

FROM ARITA'S DESK

A.B. CONSULTING

October 2002

www.absims.com

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Hello Detroit!

Downtown office puts me closer to most of you




A.B. Consulting moved to downtown Detroit on July 9. For me, this means walking access to downtown attractions like the beautiful, new *Ford Field*, and an endless assortment of cultural, entertainment and dining venues. It's been a great first three months! What this move means for those of you in or near downtown is a nearby source for the support and training services you need. Whether it's a phone call for upgrade advice or a full day of hands-on training, I'm here to serve you. Do you need to become a better Timeslips user? Sign up for one of my regularly scheduled Timeslips classes held at Smart-Detroit. The first classes at this state-of-the-art office and conference suite were held last month. The classes follow the "Timeslips University" curriculum. We cover the Basic Training Guide on the first (half) day, and the Intermediate Training Guide on the second (full) day. I also provide supplementary materials and an opportunity for "class choice" exercises. The next classes meet on October 24-25 (see insert). Want to see how Time Matters case/project management software can boost efficiency in your office? Give me a call for a free one-hour consultation. (A mileage charge may apply for firms outside the downtown area.) A downtown Detroit Time Matters user group is also forming, with meetings at Smart-Detroit at a time to be announced. Do you need a better understanding of Microsoft Word? Call me for a personalized training session on Word 97, 2000 or XP. Do you need to automate document production in your office? Contact me for help with merges, macros and document assembly software for Word and WordPerfect. Do you just want to go to Greektown for lunch? That can be arranged, too!

Still serving the rest of Michigan

This move does not mean an end to my services for firms outside the metro area. I will continue to travel throughout Michigan (and beyond) as always.

Telephone numbers and phone support

The Ann Arbor line remains the same: 734-973-2708. The Albion phone and fax numbers are no longer in use. Please call 313-223-1200 and send faxes to 313-223-1202. Most calls are returned the same day. It is best to schedule a conference call appointment if possible for product support issues. You may also email questions to me at arita@absims.com. Most emailed questions are answered within 24 hours. 

Document Management with Time Matters

Where did I save that document? Use Time Matters document management and never ask that question again.

How would you like to open a client's file and see a list of all the documents prepared for the client, and sublists by type of document? How would you like to have that file, and those of all of your firm's clients available right on your computer screen? You can do it with Time Matters.

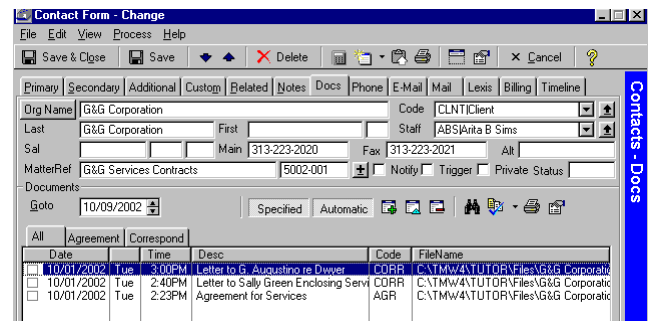


Figure 1 - All documents for client

Today I opened a file for G&G Corporation in my sample data set and created three documents for G&G. By saving these documents in Word with the TMSave button, I have these neatly sorted lists. (See Figures 1 through 3).

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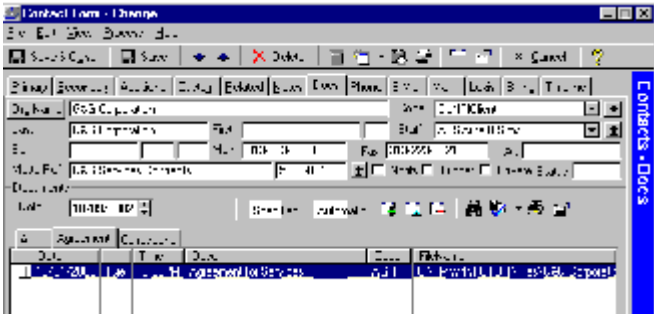


Figure 2 - Agreement sublist for client

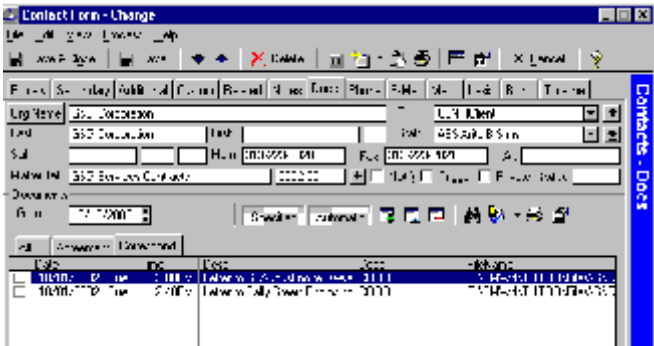


Figure 3 - Correspondence sublist for client

Let's back up and see how I accomplished these lists.

