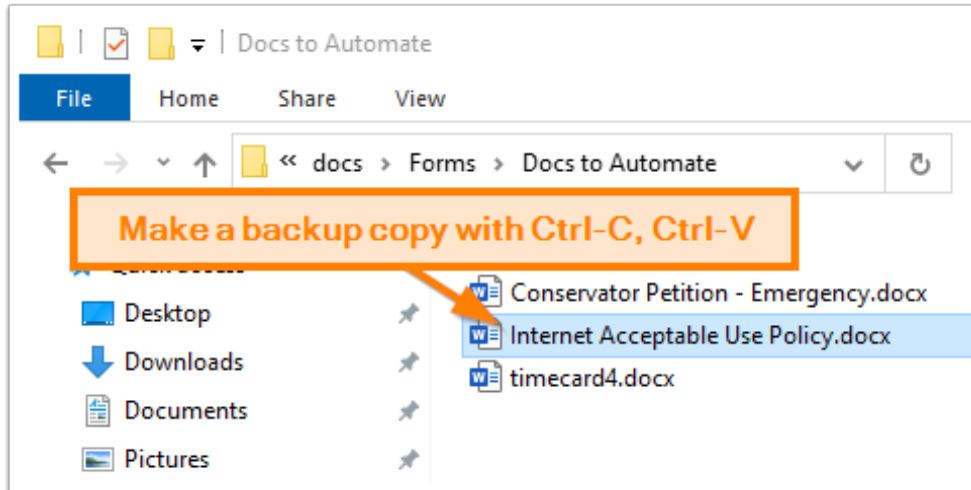
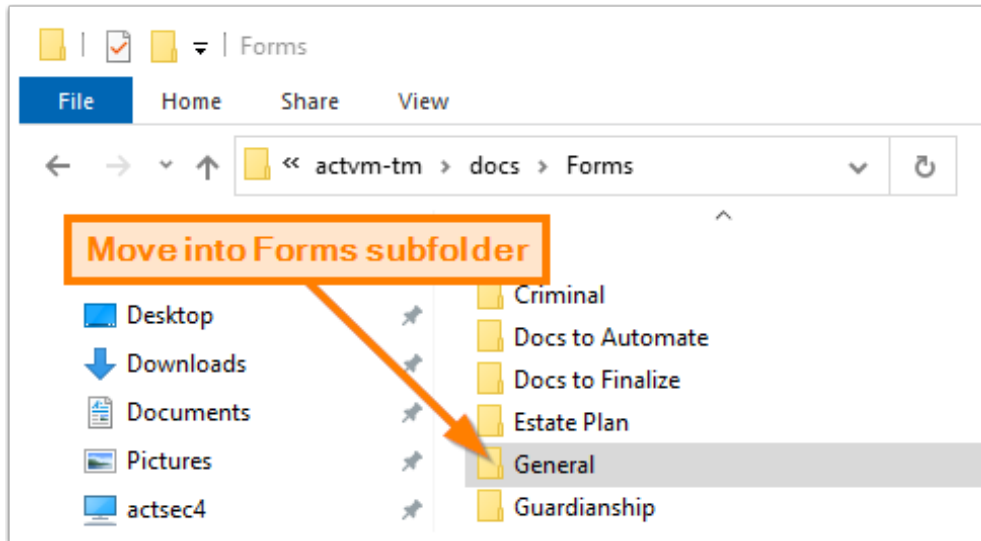


Starting with a copy of an existing document, these instructions show you how to create a Time Matters Merge Template. Merge Templates are used to create new documents by automatically inserting names and other information from Time Matters records into a Word document.

