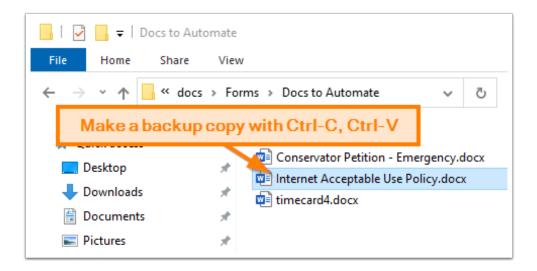


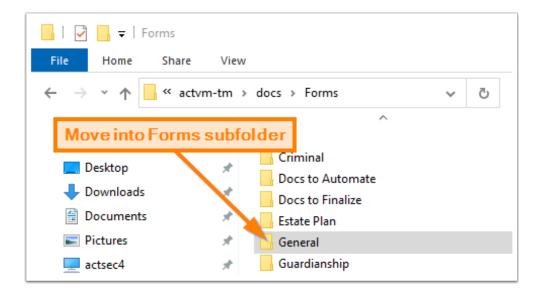
Starting with a copy of an existing document, these instructions show you how to create a Time Matters Merge Template. Merge Templates are used to create new documents by automatically inserting names and other information from Time Matters records into a Word document.

Make a backup of the document





Move the document into a Forms folder for Merge Templates

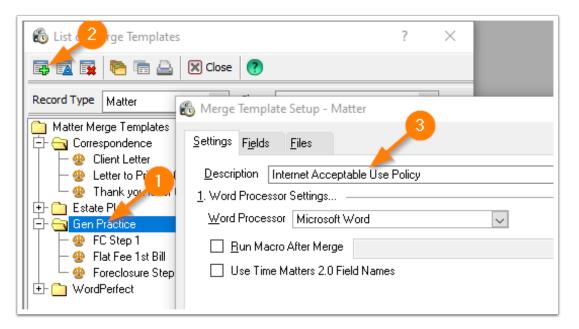


Go to Merge Templates in Time Matters

ile	View Calendar	Database	Mail	Billing	Report Se	earch	Windo	w Help		
	New Record		•	1 💼	44	l f	- -			_ 🔚
	Word Processor			Contacts	Matters	Docu	iments	ToDo's	s Add Document	Add ToD
	Launcher									
	Archives		•							
	Setup		•	Gene	eral		•			
	Import/Export		•	User	and Securit	y	•			
	Synchronize		•	Rate	s and Acco	unts	•			
	Utilities		•	Billin	g Options		•			
	Backup Time Matt	ters Data		Cod	es		•			
	Send To		•	Tem	plates		•	Aut	toEntry Form	
			Print	er Setup		•	Bill	ing Preferences		
	Recycle Bin							Cha	ain	
	Re-Login							Ele	ctronic Billing	
_	Exit							For	m Style	
								For	m Tabs	
								For	mattable Clipboar	d
								Me	rge	

Start the Merge Template

- 1. Choose a Folder in the List of Merge Templates
- 2. Add a record (green plus icon)
- 3. Enter the Description (name of document)





On the Fields tab, add fields

- 1. Click Fields tab.
- 2. Click any Field.
- 3. Click Add.

Include all the address fields and other fields that may be needed in the document.

Settings Fields Files		?
Matter		
Available Fields ConNo Trigger Review Billable Status Caption Primary Contact PriConFirm PriConAddress2 PriConCity PriConState Di ConState	3 Add Add MatRef Code MatNo Court Staff Plaint Defndt Client Notify Private	
Pri Con Zip PriConWorkTel PriConFaxTel OpAtty Y	O <u>p</u> tions De <u>f</u> ault	
Add All » Style	Default V Remove All	



Find the Time Matters Shared Files Directory

Find the Time Matters Shared Files Directory. It is shown in the bottom bar of Time Matters.

We recommend replacing the Shared Files Directory with the & character in the next window where you enter file names.

