



Introduction to Here's How Procedures

The Here's How Procedures is a course of action for the successful implementation of Time Matters. Providing detailed action steps for the end-user and the in-house administrator, this guide is really about where to click and what to type to get from point A to point B. It imparts the experience I have gathered from more than 200 firms and 10 years of Time Matters consulting.

The format is simple and easy to use. Procedures are broken down into topics. An expanded narrative on the topic is given in **The Big Picture** section. This provides an overview and a context for the topic. **Nuts & Bolts** introduces the specific **Action Steps** that lead you through the procedures.

Additional helpful information and ideas can be found in **Tips & Tricks**. The **Admin & User Setup** section gets you behind the scenes with settings that make the procedures work. As we develop specific customizations, the procedures are edited to reflect any changes. The end result is a complete procedure guide customized to your office workflow providing an invaluable resource and training tool.

Included is a set of initial customizations that standardize and simplify the software setup. **Package Features** quickly imports the basic building blocks saving you time and money.

With more than 45 Here's How topics currently available online, you can easily add more advanced procedures for your office. An index of current topics as well as an example of procedures for adding Contacts follows this introduction. The cost is a one-time fee of \$300 and includes a hardcopy basic procedures manual and a CD of the procedures and Package Features. Give me a call to discuss how you can benefit from developing your Here's How Procedures.

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Contacts

THE BIG PICTURE

The Contact Form in Time Matters[®] is the starting point for building a great database, and getting off to a great start will require having a good understanding of how to navigate and enter data. The lessons learned here translate to all the other record types.

Best practices are laid out in this guide and will focus on ease of navigation, avoiding duplicate entries, and building the foundation for the powerful relationships (linked records) that make your data easy to use and understand. We will also look ahead to Document Automation by setting up the consistent use of our Contact fields for Merge Documents.

Contact records are generally considered your Personal Information Management system (PIM). If you plan on using the Case form, you will want to limit your Contact data to personal information and exclude Case¹ or Account type information. We will focus on two types of Contact Forms: 1) **Org Name** Forms to hold information on Firms, Companies, and Organizations, and, by definition, will not contain any individual's information, and 2) **Full Name** Forms which contain specific information for an individual and link to an Organization record. This linking of individuals to an organization is an important first step in building a relationship database.

Example: We will add the organization record Able Consulting and full name record for Barry Able.

Procedures are provided at the end of this guide for administrators and users with the ability to change their own settings. Please look over these procedures titled ADMIN & USER SETUP beginning on page 7, prior to continuing with the Nuts & Bolts action steps.

¹ Please note that we will use the term Case, but depending on your software set-up and series, you should replace Case with Matter, Engagement, Project or Account.

Here's How Procedures

NUTS & BOLTS

Navigating the Contact List

<p>ACTION 1 From your Main Menu, click on the Contact icon or use F5 to open the Contact list.</p>	<p>Note the Main Menu remains unchanged and you now have additional icons below the Contact list's blue title bar. Time Matters at its simplest level is a series of lists and records in a spreadsheet format. Time Matters also provides a view of selected fields from the highlighted record in a format called a Power View. The default is for this to display on the right hand side of your Contact list.</p>
<p>ACTION 2 Start typing a last name and watch as the name comes up as you add each letter.</p> <p>Click on the header "Firm" and start typing a firm name.</p>	<p>The simplest method to find a record in a list is to start typing. That's right, the QuickPic feature starts searching on the default header column that is displayed in Bold. To QuickPic a different column, click on a different Header. Click again on the Header to resort the list in ascending/descending order.</p> <p>TECH TALK - Header is the column heading such as Ref Name, Last, Firm etc...</p>

