FROM ARITA'S DESK

A.B. CONSULTING   October 2004

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Time Matters® 6 with Billing Matters Plus

New version is packed with new features including new accounting option

Last March DATA.TXT Corporation, the home of Time Matters Software, was acquired by LexisNexis. One result is a new version full of impressive features, just 16 months after the release Version 5. Here are the highlights.

Billing Matters Plus

This option expands Billing Matters (see *From Arita's Desk* November 2003) adding general ledger, check writing and accounts payable. It eliminates the need to link Billing Matters to QuickBooks.

TM Connect for Outlook

This feature brings Time Matters data into Outlook records. For example, you can create TM Contacts, Emails, ToDos and Events from comparable Outlook records. The TM Save Attachment button opens a Time Matters document record for profiling the document in Time Matters. TM Connect matches the email sender's address to a Time Matters contact record and fills in the regarding boxes of the Time Matters record. The TMInsider is available when creating email messages to bring text and data in from Time Matters.
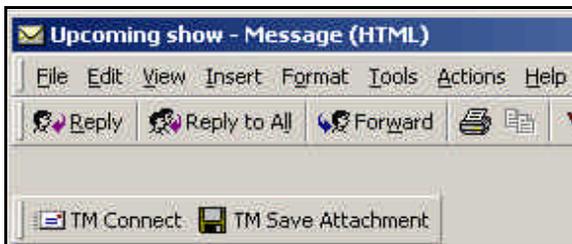
TM Buttons on Incoming Outlook Email Message
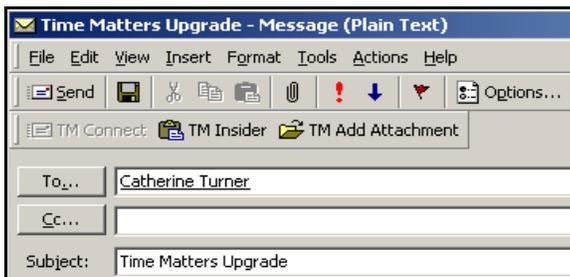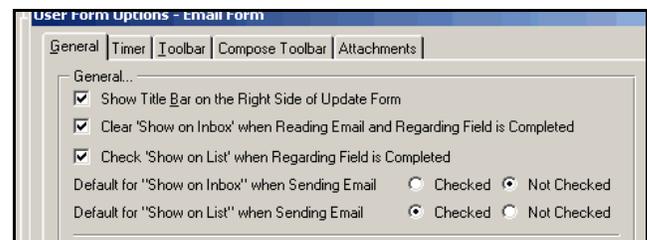

TM Buttons on Outgoing Outlook Email Message

Time Matters Email Management

Optimize performance by managing your inbox

Now that more of you are using Time Matters email, it's time for some tips that will help keep your inbox manageable. First, some background on how Time Matters email is stored. Your Personal Inbox is the place you go for sending and receiving email. Until opened, these email messages are viewable only by the owner of the email account associated with the logged in user. The Time Matters Email List is where emails appear when opened and saved with the "Show on List" box checked. As with other Time Matters lists, the email list is viewable by all users.

The user level email account settings provide ways to automate the movement of email from the Personal Inbox to the Email List. For example, in my settings, I checked the option to "Clear 'Show on Inbox' when Reading Email and Regarding Field is Completed. This choice automatically removes the message from my Inbox, and puts it onto the Email List, in one step.


Email Form Options

CONTENTS

Integration with More Applications

Time Matters now integrates with Acrobat, Excel, PowerPoint, Internet Explorer and Outlook. Time Matters detects whether the supported versions of these products are on the computer, and automatically turns on the links, as with the word processing links to Word and WordPerfect. The TMInsider, TMSave and TMOpen buttons are available, as applicable, within these programs. One of the benefits of the expanded integration is that you can quickly create Time Matters document records, without leaving the program. This is especially nice for users who download PDF files from services like VeriLaw.
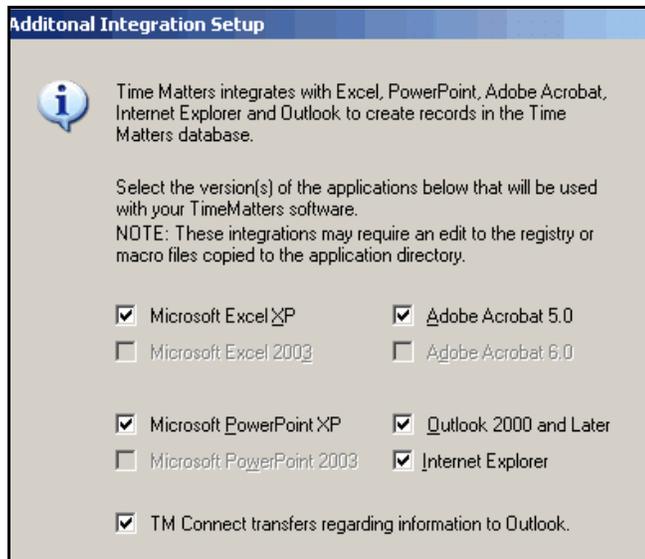