ACTVM-TM\SQLEXPRESS\TimeMatters			\\actvm-tm\docs			TM [RSB]	2:11PM	6/26/2020
					Employer :	User9 :		
Bakken	Dennis		RSB	(612) 555-33	MainTel is: :	User8 :		
Baird	Jeremy	Baird Investigations		56				
Bach	William		RSB		Matters Shared F	iles Directory		
Bach	Sharon		RSB	763 334 556		riloto i		
Augustino	Gino	Martin, Jones, Sa	AAH	305-555-730		Photo :		
Arthur	Betty		DBH	305-555-903	Cell :	kererrea by :		



Fill in the Data File name and Output File name

Part of the challenge of creating and managing Merge Templates is organizing the files into folders. You may used whatever folders you like. These instructions show one approach: Using a Forms folder inside the Time Matters Shared Files Directory. Keep your folders and files organized and use them consistently.

We recommend using folders within the Time Matters Shared Files Directory. Replace the Shared Files Directory with the & character in the file name fields.

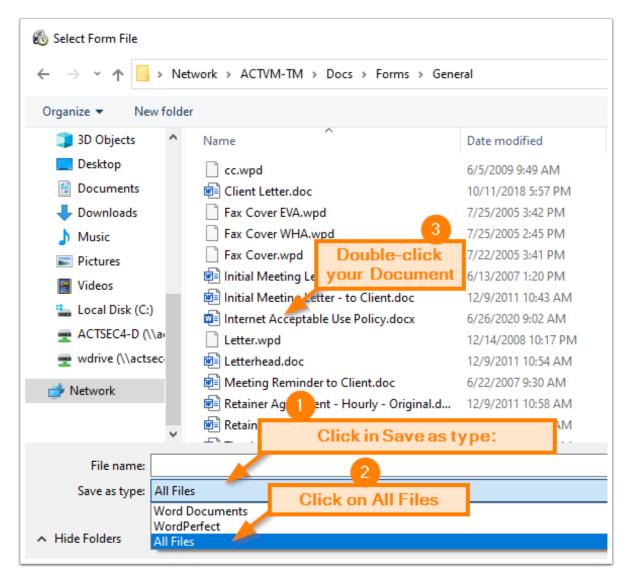
- Type in the Merge Data File name. Enter the & followed by a Temp folder.
 Note: In our example, the Time Matters Shared Files Directory is \\actvm-tm\docs.
 The Forms folder is located inside of it. The Temp folder is inside the Forms folder.
- 2. Enter the & and the Temp folder followed by the Document Name in the **Merge Output File** field.
- 3. For the **Merge Form File** name, click the [...] lookup button.

🚯 Merge Template Setup - Matter ?	\rightarrow	\times
Settings Fields Files Enter Temp folder and		
<u>1</u> . Specify Merge Data File Data File name		-
Enter Complete Path and File Name	9	
&Forms\Temp\WORDDATA.DAT		
Prompt for File Name When Merging	e	
2. Specify Merge Form File Click	_	-
Enter Complete Path and File Name		
	<u> </u>	
2 ate or Open Merge Form F	ïle	
3. Specify Merge Output File Enter Output File nam	e	-
Enter Complete Path and File Name		
&Forms\Temp\Internet Acceptable Use Policy.docx	••••	
Prompt for File Name When Merging Prompt Before Overwriting File	Э	



Select the form document

- 1. Click the Save as type drop-down.
- 2. Click on All Files.
- 3. Double-click on your form document.





Replace the Shared Files Directory text with &

Replace the Shared Files Directory part of the field with &.

