

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.

The screenshot shows the 'Document Form - Add' window with the following callouts and annotations:

- 1 Name the AutoEntry Form:** Points to the 'Description' field containing 'Letter to Client via Email'.
- 2 Leave as is:** Points to the 'Date' field (1/10/2020) and 'Time' field.
- 3 Choose a Code:** Points to the 'Code' dropdown menu showing 'CORR|Corresponde'.
- 4 Assign Document Name:** Points to the 'Desc' field containing 'Letter to Client via Email'.
- 5 Clear the Staff:** Points to the 'Staff' field.
- 6 Choose Merge:** Points to the 'Merge' button in the bottom toolbar.
- 7 Click:** Points to the 'Data Source' button in the bottom toolbar.
- 8 Choose Matter or Contact:** Points to the 'Select Record Type' dropdown menu showing 'Matter'.

Additional annotations include:

- A blue box labeled 'Optional for Merge Template' surrounding the 'Merge' button and the 'Data Source' button.
- A blue box labeled 'Optional for Merge Template' surrounding the 'Select Record Type' dropdown menu.
- A vertical blue bar on the right side of the window labeled 'Documents'.

## Choose a Merge Template and Save

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

Document Form - Add

File View Help

Save & Close Cancel

Primary Description Letter to Client via Email

Date 1/1/00 Time Code CORR|Corresponden

Desc Letter to Client via Email Staff JN|Jennifer Nimmo

Regarding

File Name Auto Name

Send To From Msg Email Alert Alarm 0

Message AutoMsg

2 Subfolder 3

4 Memo Generate Versions Existing New File Clipboard Merge Scan HotDocs

Data Source Template Program User Both

Correspondence

- Letter to Client via Email
- Thank you letter to referral source

Pleadings

- Answer - Bodega - Slip and fall

Setup

## Author

Wells H. Anderson, J.D.

CEO – Active Practice LLC - [www.activepractice.com](http://www.activepractice.com)

Edina, Minnesota

952.922.1727 (direct) or 800.575.0007

Expert assistance with practice management applications

Time Matters Platinum Certified Partner