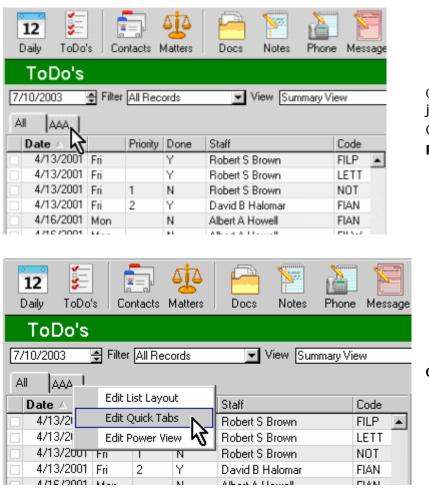
## QUICK TABS STEP-BY-STEP GUIDE FOR TIME MATTERS

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

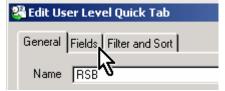
er List Opti	ions - ToDo List		
eral List <u>T</u> o	olbar 🛛 Navigation Bar	Quick Tabs/Quick Menu	wer View
All or Pre-S	earch		
			<u>D</u> elete
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			Down
, Show First	• User Level	C Program Level	
Sort by	<ul> <li>Alphabetically</li> </ul>	C Specified	

😤 Edit User Level Quick Tab						
General Fields Filter and Sort						
Name RSB						
Show on Quick Tabs Name RSB						
Show on Menu Name RSB						
Show Power View						
Vertical Grid Lines						
🔽 Horizontal Grid Lines						
Show Code Description						
Show Staff Name						
Show Color Lines Color						
Customize List Font Set Font						
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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.

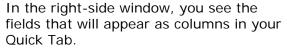
😤 Edit User Level Quick Tab

Available Fields

General Fields Filter and Sort

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Edit User Level Quick Tab     General Fields Filter and Sort     Available Eields     Duration     Mat No     Reminders     Follow     Notify     Hide	<u>A</u> dd >> << <u>R</u> emove	In <u>List</u> Date Priority Done Staff Code	×
Filde Trigger Private DueTo_Address2 City St Zip Fax Mat Code Court For		Location Status Description Address Client Tel/Fax Mat Ref	
Show Labels for the following Style:	Default	<b>_</b>	
		Help <u>O</u> K <u>C</u> anc	el



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.

General Fields Filter and Sort
Set Record Filter
Use Saved Search
Default Filter << <all records="">&gt;</all>
Combined Advanced
General Fields Filter and Sort
Set Record Filter
C Use Saved Search
Default Filter < <all records="">&gt;</all>
Use Custom Search

Advanced

Combined

Combined Search	
Search for records that meet the following criteria:         Range       All         Date From       1/01/1900         Matter Ref       Image         Matter No.       Image         Client       Image         Staff       Image         Code       AAH         ALL       All(G)         Status       ALL         All       All         Done       BEA         Babara E       Angela         Done       BH         David B       Halomar         T       David B         David B       Halomar         T       David B         BH       David B         David B       Halomar         T       David B         Matter Ref       Image         BH       David B         David B       Halomar         T       David B         Be D       Srickley         Be D       Image         BH       David B         Matter Ref       Image         Be D       Brickley         Be D       Image         Be D       Image         Be D	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. <b>Click</b> on the drop-down button, then <b>click</b> on your Staff name. You can choose other criteria that records must match in order to be on the Quick Tab.
<u>0</u> K <u>0</u> K	Now click OK three times.
To Do's         7/10/2003       ➡         All       AAA         Date       ▲         4/10/2001       Tue	<b>Check Your Quick Tab</b> <b>Click</b> on the name of your new Quick Tab to test it.
ToDo's         7/10/2003       ➡       Filter       Ad Hoc Search       ▼ View       Summary View         All       AAA       RSB       ■       ■       ■       ■         Date       △       Priority       Done       Staff       Code	Here is what a Quick Tab for Robert S Brown looks like.

Robert S Brown

Time Matters and Billing Matters Certified Independent Consultant

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http://www.activepractice.com

Wells H. Anderson, J.D., CIC

4/10/2001 Tue

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