All tab **Header/Column (bolded for QuickPic)** Contact Toolbar

The screenshot shows the LexisNexis Total Practice Advantage interface. The top menu bar includes File, Edit, View, Calendar, Database, Mail, Billing, Report, Search, Process, Window, and Help. Below the menu is a toolbar with icons for Calendars, Alerts, Events, ToDo's, Contacts, Matters, Docs, WF, Message, Inbox, Add Event, Add ToDo, Add Note, Add Doc, Add Phone, Add WF, Launch, Navigator, and News. The main window displays a 'Contacts' list with a search bar and a 'Power View' dropdown. The list has columns: Ref Name, Firm, Code, Main, Fax, E-Mail, Address, and Main_Address2. The 'Firm' column is bolded. The list contains various contact entries such as '4th District Court of Appeals', 'Able Consulting', 'Able, Barbara', etc.


Ref Name	Firm	Code	Main	Fax	E-Mail	Address	Main_Address2
4th District Court of Appeals	4th District Court of Appeals		561-555-0203	561-555-3423		P.O. Box 1324	561-555-1634
Able Consulting	Able Consulting	COMP	612-555-9210	612-555-0418	info@fastport.com	375 Jackson Street N	Suite 220
Able, Barbara		SPDU	919-665-8990		bari@hotmail.com		
Able, Barry B.	Able Consulting	CLNT	612-555-9210		bable@fastport.com	375 Jackson Street N	Suite 220
Abraham, Diane P.	Davis and Woodbridge	ATTY	305-555-1702			45 Biscayne Boulevard	Suite 1200
Abrams, Saul		DEF	516-555-0032	516-555-0034			
ACME Travel	ACME Travel	TRAV	800-555-AWAY		suzie@fastport.com	1234 Nokon D'Door Rd.	
ACME Travel	ACME Travel		800-555-AWAY			1234 Nokon D'Door Rd.	
AIMCO Precision Inc	AIMCO Precision Inc		602-254-2187			401 West Walkins	
Alexander Hotel	Alexander Hotel	CLNT	305-555-5617	305-555-5617		100 South Beach Drive	
All American Insurance Company	All American Insurance Company		404-555-4747	404-555-3903		1050 Greenway Drive	
All County Insurance-Coral Gables	All County Insurance		305-555-6730	305-555-0194		South Insurance Tower	
All County Insurance-Miami	All County Insurance		305-560-1234			123 N. 1st Ave	
Allen, Wayne		CLNT	305-555-2395				
Alright, William		EXPT	801-555-1234	801-555-1235		2743 NW 92nd Place	
Arthur, Betty		CLNT	305-555-9033			18907 NE 42nd Avenue	

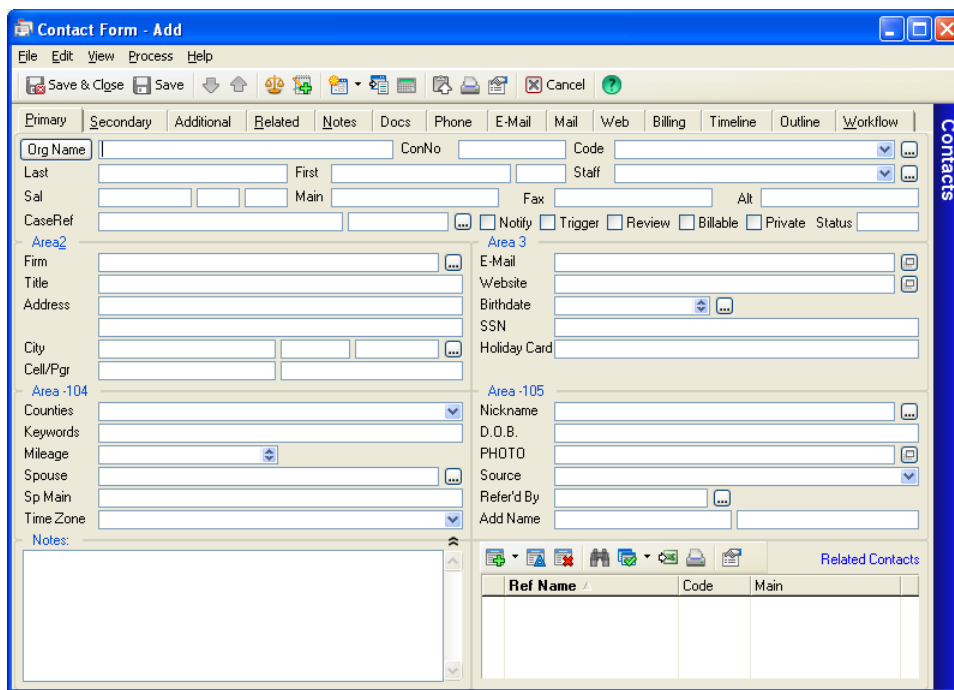
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There are two types of Contact Forms, **Full Name** and **Org Name**. The **Full Name** button is a toggle that allows you to select Full Name or Org Name. Org Name Forms are for a Firm, Corporation, Company, etc. that do not include an individual's information. This is typically a Master record to which you will link Full Name Forms.