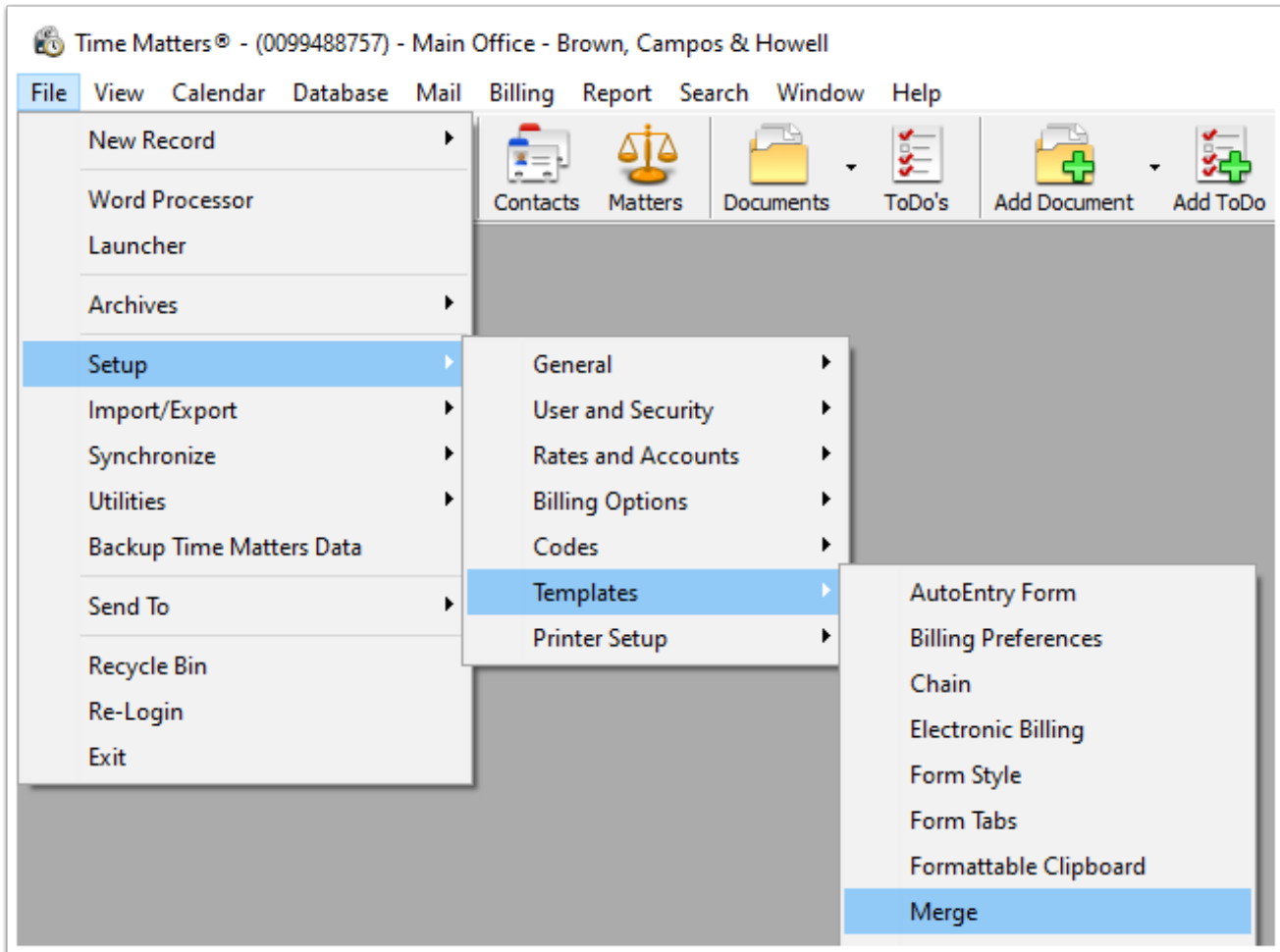
Make a backup of the document



Move the document into a Forms folder for Merge Templates

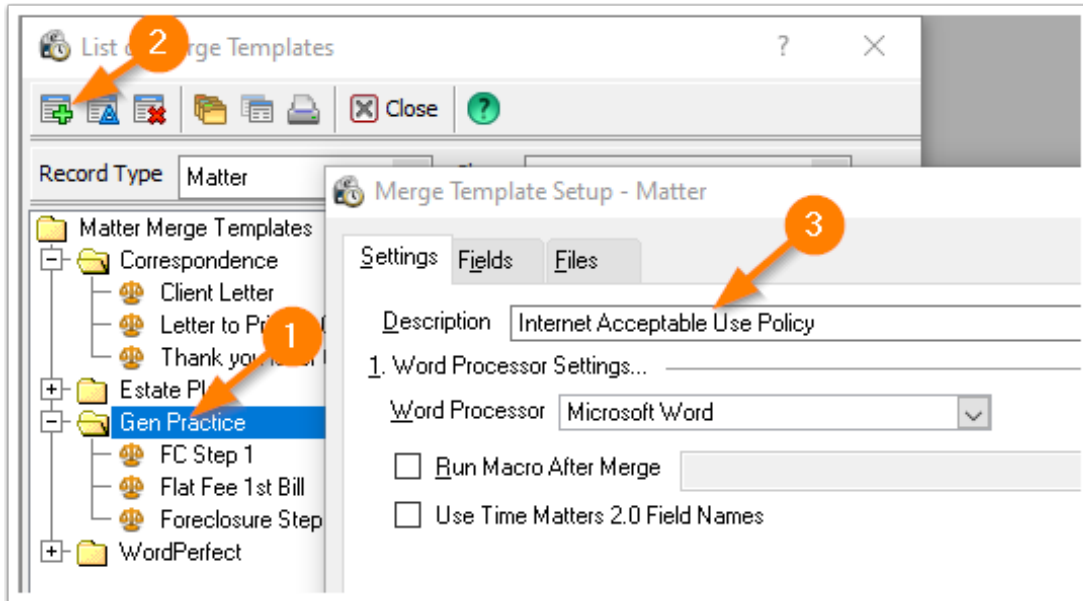


Go to Merge Templates in Time Matters