Additional Integration Setup

Early Payment Discount

Billing Matters 6 automatically computes discounts for early payments. As with version 5, enter the discount percentage and days on the Accounts Receivable tab in Billing Preferences. For example, if you offer a 5% discount if the invoice is paid within 5 days, enter "5" in the Discount and Days Due fields. Indicate whether the discount applies to Fees, Expenses, both Fees and Expenses, or Fees, Expenses and Interest. When you enter a payment, Billing Matters prompts that there is an invoice that qualifies for a discount. At this point you may elect to generate a credit. Billing matters then automatically enters a Credit transaction for the amount of the discount.

Partial payments: Be sure to set the Allocation Order field to the appropriate selection so that partial payments will not trigger an undesired discount. For example, if the discount applies to Fees only, and the Allocation Order is set to Fees, Expense, Interest, a partial payment will result in a discount. In this case you would change the Allocation Order to Interest, Expenses, Fees to assure payment of any interest and expenses before a discount is given.

More Standard Reports for Billing Matters

Billing Matters users will be happy to see the addition of a Statement, and other standard reports.
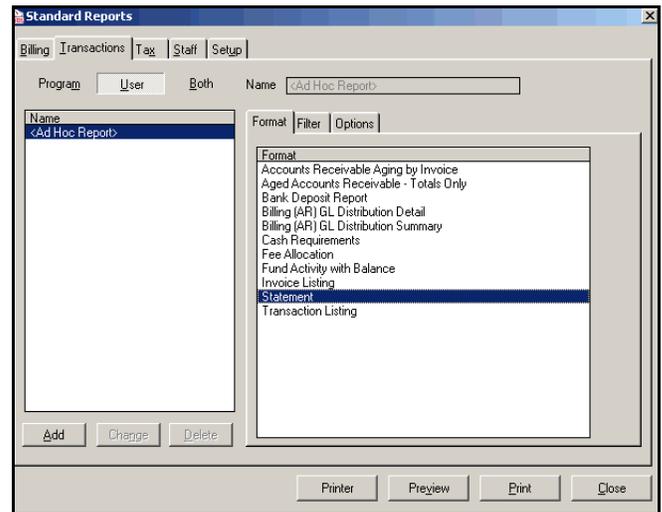
Billing Matters 6 Standard Reports including Statements

Outliner

Time Matters 6 adds a new record type, the Outline. Organize your thoughts and outline case points in Time Matters with the Outliner. You can associate other records, such as ToDos with parts of an outline. You can also send your outline to Word for further editing.

Cost

The Time Matters upgrade is on sale for a limited time. If you currently have Time Matters 5 or Billing Matters 5, only, your upgrade cost is $175 for the first user and $95 for each additional user. The Time Matters/Billing Matters bundle upgrade is $265 for the first user and $145 for each additional user. These prices are for the Professional Edition. Contact me for pricing on the Enterprise edition, and for further discounts.

For more highlights on Time Matters and Billing Matters 6, go to ww.absims.com/timematters.   ❋

Remote Access with GoToMyPC

Easy, cost-effective way to access your computer while away from the office

I recently started using GoToMyPC to allow access to my computer for product demos, or to gain access to your computer to provide remote support. This handy service lets you get to your computer from any internet connection. It requires a high-speed connection. You may be disappointed if you attempt to dial your office computer from a home dial-up internet connection. However, if you have cable, DSL, T1 or other high speed internet access, the screen response is about fast as if you were sitting at the computer. To try this service, go to GoToMyPC.com and click on Try It.   ✿

For outgoing email, I've set my options to default to show the sent message on the Email List but not in the Inbox. (See figure on page 1). To make these settings, open your Inbox and click the Options button on the title bar, then click the Send tab, and click "Set Email Form Options."

You should also keep the other folders in your Inbox clutter-free. Performance can be hampered by large volumes of email messages in any of the inbox folders. If you save sent messages in the Sent folder, consider moving these from the Inbox to the Email List. You may either move them automatically when sent, or periodically move them manually. To remove messages from your Sent manually, open each message and uncheck the Show on Inbox button. Leave show on Email List checked. To delete messages from the sent box in a batch, tag the messages to delete and select Process, Delete Records. *Caution: Deleting messages from the Sent box will also delete the message from the Email List.*

Other folders. If you have created separate folders in your Inbox for various storing messages by category (Bar Association, Sales Offers, Newsletters, etc.), you should set these items to go to the Email List when read. Create Quick Tabs on your Email List to categorize them.