Example: Your Firm or Company would be an Org Name Form. You and your office staff would be Full Name Forms linked to the firm.

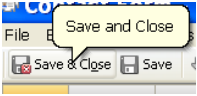
Adding an Org Name Contact Form

<p>ACTION 1 From the Contact list toolbar, Click on the Add Record icon (Green +) or Ctrl+Shft+C to open a new Contact Form.</p>	<p>The Green Plus Symbol is used throughout Time Matters for adding records.</p> 
<p>ACTION 2 To add an Organization Form, Click on the Full Name button to change the label to Org Name.</p>	<p>Last Name, First Name- MI- fields are bypassed Org Name is copied to the Firm field in Area 2</p>

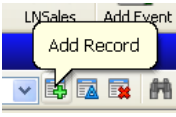


<p>ACTION 3 Organization Record: Type in the Organization name as you would want it to appear on the first line of an address label.</p>	<p>Use uppercase and lower case as appropriate.</p>
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<p>ACTION 4 Tab to the Code field and enter the appropriate Classification Code by using the dropdown arrow or typing in the code. Use the Tab key to enter your data and advance to the next field.</p>	<p>The Tab key advances you through the Form. Shft+Tab moves you to the previous field. Enter, or the Return key, saves and closes the Form.</p>
<p>ACTION 5 Fill in the Main, Fax and Alt phone fields as appropriate. Use the format 602-667-5706.</p>	<p>The phone number format with hyphens is easy to type and is used in other programs that integrate with Time Matters. Note extension with an x. Example: 602-956-4447 x 3435</p>
<p>ACTION 6 Go to the first address line in Area 2 and type in the street address. Use the second line for Suite numbers, etc. Fill in City, State, and Zip, E-mail, etc... and click Save & Close.</p>	<p>Again use upper and lower case as you would want it to appear on an inside address or envelope. Use the two letter code for States. Example: AZ</p> 

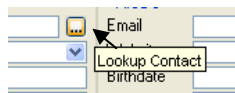
Adding a Full Name Contact Form

<p>ACTION 1 From the Contact list, Click on the Add Record icon (Green +) or Ctrl+Shft+C to open a new Contact Record.</p>	
<p>ACTION 2 Use the default Full Name and type the name using the format: Last Name, First Name MI. Example: Able, Barry B.</p>	<p>WHY? - Using the last name first gives you a Last Name search for individuals. Note: The ConNo field is optional and may be used to give the Contact Form its own unique number.</p>
<p>ACTION 3 Tab to the Code field and enter the appropriate Classification Code by using the dropdown arrow or typing in the code. Use the Tab key to advance to the next field.</p>	<p>Classification Codes for Full Name contact will be different than Org Name contact. Example: Able Consulting – COMP Company Able, Barry B. – CLNT Client</p>
<p>ACTION 4 Fill in the Main, Fax and Alt phone fields as appropriate. Use the format 602-667-5706.</p>	<p>The Full Name phone fields may be different than the Org Name phone fields.</p>

