

Tips and Tricks
LexisNexis® Time Matters® 9.0 / Billing Matters 9.0 / PCLaw 9.2a

Presented by:



Time Matters:

- T Shift+Click on Icon - To add a new record without inheriting from underlying record.
- T TM Insider for Letter Signatures - Create Contact and Matter Formattable Clipboards with your standard signature to insert into correspondence.
- T Enhanced Global Search - Add Search Entry icon to Toolbar
- T CTRL+F - Search for text on any list
- T QuickTabs - Filter Matters by Matter Number, by case type, by staff
- T User Defined Form Records - examples: Cast Members, Trademark Management, Client Expenses
- T TM Save Web records as PDFs - Can save web searches as web records and then convert to PDF as document record.
- T Form Tabs - e.g. Not Done ToDos under Matter record
- T Email Fields - link email fields on Matter Form under Memo section
- T New Calendar Icon - combines Daily, Weekly and Monthly in single icon

Billing Matters:

- T Print to Excel
- T Balances and Funds Quicktab
- T Bill Flow Manager - print through preview bills with \$0 and no new activity

PCLaw:

- T QuickStep Customization
- T Saved Reports
- T Bill Memo

Time Matters User Group Meeting Presented by:

Carol Schlein – Law Office Systems – 973-746-6454 – carol@losinc.com

Carie Anne Sperazza – Law Office Systems – 631-615-5097 – carie@losinc.com