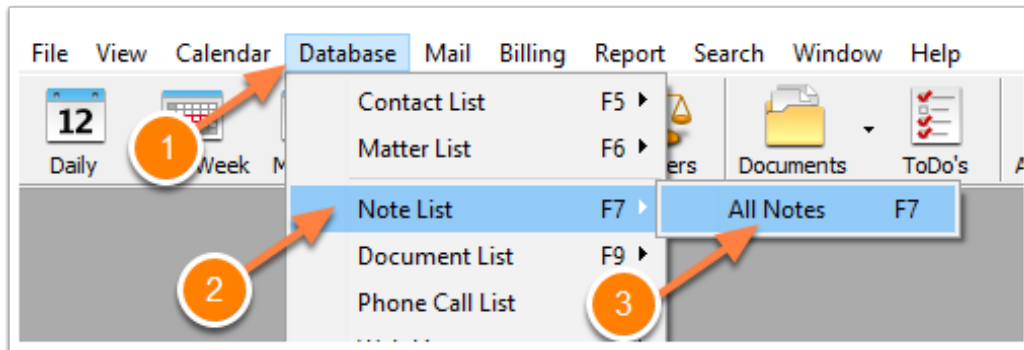How to create a list of any sort of Time Matters records and send them to an Excel spreadsheet
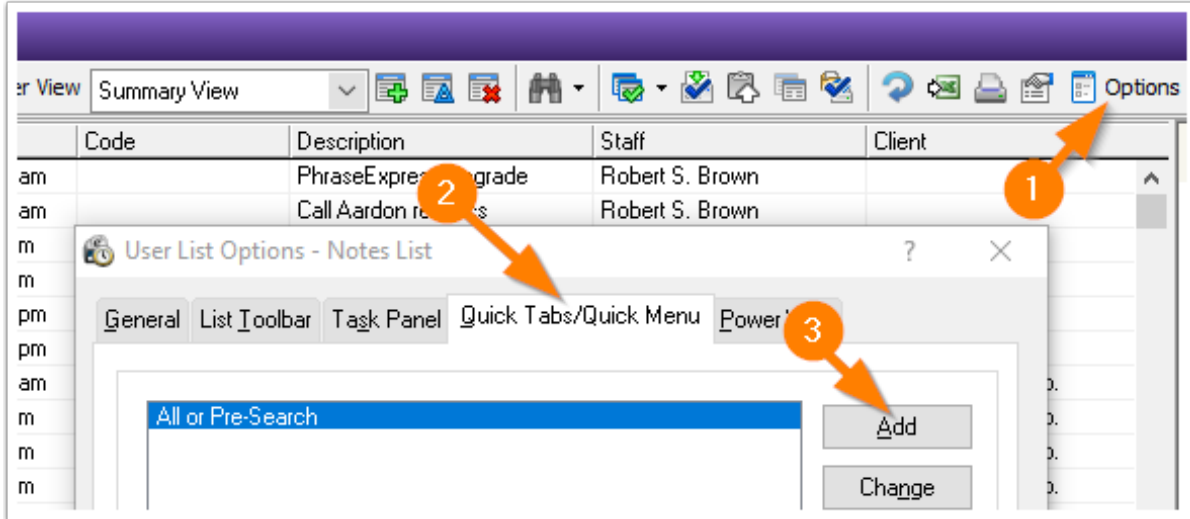
Open a Time Matters List