Start the Merge Template

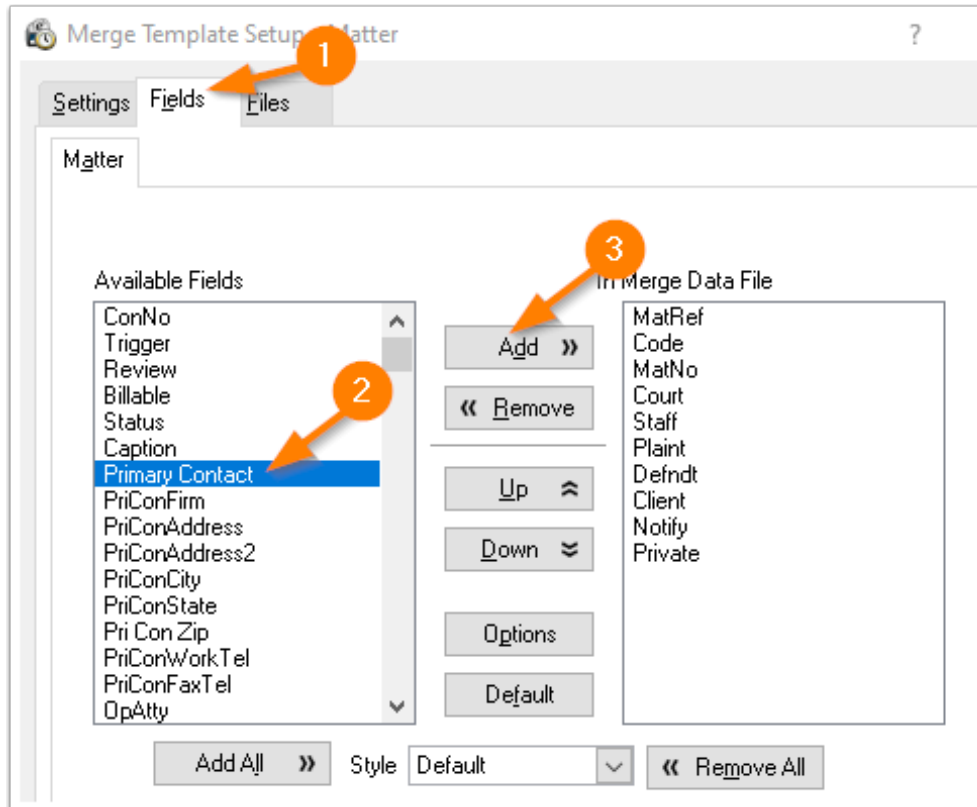
1. Choose a Folder in the List of Merge Templates
2. Add a record (green plus icon)
3. Enter the Description (name of document)



