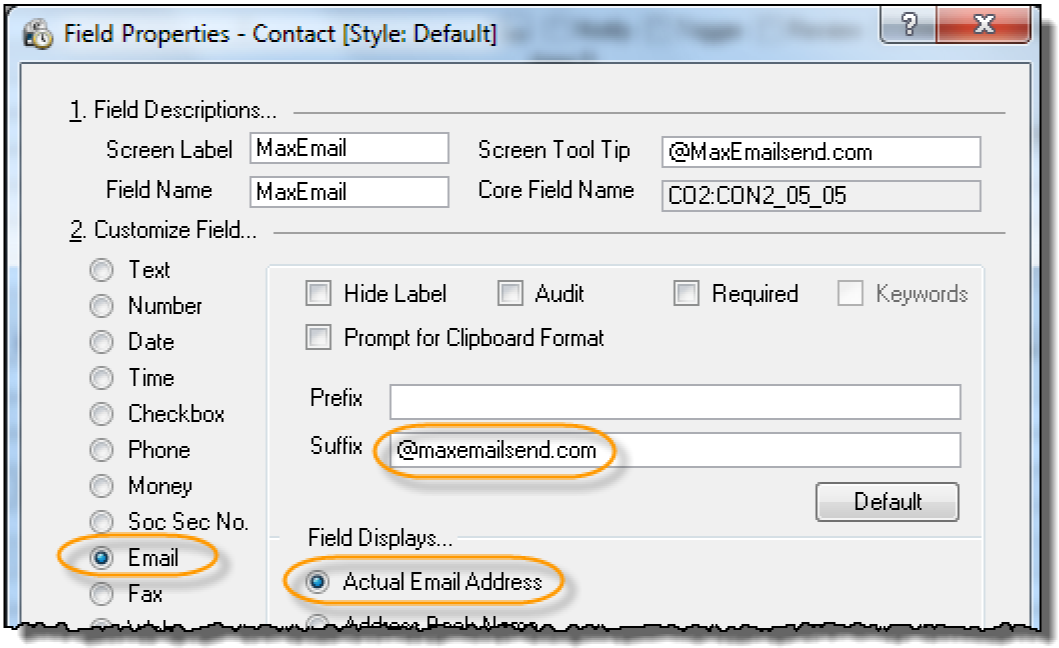
For more detailed information, see: http://www.activepractice.com/articles/faxes-via-email.html

Set up Time Matters to send faxes via TM Email

You can start a fax from a Time Matters Contact record with one click and send it out via TM Email. You need to have TM Email set up and a MaxEmail account ($2 per month – see above).

Customize a Contact field to send a fax:

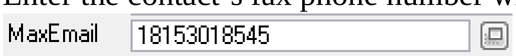
Right-click on an unused field. (Note: Take care if you use Time Matters Form Styles or have purchased a Features Package that customizes Contact Forms. It is best to work with a consultant.)
Select: **Email**. Select: **Actual Email Address**
In the **Suffix** field, enter: **@maxemailsend.com**



Change the **Screen Label** and **Field Name** to MaxEmail

To use this new field:

Enter the contact's fax phone number with a 1 at the front and no punctuation:



The entry in the field should look like: **18153018545**

Now you can click the button to open a TM Email that will be delivered to the recipient's fax number.

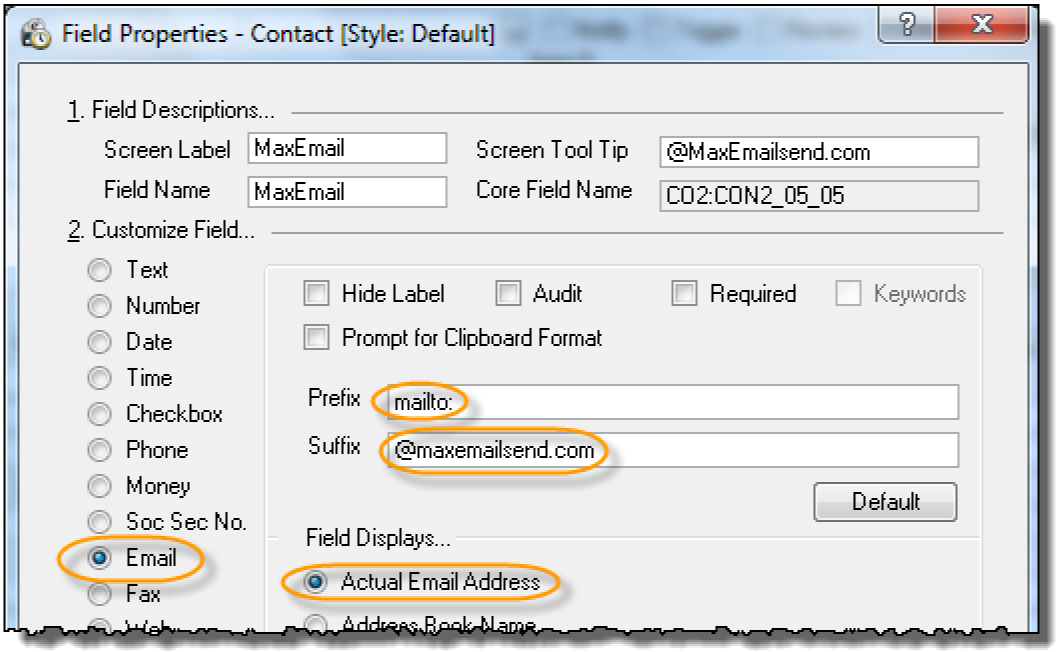
Set up Time Matters to send faxes via MS Outlook

You can start a fax from a Time Matters Contact record with one click and send it out via MS Outlook. You need to MS Outlook Email set up and a MaxEmail account ($2 per month – see above).

