Save time and improve consistency when creating new documents with Time Matters

AutoEntry Form Time-Savers

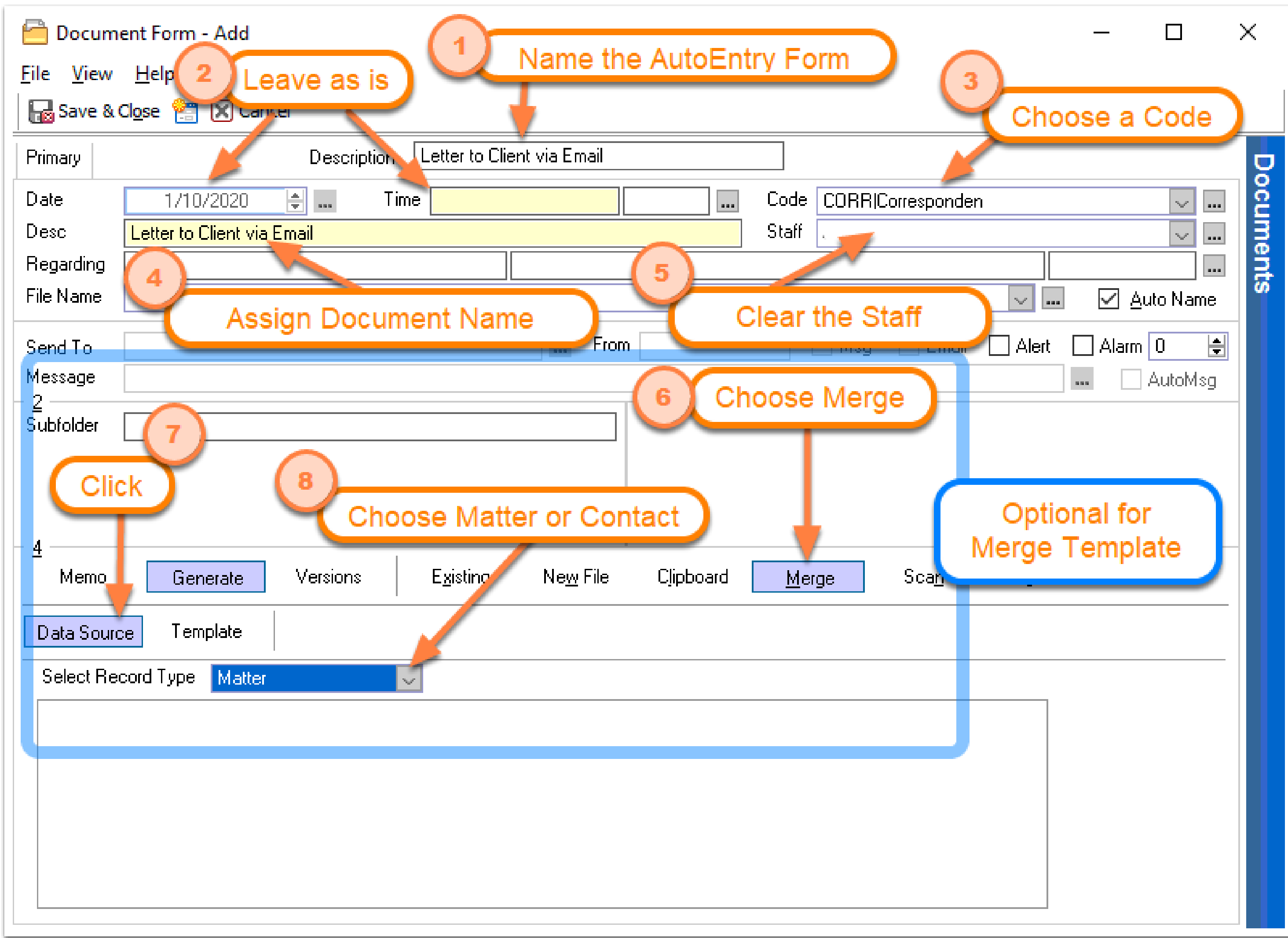
AutoEntry Forms save time for new documents by:

- Assigning Classification Codes
- Saving them in the correct folders
- Optionally using a Document Template such as Letterhead or Pleadings
- Optionally using a Merge Temple to fill in variables such as Regarding Line, File Number, and Via Email
- Optionally insert the Signer's Name and Title