Click the button, Create or Open Merge form File

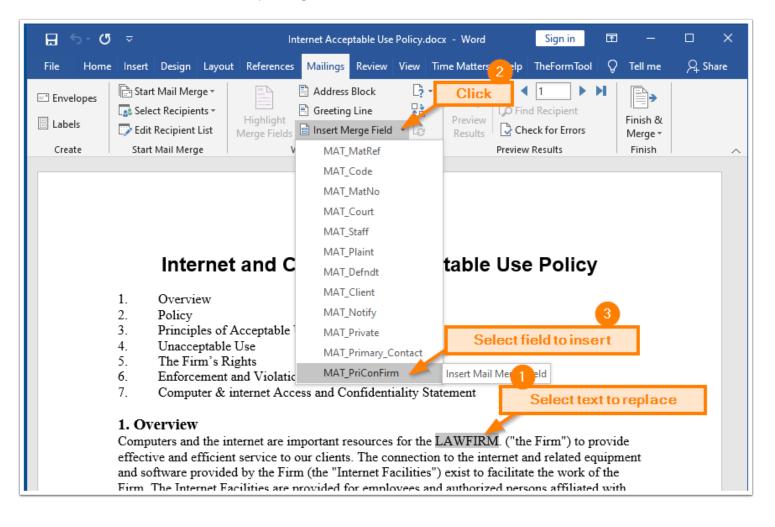
If there are any errors in the three file name fields or if the form document is still open, you will see an error message.

🚯 Merge Template Setup - Matter 🛛 ? 🛛 🗙						
<u>Settings</u> F <u>ields</u> <u>Files</u>						
1. Specify Merge Data File						
Enter Complete Path and File Name &Forms\Temp\WORDDATA.DAT						
Pr Delete and enter & Prompt Before Overwriting File						
2. Specify Merge Form File Enter Complete Lath and File Name Click						
Enter Complete Cath and File Name <u>VACTVM-TM\Docs\</u> Forms\General\Internet Acceptable Use Policy.docx						
Create or Open Merge Form File						
3. Specify Merge Output File						
Enter Complete Path and File Name						
&Forms\Temp\Internet Acceptable Use Policy.docx						
Prompt for File Name When Merging Prompt Before Overwriting File						
<u>D</u> K <u>C</u> ancel						



Replace text with fields

- 1. Double-click text you want to replace with a field, such as the Firm Name.
- 2. Click the drop-down button next to Insert Merge Field.
- 3. Choose a field to insert, replacing the selected text.

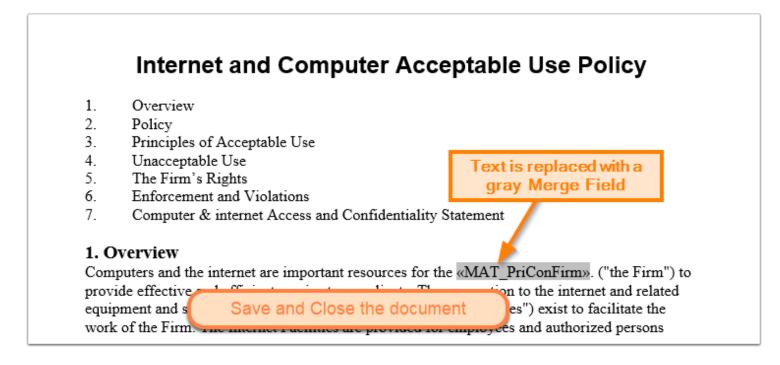




Fields added to the Merge Form file appear highlighted

Each Merge field will appear highlighted in gray in MS Word. (There is an option in Word to enable or disable this highlighting.)

Save and Close the Word document.





Close the Merge Template record in Time Matters

🚯 Merge Template Setup - Matter ?	<
<u>S</u> ettings F <u>i</u> elds <u>Fi</u> les	
<u>1</u> . Specify Merge Data File	
Enter Complete Path and File Name	
&Forms\Temp\WORDDATA.DAT	
Prompt for File Name When Merging Prompt Before Overwriting File	
2. Specify Merge Form File	
Enter Complete Path and File Name	
&Forms\General\Internet Acceptable Use Policy.docx 🗸 🛶	
Create or Open Merge Form File	
3. Specify Merge Output File	
Enter Complete Path and File Name	
&Forms\Temp\Internet Acceptable Use Policy.docx	
Prompt for File Name When Merging Prompt Before Over Click Click	1
<u>D</u> K <u>C</u> ancel	

Author

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