Attachments: When you save an email attachment, the attachment remains part of the Time Matters database. There is no need to preserve the attachment in two places! So, after saving it, delete it from the email message. Time Matters 6 automatically creates a link between the message, and the attachment when the attachment is saved with TMSave. With version 5, you can connect attachments to emails by assigning a document number during the TMSave process and entering the number on the email form.

Private Email. There are a couple of approaches to keeping private emails private, while keeping you inbox free. You could check the Private box, and save the message to the Email List. The email would is now viewable only by you. *Caution: The Private records feature must be set up in security first! It does not help to check the Private box until this is done.* Another approach is to create a private matter, and associate the emails with that matter.   ❄

Personal Injury Template for Time Matters

Out of the Box Template gets you up and running with Time Matters

Out of the Box Developers has released a comprehensive Personal Injury Practice Template for use with Time Matters. This template contains custom data entry forms, codes and reports to get you up and running with Time Matters faster and more effectively. The template comes with two hours of orientation with an OTB consultant. Call me for details, or go to www.otb-dev.com.   ✿

☎ **Call Me First** ☎

Installing new computers? Don't risk data loss or unnecessary down time. Call me at least one week in advance before moving or reinstalling your Timeslips or Time Matters programs or data to new computers. **313-223-1200**

Changing Billing Rates in Timeslips

Timeslips 9 and higher supports up to 20 billing rates per source

First, remember that there are 3 sources for billing rates in Timeslips: Timekeeper, Client and Activity. Before attempting to change billing rates, examine the default rate source for the clients(s) you wish to change. Open Client Information, go to the Rates panel. You will find the default rate source in the lower right corner of this window with the label "When no rules apply, default to source."

If the source is **Timekeeper**, you will need to adjust the Timekeeper rates. Go to the Timekeeper area and add a new rate for each timekeeper, using the same rate level slot for each timekeeper. Go back to Client Information and change the default **rate level** to the new rate level. The Rate Level drop-down is right next to the "When no rules apply" box. If there is a template showing in the box labeled "When these don't apply, use rules from," make any rate level changes to that template. If you do not have any unused rate levels available, you may change an existing rate level to reflect the new rate. The new slips will take on the new rate. Existing unbilled slips will keep their original rate, unless you elect to update them with the Update Rates wizard.

If your default rate source is **Client**, add a the new rate in the next available rate level slot on the rates panel of client information. Be sure to change the default rate source and level to Client, Level # where # is the rate slot for the new level.

If the default rate source is **Activity**, go to Activity Information and add new rate levels for the various activities. Be sure to return to client information and change the level number for the default rate.

How Timeslips rate sources work:

Timekeeper: Use when the work will be billed according to the billing rate of the person doing the work.

Client: Use when all work for a client will be billed at the same rate, without regard to the person doing the work.

Activity: Use when the client will be billed according to the type of work being done, without regard to the person doing the work.   ❄

Default rate source and level setting in Rates panel of Client Information

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☞ **Out of the Office** ✉

I will be out of the office from December 13-17.

Timeslips Basic Course - Half Day

November 16, 2004 — 9am - Noon

Covers:
- Entering Users, Clients, Tasks and References
- Setting up Default Billing Rates
- Entering Time and Expense Slips
- Creating Bills
- Posting Payments

Timeslips Intermediate Course - Full Day

November 17, 2004 — 9am - 4pm

Covers:
- Customizing Timeslips
- Setting up Client Information Templates
- Special Billing Arrangements
- Changing the Look of Your Bills
- Making Adjustments, Credits and Write-offs
- Reversing and Reprinting Bills
- Creating Reports

Cost: $195 for half-day classes   Discounts Available
$395 for full-day classes
Classes are held at Smart-Detroit, 1300 Penobscot Bldg., Detroit
For enrollment forms go to **www.absims.com/classes**

Time Matters Basic Course - Full Day

December 7 — 9am - 4pm

Covers:
- Entering Users and Staff
- Working with Cases/Projects, Contacts, Events, ToDos
- Working with Classification Codes
- Supporting Records Overview
- Communicating with Time Matters: TM Messenger, Phone Call Tracking, Email, Reports and Views

Billing Matters Basic Course - Full Day

December 8, 2004 — 9am - 4pm

Covers:
- Users and Staff
- Program Settings, Codes, and Bill Preferences
- Working with Cases/Projects
- Working with Contacts and Clients
- Time and Expense Entry Methods
- Navigation, Searching and Sorting
- Bills and Invoices
- Bill Flow Manager
- Reports
- Designing a Bill Layout

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FORWARDING SERVICE REQUESTED