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ACTION 5

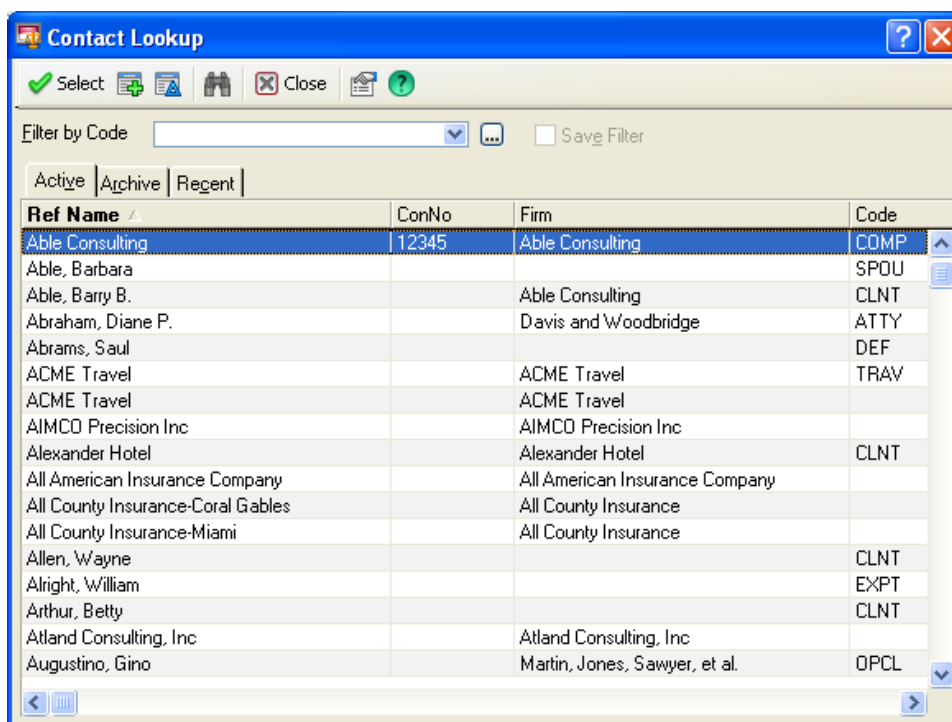
Go to the **Firm Field in Area 2** and use the Lookup button to the right to open the Contact Lookup screen. Highlight your organization by typing the name using the QuickPic feature. With the organization name highlighted, click on Select or use Enter to return to your Contact Form.



If this is an individual not associated with an Org Name Form, go to the **first address line in Area 2** and complete the address including city, state and zip. Leave the **Firm** field blank.

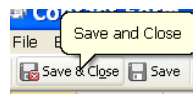
IMPORTANT! This links the Full Name Form to the Org Name Form and brings the address into your Full Name Contact in Area 2. Do not type information into Lookup fields without using the Contact Lookup button or you will not create the link.

WHY? - This step allows for the Auto Update feature in the Org Name record to change information such as address and phone number and automatically update all of the related/linked Full Name Records. It also allows you to use one Merge for all the variations of Full Name and Org Name records. When using the Contact records throughout the rest of the database, you will always have the choice of using either the Full Name or Org Name record in your Contact Lookups.



ACTION 6

Click on **Save & Close**.



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Having completed these actions, you should have two distinct Forms; an Org Name and Full Name Form that looks like these examples.