Start and end in your word processor

First, I created a document in Word, and clicked on the TMSave button to save the document. Time Matters (version 4.0 and higher) adds this button to your Word or WordPerfect toolbar when it installs. TMSave pops up the Time Matters document form shown on Figure 4. Here, I entered a code, a name for the document (Desc), and the client, using the lookup list to pick the client. Time Matters adds the rest. The File Name box is automatically filled in with the path and file name where it will

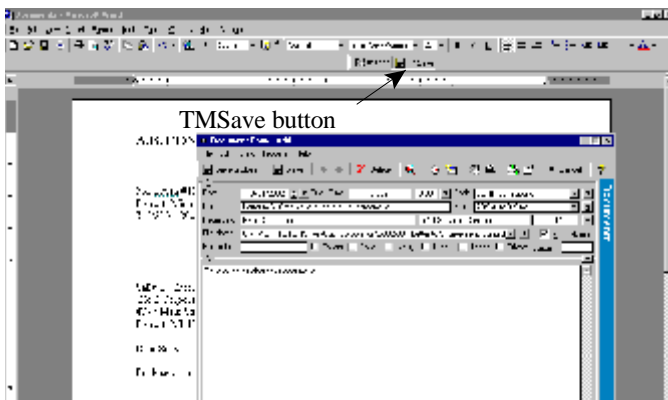


Figure 4 - Saving a Document with TMSave

save the document, according to my rules. In this example, the file is saved in a subfolder bearing the client's name in my

Tutor\Files folder. TMSave creates a new folder for the new client. Notice that the document form pops up right on the Word document screen. Save & Close removes the document form from the screen. *I never have to leave Word to save the document in Time Matters.*

Retrieving documents

Stop clicking around in folders to hunt for your documents in Word or WordPerfect File Open screens. You can quickly retrieve any file saved with TMSave right from Time Matters. Right-click on a document from a sublist to open, view, print, fax or email it. You can still get to your documents the old way,

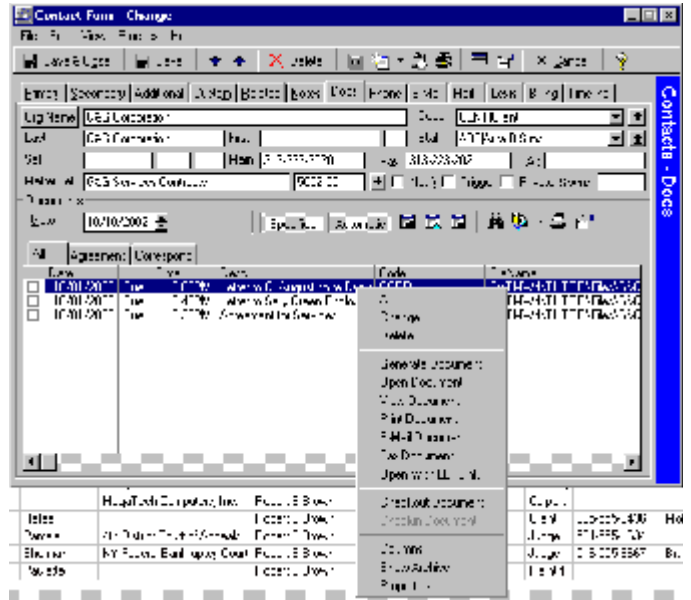


Figure 5 - Options for working with TMSaved documents

whether saved with TMSave or not. Unlike other document management programs, you are not restricted to one way of accessing your documents, and the documents have the file names that you assign, not cryptic or numerical file names.

Main document list and document search

Use the main document list to retrieve documents based on author, type or other criteria without regard to client. Use Time Matters Document Search to search files based on contents, using connectors such as AND and OR and proximity formulas. (See Figure 6 on the next page.)

What about Existing Documents?

Time Matters offers a drag and drop interface for getting entire folders of documents onto the Time Matters documents list. The interface lets you enter defaults for author, client, matter and document type, as appropriate, to speed up the record creation process. Since getting started is so easy, why not put this time-saving, organizational tool to work for you now?

Time Matters Competitive Upgrade Sale Continues

Now through December 31, 2002, if you have one of these products can order Time Matters for 20% off:

GoldMine	Interface	Act!
AbacusLaw	Amicus Attorney	ProLaw
Outlook with Exchange Server		

Spotlight on Timeslips Reports: Payment Register



Third installment of step-by-step report articles covers the steps for listing payments in Timeslips

Report Contents: The payment register is a Transaction Listing showing only the transactions with the type: Payment.