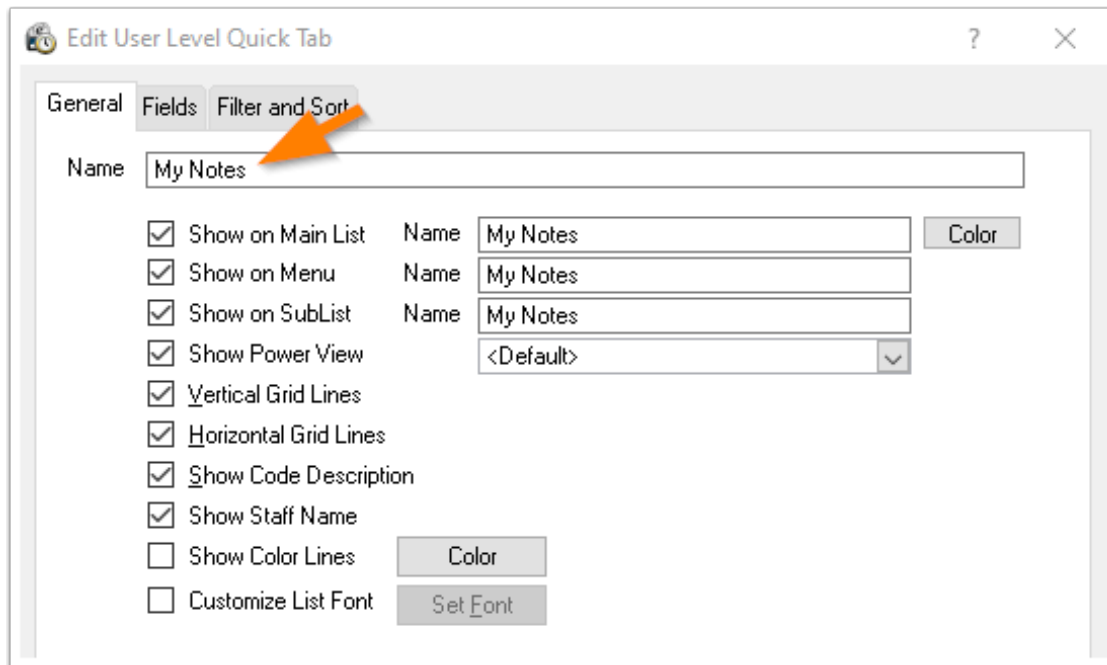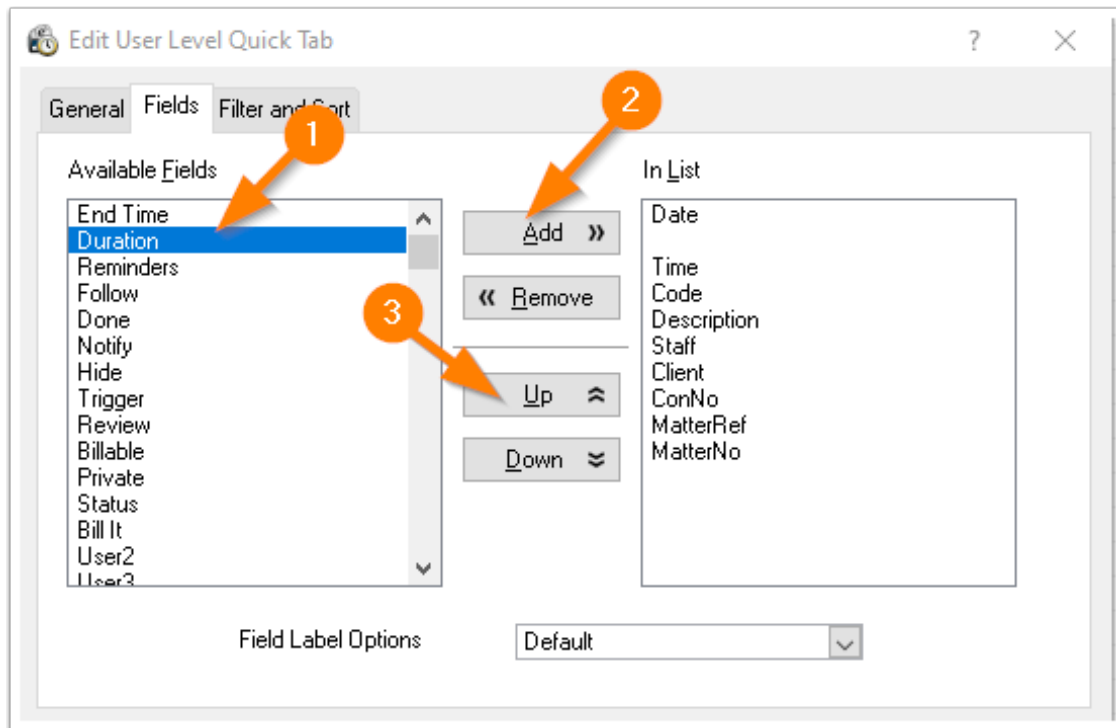Open any List in Time Matters. In this example, the Notes List is opened.