Start an AutoEntry Form

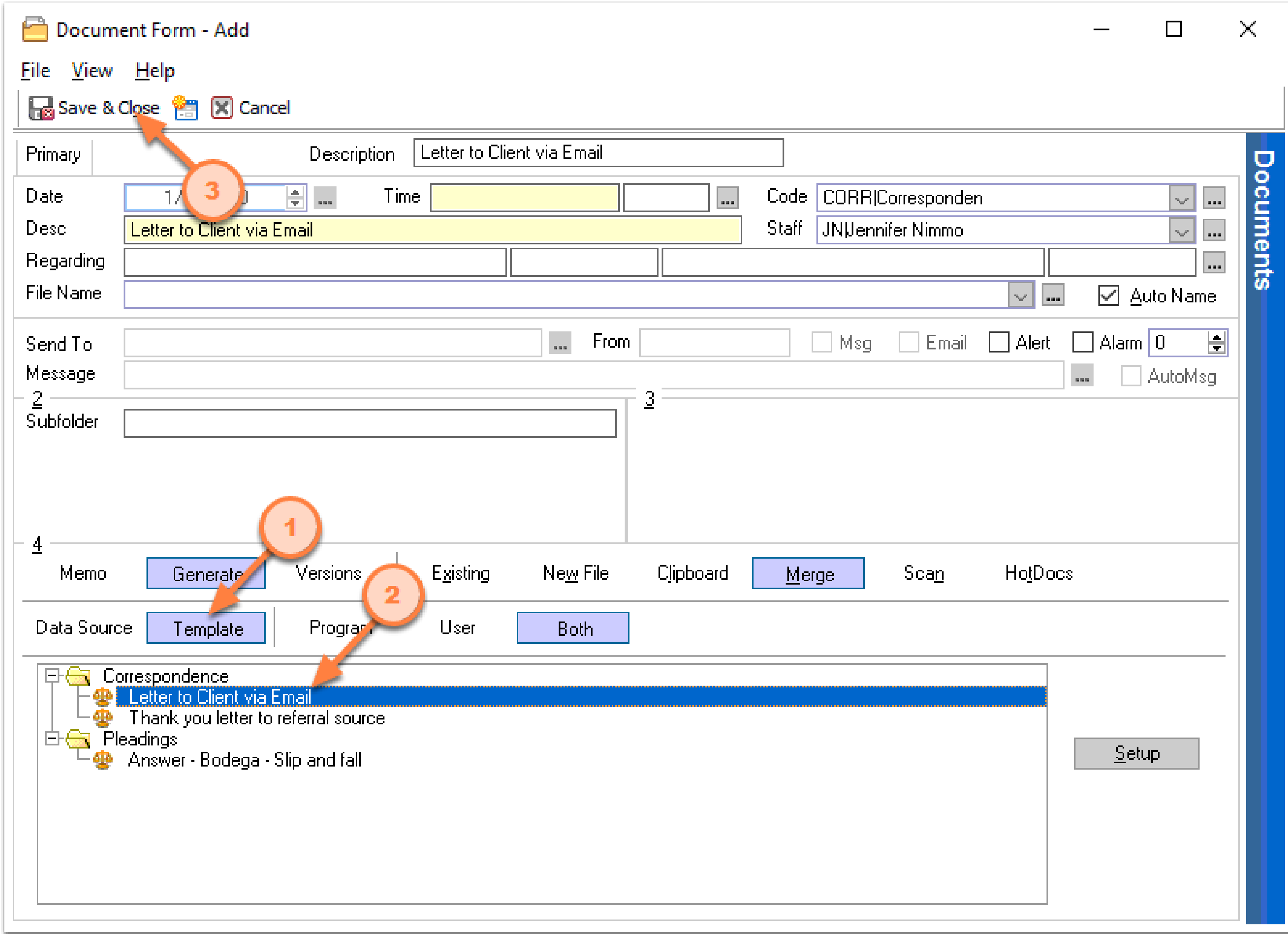
Go to Main Menu | File | Setup | Templates | AutoEntry Form

1. Assign a descriptive name to the AutoEntry Form, typically the name of the document.
2. Leave the Date and Time Fields as they are, even if they are Required fields.
3. Choose a **Classification Code**, such as CORR for Correspondence.
4. In **Desc**, fill in the name of the document. You will be able to add to the name when creating a document.
5. Clear the **Staff** field.
   Optional for Merge Template:
6. Click the **Merge** button.
7. Click **Data Source.**
8. If filling the Document with variables from a Matter, choose Matter.



Choose a Merge Template and Save

1. Click on **Template**
2. Select the matching **Merge Template**
3. Click: **Save and Close**



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