# QUICK TABS STEP-BY-STEP GUIDE
FOR TIME MATTERS

Quick Tabs allow you to select the fields and filter the records you want to see on any of the Main Lists in Time Matters, including Contacts, Matters, Events, ToDo's, Documents, Billing, Email, Outlines and more.

When you click on a Quick Tab, it displays one record per row with a field in each column. In setting up the Quick Tab, you determine the selection and order of the columns and how the records are filtered and sorted or ordered.

A User Level Quick Tab appears only in one User's Time Matters, although all of the User Level Quick Tabs may be copied to one or more other Users. A Program Level Quick Tabs appears for all users.
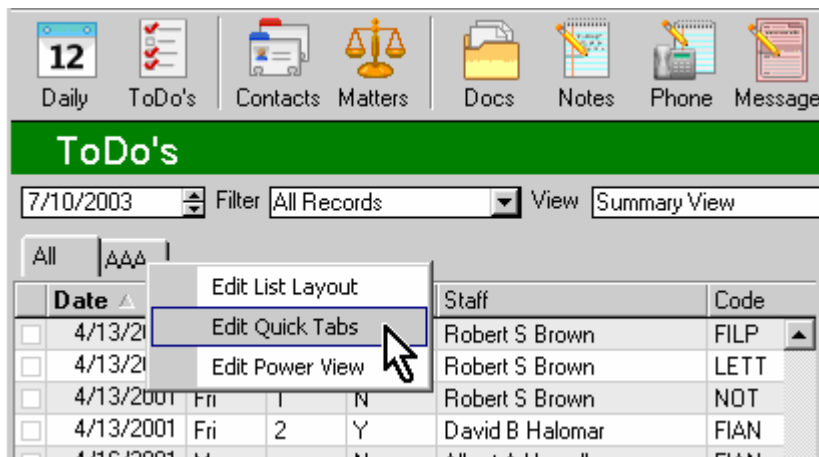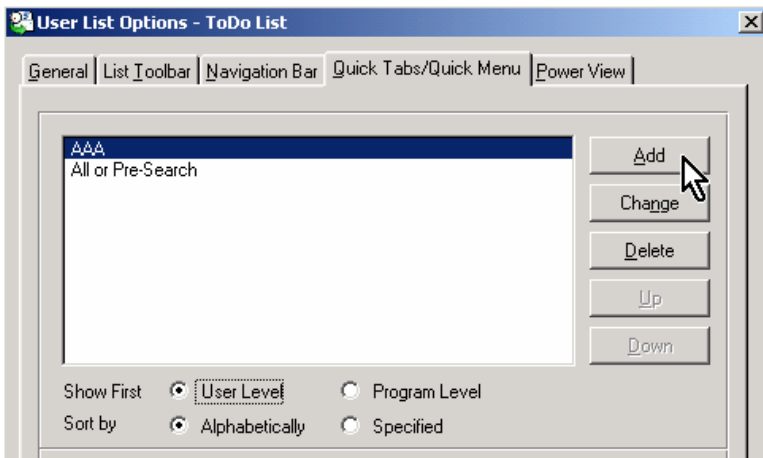
Creating a User Level Quick Tab
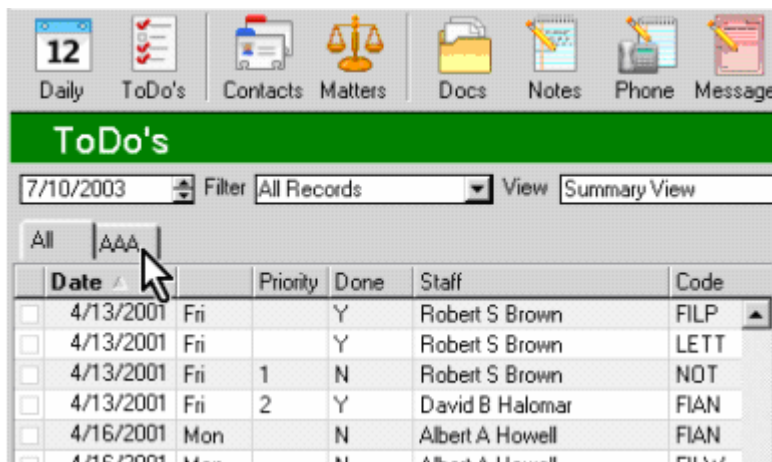
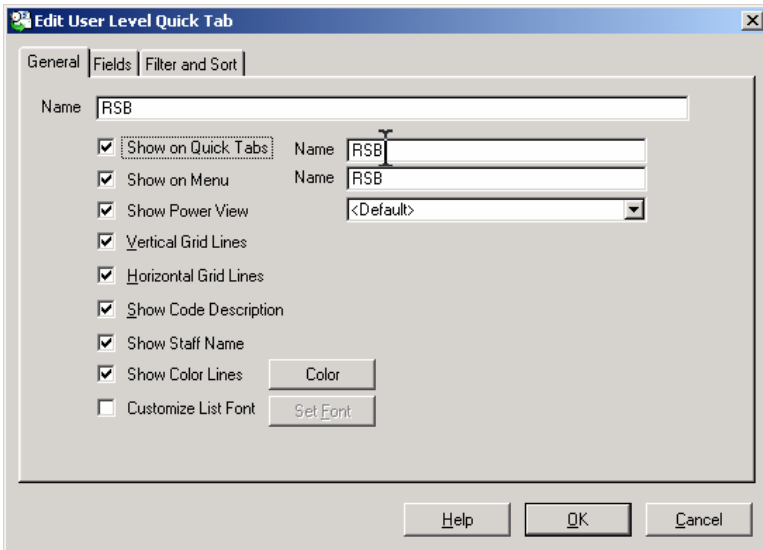Create a User Level Quick Tab to show just your ToDo's.