On the Fields tab, add fields

1. Click Fields tab.
2. Click any Field.
3. Click Add.

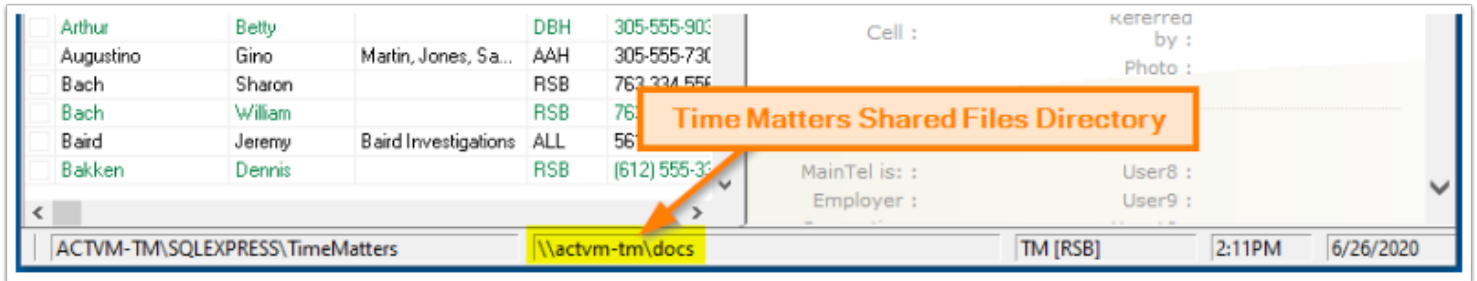
Include all the address fields and other fields that may be needed in the document.



Find the Time Matters Shared Files Directory

Find the Time Matters Shared Files Directory. It is shown in the bottom bar of Time Matters.

We recommend replacing the Shared Files Directory with the & character in the next window where you enter file names.

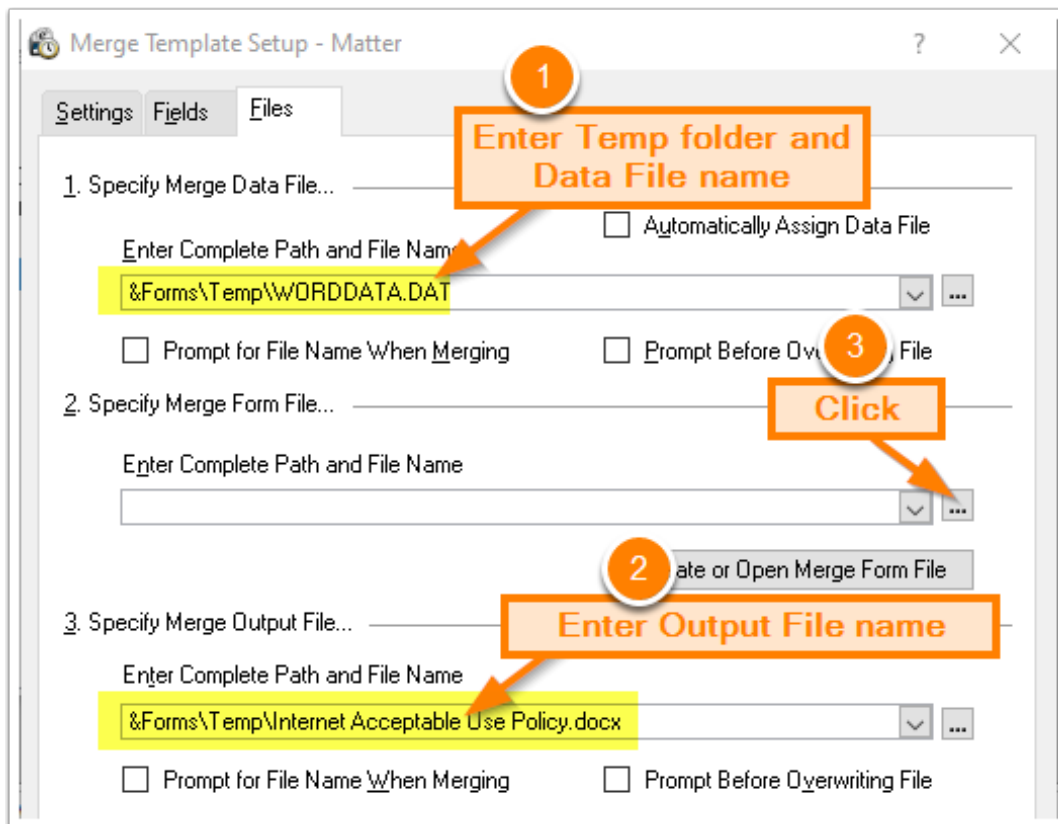


Fill in the Data File name and Output File name

Part of the challenge of creating and managing Merge Templates is organizing the files into folders. You may use whatever folders you like. These instructions show one approach: Using a Forms folder inside the Time Matters Shared Files Directory. Keep your folders and files organized and use them consistently.