Add a Quick Tab

Clic the Options icon, Quick Tabs tab, and Add button.
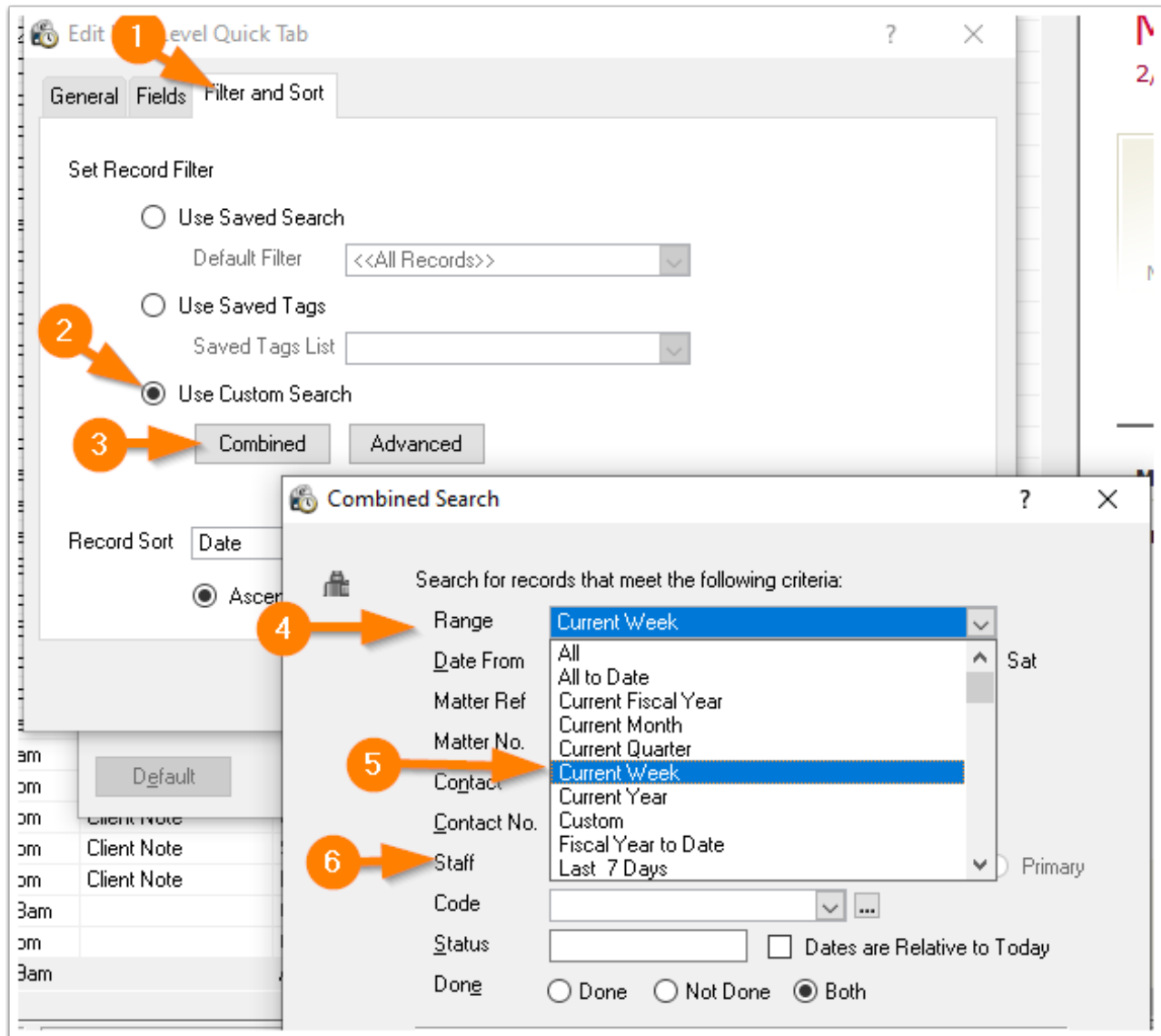
Give the Quick Tab a Name

Select the Fields (Columns) for the List

Filter the List

Include the records you want by creating a filter for the list.

Here is an example of using the Combined Search button to filter by Date Range and by Staff
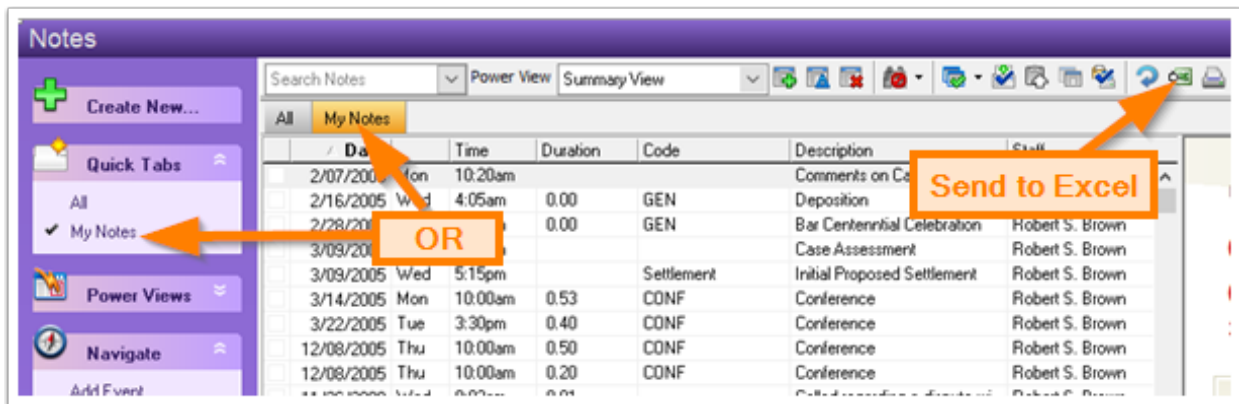
Click the List and Send to Excel

In this example, we created a User Level Quick Tab.

It appears only on the Time Matters of the user who created it. Other Time Matters users won't see this Quick Tab.

Simply click the **Send to Excel** icon to create a spreadsheet that includes the records that appear in your list.

Author

Wells H. Anderson, CEO

Active Practice LLC - www.activepractice.com

Edina, Minnesota

952.922.1727 or 800.575.0007

Expert assistance with practice management applications

PCLaw|Time Matters Platinum Certified Partner

SecureMyFirm - www.securemyfirm.com

A service of Active Online Inc.

952.922.1120 or 888.922.1120

Protecting small firms from computer disasters