(Org Name)

The screenshot shows a software window titled "Contact Form - Change" with a menu bar (File, Edit, View, Process, Help) and a toolbar. The form is divided into several sections: Primary, Secondary, Additional, Related, Notes, Docs, Phone, E-Mail, Mail, Web, Billing, Timeline, Outline, and Workflow. The "Org Name" section is active, showing fields for "Org Name" (Able Consulting), "ConNo" (12345), "Code" (COMPICompany), "Last" (Able), "First" (Barry), "Staff" (RSB|Robert S. Brown), "Sal" (612-555-9210), "Fax" (612-555-0418), and "Alt" (612-555-9341). Below this, there are checkboxes for "Notify", "Trigger", "Review", "Billable", "Private", and "Status" (A). The "Area2" section contains fields for "Firm" (Able Consulting), "Title" (Principal), "Address" (375 Jackson Street N, Suite 220), "City" (St. Paul, MN, 55101), "Cell/Pgr", and "Countries". The "Area3" section includes "E-Mail" (info@fastport.com), "Website" (www.timematters.com), "Birthdate" (8/19/1963), "SSN" (000-00-0005), and "Holiday Card". The "Area-104" section has a "NickName" field. A vertical "Contacts" sidebar is on the right.

(Full Name)

The screenshot shows the same "Contact Form - Change" window, but with the "Full Name" section active. The "Full Name" field contains "Able, Barry B.". The "ConNo" field is empty, and the "Code" is "CLNT|Client". The "Last" field is "Able", "First" is "Barry", and "B." is in the "Staff" field. The "Sal" field is "612-555-9210" and "Alt" is "612-908=7767". The "Area2" section is identical to the previous screenshot. The "Area3" section has "E-Mail" (bable@fastport.com) and "Website" (www.timematters.com). The "Area-105" section has a "NickName" field. The "Contacts" sidebar is on the right.

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TIPS & TRICKS

In general it is preferred to leave the contact Staff field blank. The Staff field represents responsibility and is better managed in other form types such as Cases, Events & ToDos.

Do not type information into a Lookup field. Your data will not be linked! Use the Lookup button to the right of the field.

Additional navigation includes typical Windows conventions: Page Up, Page Down, Right-clicking an entry for a Properties menu, Enter or double-clicking to open a record, Ctrl+C to copy, Ctrl+V to paste, and so on. Experiment and have your way with Windows.

Scrolling is often the least effective way to get around in Time Matters. If you find yourself scrolling, look for a better way.

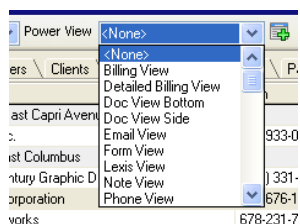
Reference - MME Consulting Services Time Matters Keyboard

ADMIN & USER SETUP

Time Matters is highly customizable and it is helpful to make a few changes to the default settings to achieve the best training results. The following setup is for either the Time Matters administrator or the end user who has the ability to change their user level settings. This setup will provide a simple one-column search for Contacts, both **Full Name** (Individuals) and **Org Name** (Companies and Firms) Forms using the **Ref Name** field. Also turning off the **Power View** feature helps the new user experience the Contact list in a familiar spreadsheet format. Also reference the **Here's How Procedures 'Contact Lookup Screen'** for important property settings for using this feature.