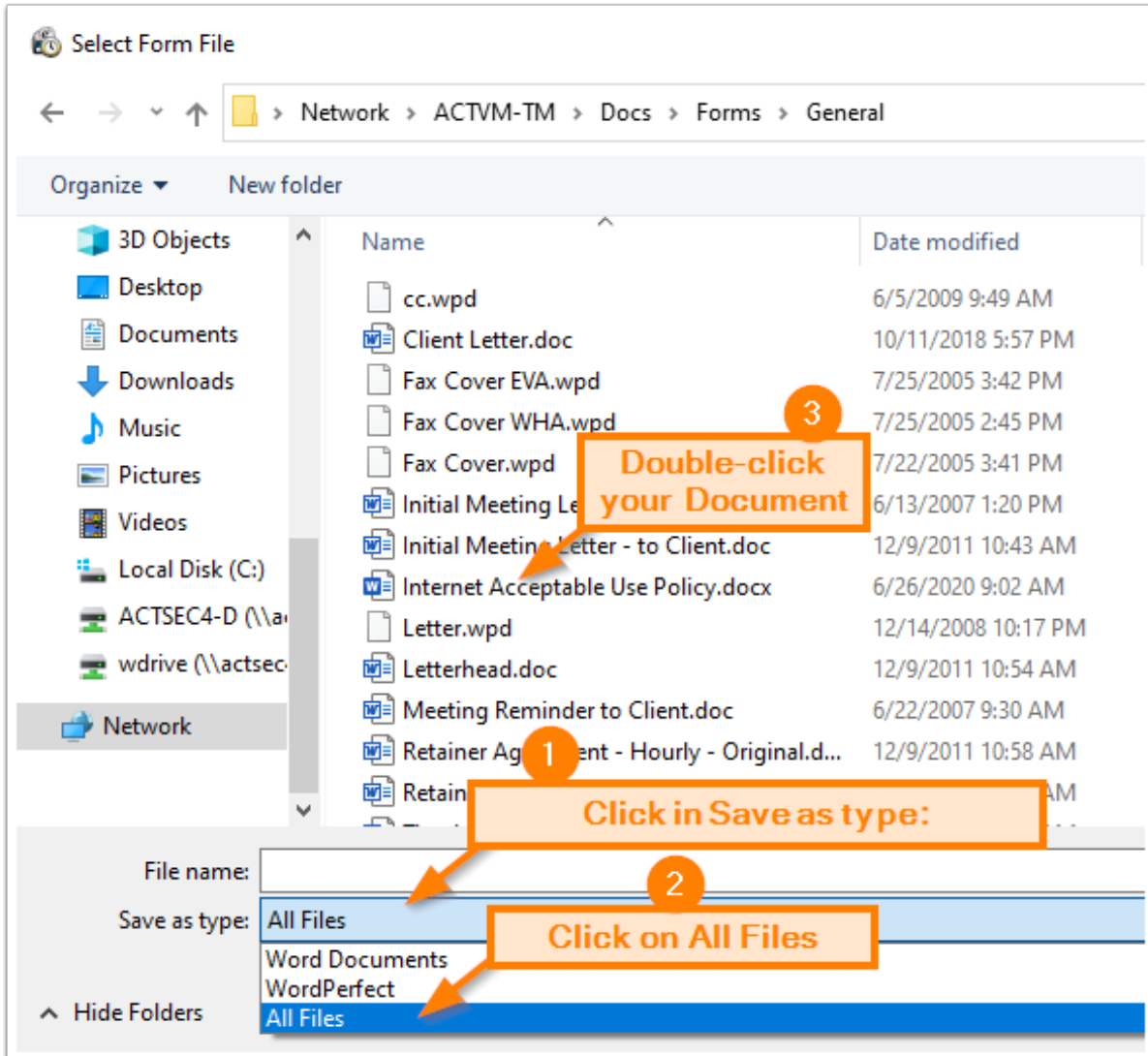
We recommend using folders within the Time Matters Shared Files Directory. Replace the Shared Files Directory with the & character in the file name fields.