Go to the ToDo's.

Right-Click on any Quick Tab.
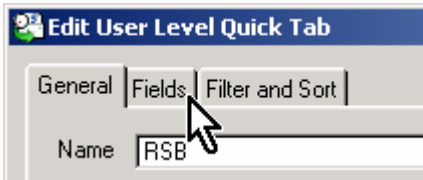

Click on Edit Quick Tabs
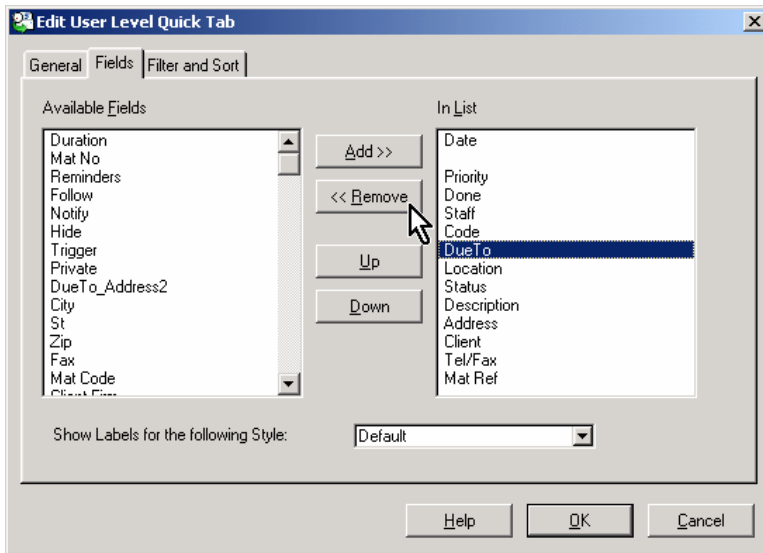
Click on the Add button

In the Name field, **type** a name for the Quick Tab.

When you press the **Tab** key or click the mouse, your field name is copied to two more Name fields.


Click the Fields tab.

In the right-side window, you see the fields that will appear as columns in your Quick Tab.
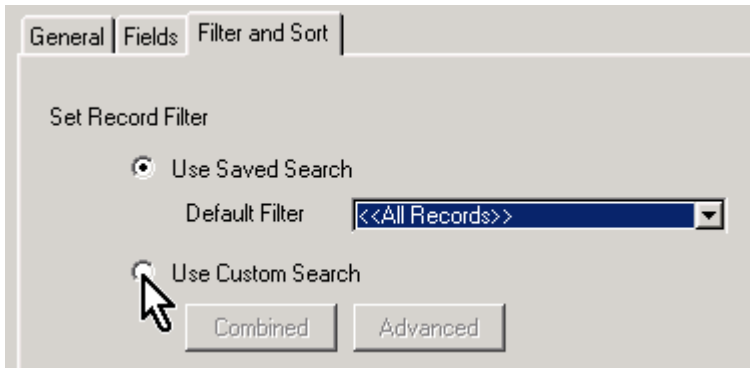
To **Remove** a field from your list, **click** on the field name in the right side list, then **click** the Remove button.

To **Add** a field to your list, **click** on the field name in the right side list., then **click** the Remove button.
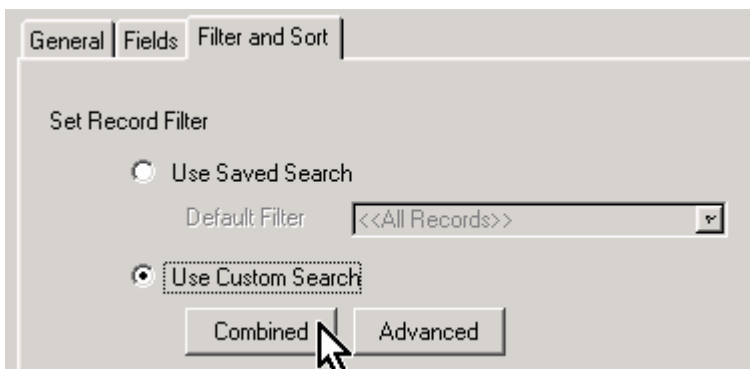
Continue removing and adding until you have the fields you want on the right side.
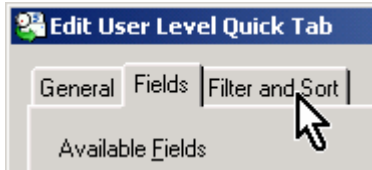
Click the Filter and Sort tab.

Click the button for Use Custom Search


Click the Combined button.

Power User Note: After setting up a Combined filter, return to this window and press Advanced. It give you more options for filtering criteria and fields to include in the filter.

The Combined Search window lets you choose what records will appear on your Quick Tab. You choose what the records must contain to be on your Quick Tab.

If you want just your records, go to the Staff field.

Click on the drop-down button, then **click** on your Staff name.

You can choose other criteria that records must match in order to be on the Quick Tab.
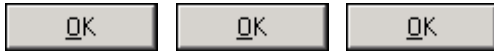
Now **click** OK three times.

Check Your Quick Tab

Click on the name of your new Quick Tab to test it.

Here is what a Quick Tab for Robert S Brown looks like.

Wells H. Anderson, J.D., CIC
Time Matters and Billing Matters Certified Independent Consultant
Active Practice LLC

http://www.activepractice.com   Tel: 952-922-1727 / 800-575-0007