

How to link a Matter Field to a Contacts Field

Customization of Contact Form

You may find it a time-saver to have one or more Matter fields appear in a client's Contact record. Field Matching in Time Matters allows this.

A field in a Matter needs to be matched to a field in the Contact Form. The automatic copying happens when the Matter field, in this example, Trigger, is manually changed in the Matter Form. If you are using Form Styles, you need to make these customizations in the File / Setup / Templates / Form Style settings of Time Matters.

In this example, the **Trigger box** of the Contact record will be checked if the **Trigger box** is clicked in the Matter field for the Aamond client and matter. The following eight steps customize the Mat Ref field of a Contact record to pull in the value of a field that is changed in the related Matter record.

Heads Up: While the copying will happen automatically if you manually change the field in the Matter record, it will not happen if you use the Main Menu / Process / Change Records feature.

Copy a Matter field to a Contact automatically

Contact Form - Change			
File Edit View Process Help			
Right-click.			
Erimary	Secondary Additional Belate	d Choose: Customize Field eline A/B Outline Matter Marketing Events	
Full Name	Aamond, Pat	Code 3 pt	
Last	Aamond	First Pat	
Sal		Main 651.333.3333	
Mat Ref	Aamond Project	00-0279a 🔩 🔲 N General Field Matching	
Area 2		Katch Lookup Fields Match Lookup Fields	
Firm Tale	Aamond & Associates	Highlight the Field from the Lockup Becard List (List on the left), then highlight	
Address	345 Front Avenue	1. Field Descriptions in this Record (List on the right). Then click the Match button to match the two	
	S45 Hone Avenue	Screen Label Mat Ref Screen Tool Tip Ma	
City	Saint Paul	Field Name MatRef Core Field Name Ct Fields in Lookup Recor A Matched Fields Fields in Lookup Recor A MatRef	
Alt#/Cell	651.332.1111	2 Customize Field	
Area 4		Text Trigger Text Trigger	
E-mail	paamond@nothing.com	Number Hide Label Madit Staff Billable	
Bus Type Products		Date All Caps Spell Check Subtopic Private	
ActiveU mto		- Time Specify Field Entry Choices Ed Contact	
REFER BY	,	- Checkbox Field Lookup Options ConNo Inte Notify Main Address1	
Subcode/6a	3	Main Address2	
Memo		O Soc Sec No. O Lonkun from P Matter	
		Email Lesius for 2	
		Fax Cooked norm (Un-Match Match)	
		O Web	
		Calculated Set Field Links	
		O Hidden	
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