1. Type in the Merge Data File name. Enter the & followed by a Temp folder.
Note: In our example, the Time Matters Shared Files Directory is \\actvm-tm\docs. The **Forms** folder is located inside of it. The **Temp** folder is inside the **Forms** folder.
2. Enter the & and the Temp folder followed by the Document Name in the **Merge Output File** field.
3. For the **Merge Form File** name, click the [...] lookup button.



Select the form document

1. Click the **Save as type** drop-down.
2. Click on **All Files**.
3. Double-click on your form document.

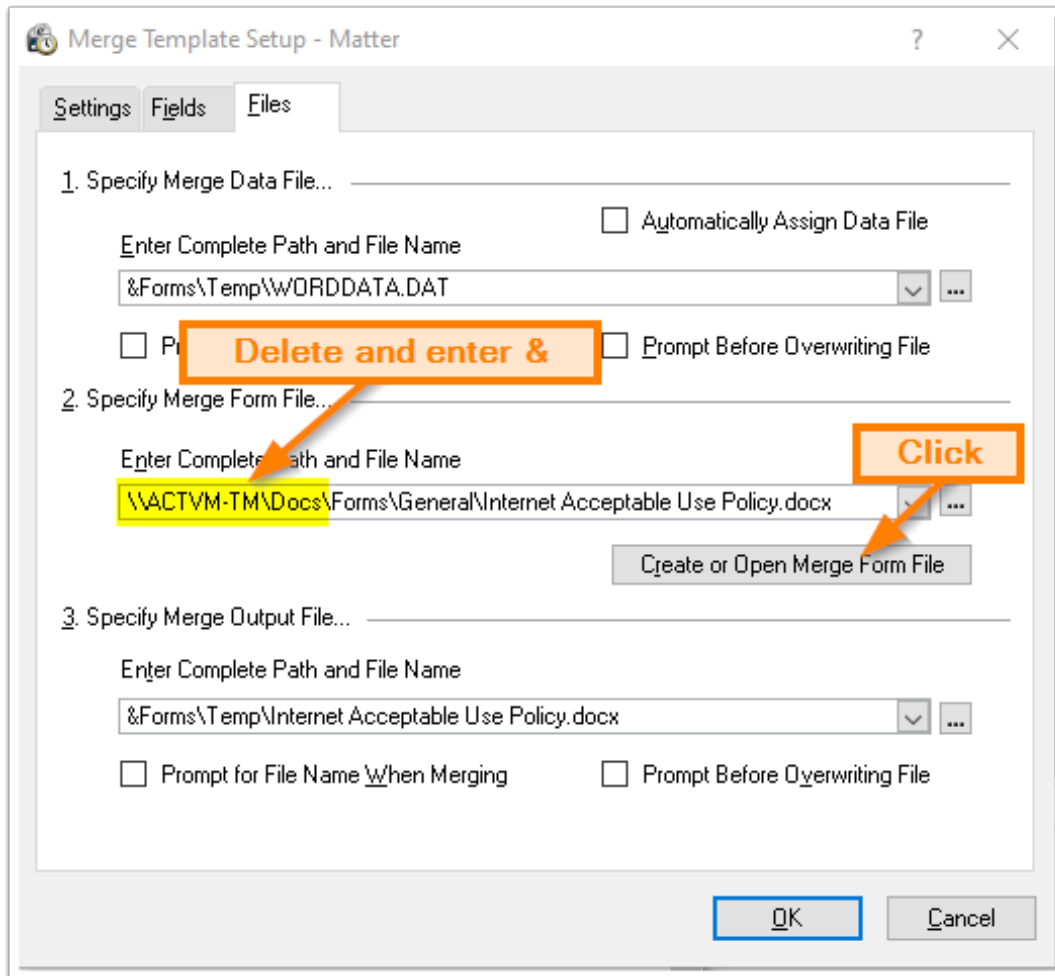


Replace the Shared Files Directory text with &

Replace the Shared Files Directory part of the field with &.