Customize a Contact field to send a fax:

Right-click on an unused field. (Note: Take care if you use Time Matters Form Styles or have purchased a Features Package that customizes Contact Forms. It is best to work with a consultant.) Select: **Email**. Select: **Actual Email Address**

In the **Prefix** field, enter: **mailto:** (Make sure you add the colon.)
In the **Suffix** field, enter: **@maxemailsend.com**



Change the **Screen Label** and **Field Name** to MaxEmail

To use this new field:

Enter the contact's fax phone number with a 1 at the front and no punctuation:

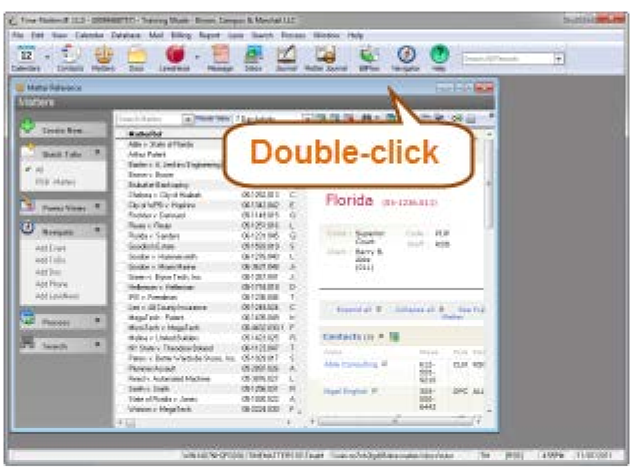
The entry in the field should look like: **18153018545**

Now you can click the button to open an MS Outlook e-mail that will be delivered to the recipient's fax number.

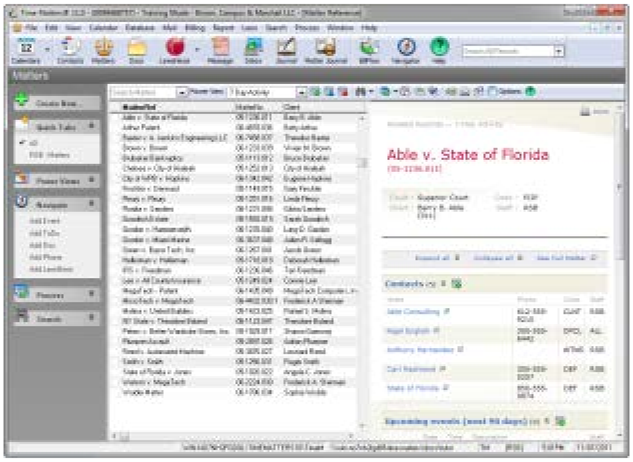
Use the Whole Time Matters Desktop

Expand a List to fill the Time Matters desktop

Double-click on the top bar of a list window in Time Matters if it does not fill the whole Time Matters desktop.



List now fills the Time Matters desktop:

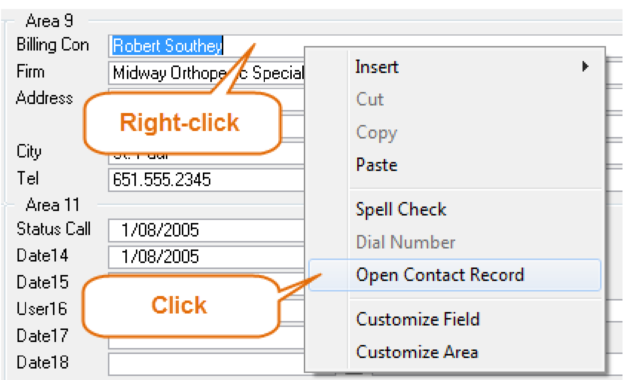


Park Forms at the bottom of the Windows Desktop

Time Matters lets you link many records to a particular Matter. If you need to refer back and forth between related records, you can open them and park them at the bottom of the Windows Desktop.

To open Contact records from a Matter record:

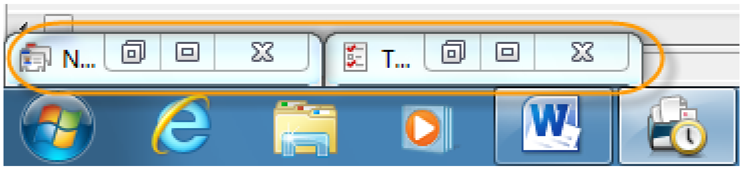
Right-click on the field of a linked Contact and choose: **Open Contact**



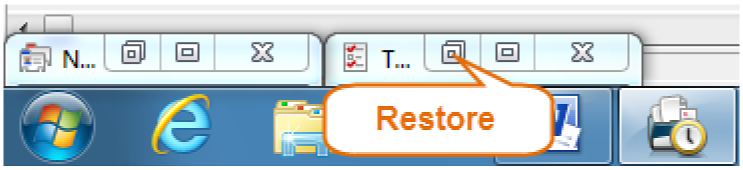
Minimize the Contact record by clicking its Minimize icon 

The Contact record is parked at the bottom of the Windows Desktop:

Park another record of any type and both appear at the bottom of the Windows Desktop:



To restore either record, press its middle button:



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Training and Customizing Time Matters