Timeslips 9.x/10.x/11 steps

- Open the Report Menu (CTRL+R) and click the A/R Transactions tab.
- Highlight Payment Register (Figure 7)
- Enter the desired date range for payments in the date box below.

If Payment Register is not on the list, use the New button on the report menu toolbar to start the Add Report Wizard and add the A/R Transaction Listing report to your list. Edit the filters to select Transaction type: Payment. (Figure 8).

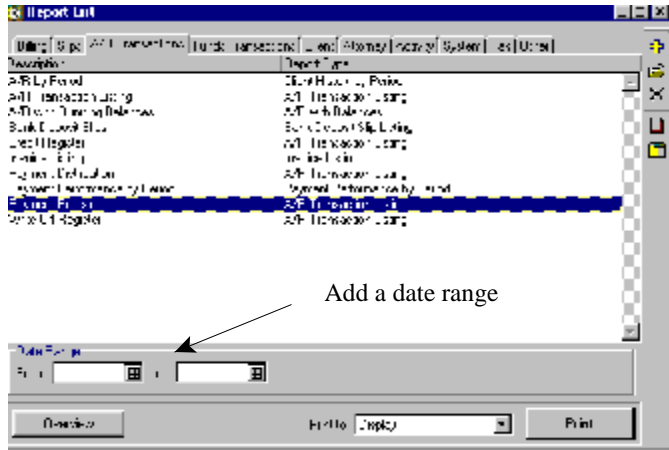


Figure 7 - A/R Transactions Report List

To change the format of the report, double click the report and select the Formats tab. For a report in the style shown in

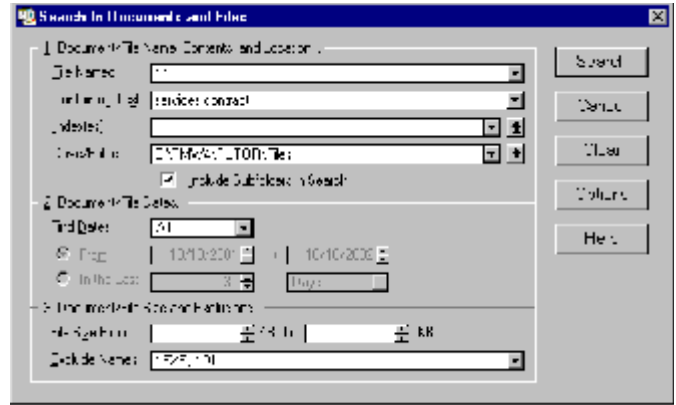


Figure 6 - Time Matters Document Search

Figure 9 on the next page, select Report Style: Data entry format, and set Gap after each record style to None.

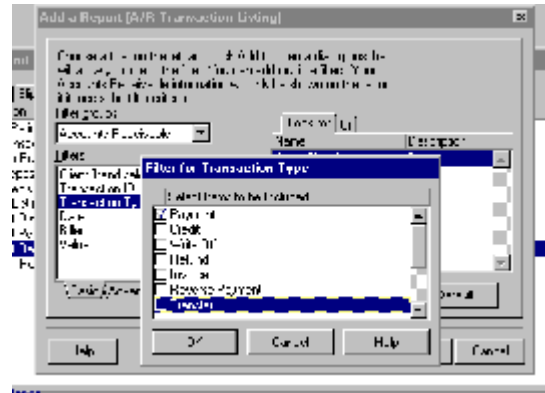


Figure 8 - Payments only filter

Timeslips 7/8 steps

- Select Reports, Client, Transaction Listing.
- Click the Select button and enter the desired date range.
- Click the Types button and uncheck all transaction types except Payment.

Funds considerations

Timeslips 9 and higher. You cannot include deposits to client funds accounts in your payments register. You will need to create a separate Funds transactions report. Payments from client funds are automatically included as payments in the payments register.

Timeslips 7/8. To include funds payments in your payment register, in the Type selection check Payment to Account and Deposit to Account. To include amounts transferred from client funds to pay accounts receivable, check Payment from Funds.

11/11/02
10:34 AM

Wills & Henderson LLP
Payment Register

Page 1

Selection Criteria

Acc. Classification Open
Acc. transaction Payment
Acc. Date 9/1/02 - 10/31/02

Date	Type	Client	Description	Value
9/20/02	PAY	Atlantic	Payment: Thank You.. Check No. 125	(100.00)
9/29/02	PAY	Bishop	Payment: - Thank You.. Check No. 234	(2,079.94)
10/1/02	PAY	Luckersmith	Payment: - Thank You.. Check No. 214	(1,141.60)
10/2/02	PAY	Seacoast Marine	Payment: Thank You.. Check No. 234	(736.75)
Grand Total Payment				(4,058.29)

Figure 9 - Timeslips Payment Register

Step by step instructions for this Timeslips report inside

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FORWARDING SERVICE REQUESTED