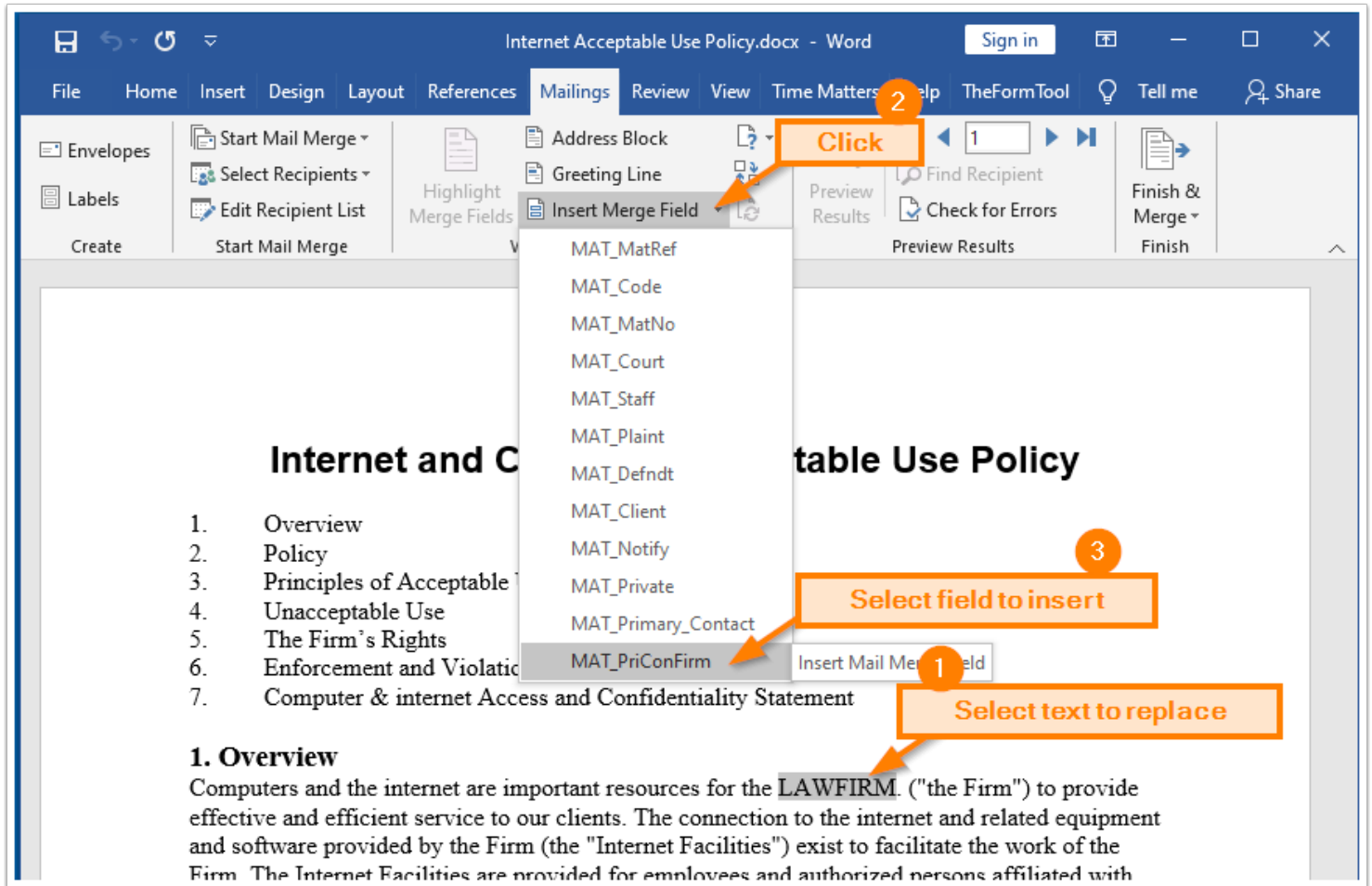
Click the button, **Create or Open Merge form File**

If there are any errors in the three file name fields or if the form document is still open, you will see an error message.



Replace text with fields

1. Double-click text you want to replace with a field, such as the Firm Name.
2. Click the drop-down button next to **Insert Merge Field**.
3. Choose a field to insert, replacing the selected text.