ACTION 1

From the Contact List Toolbar use the **Power View** dropdown and select <None>



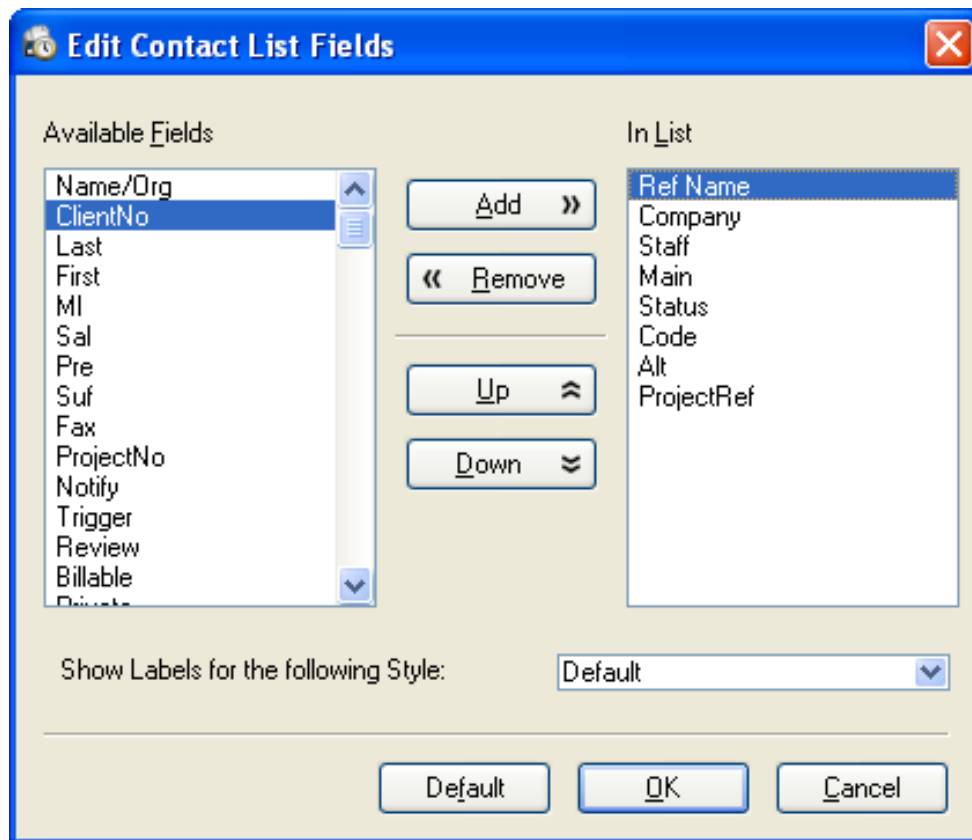
This will temporarily turn off the Power View until the Contact list is closed and reopened. Power Views can be customized at the Program, User and Quick Tab level.

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ACTION 2

From the Contact List, right-click on the **All** tab and select **Edit Columns**. In the **Edit Contact List Fields** screen select **Ref Name** under **Available Fields** and click on the **Add** button to move your selection to the **In List**. Under the **In List** selection, select **Last** and click on the **Remove** button. Select **Ref Name** and use the **Up** button to move **Ref Name** to the top of your list. Click **OK** to return to your Contact list.

WHY? - Ref Name allows you to easily search by Full Name and Org Name in one column. This eliminates the need for the "Last" and "First" header in your list.



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ACTION 3

Right-click on the **All** tab and select **Edit Quick Tabs**. From the list of Quick Tabs select **All or Pre-Search** and click on the **Change** button. From the **Filter and Sort** tab use the dropdown field for **Record Sort** and select **Ref Name**. Click **OK** to return to your Contact List.

Set the **Ref Name** header as the permanent default search when opening the Contact List.

The screenshot shows a dialog box titled "Edit User Level Quick Tab" with three tabs: "General", "Fields", and "Filter and Sort". The "Filter and Sort" tab is active. Under "Set Record Filter", there are three radio button options: "Use Saved Search" (selected), "Use Saved Tags", and "Use Custom Search". Below "Use Saved Search" is a dropdown menu for "Default Filter" set to "<<All Records>>". Below "Use Saved Tags" is a dropdown menu for "Saved Tags List". Below "Use Custom Search" are two buttons: "Combined" and "Advanced". A blue note reads: "Note: Filter settings for this tab are set on the User List Options -> General Tab". Below this is a "Record Sort" dropdown menu set to "Ref Name". At the bottom are two radio button options: "Ascending" (selected) and "Descending". At the bottom right are "OK" and "Cancel" buttons.

ACTION 4

Reference the **Here's How Procedures 'Contact Lookup Screen'**

This is one of the places you can enforce the **Ref Name** field as a single column to find any **Full Name** or **Org Name** Contact Form. This setup is on the User Level and it is recommended that your Time Matters users know how to change these settings from their user login.