Fields added to the Merge Form file appear highlighted

Each Merge field will appear highlighted in gray in MS Word. (There is an option in Word to enable or disable this highlighting.)

Save and Close the Word document.

Internet and Computer Acceptable Use Policy

1. Overview
2. Policy
3. Principles of Acceptable Use
4. Unacceptable Use
5. The Firm's Rights
6. Enforcement and Violations
7. Computer & internet Access and Confidentiality Statement

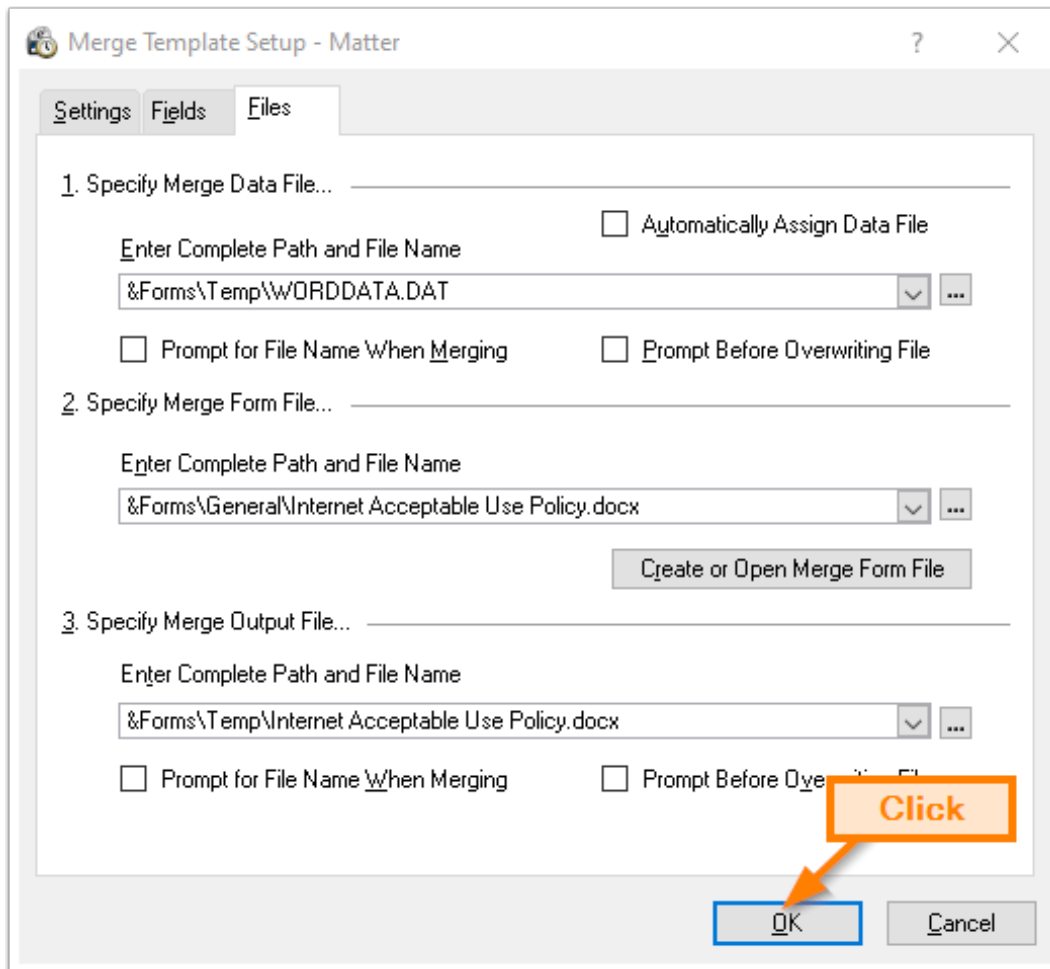
Text is replaced with a gray Merge Field

1. Overview

Computers and the internet are important resources for the «MAT_PriConFirm». ("the Firm") to provide effective and efficient business operations. The connection to the internet and related equipment and services ("Internet Facilities") exist to facilitate the work of the Firm. The Internet Facilities are provided for employees and authorized persons

Save and Close the document

Close the Merge Template record in Time Matters



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