How to link a Matter Field to a Contacts Field

Customization of Contact Form

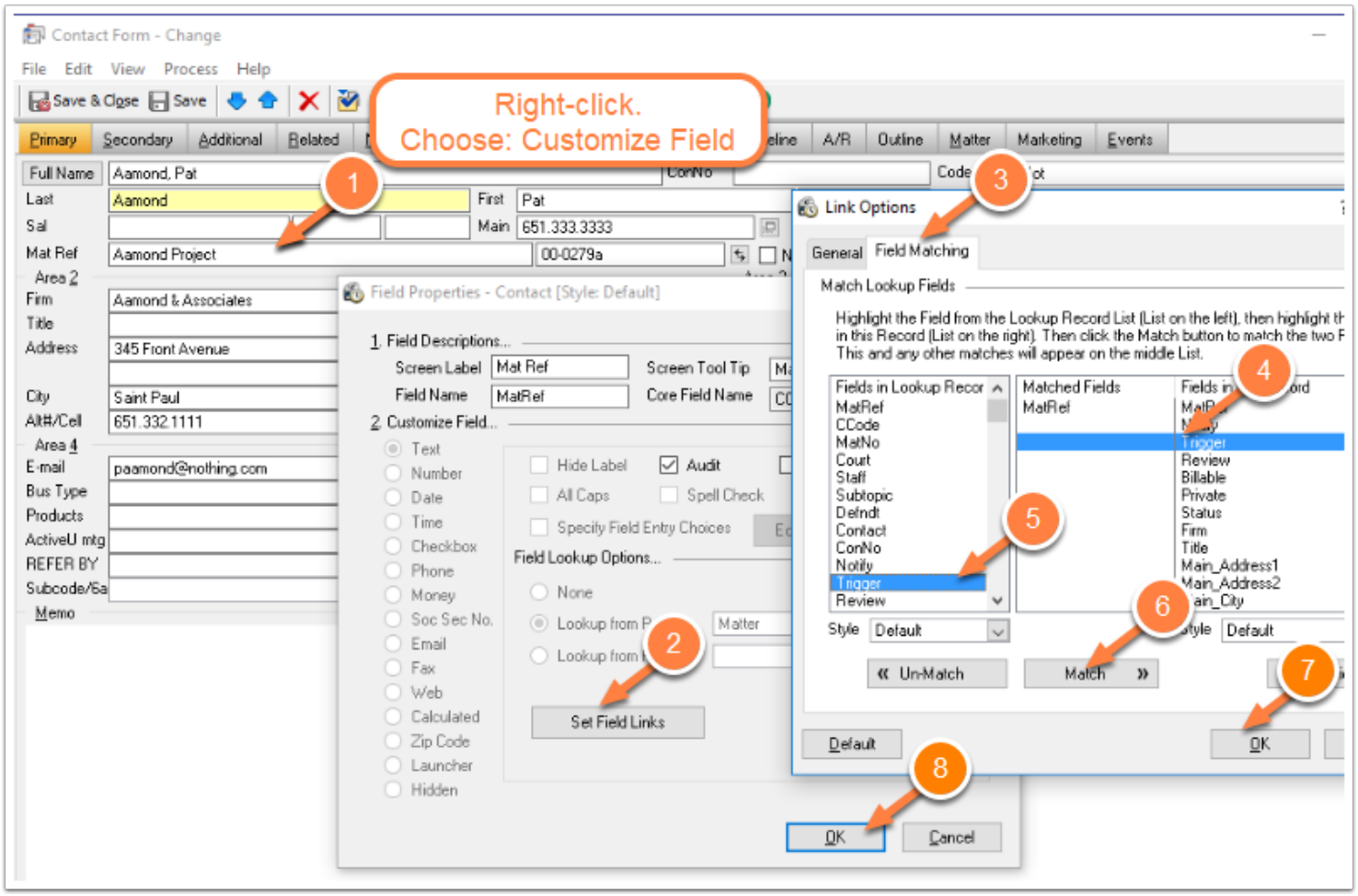
You may find it a time-saver to have one or more Matter fields appear in a client's Contact record. Field Matching in Time Matters allows this.

A field in a Matter needs to be matched to a field in the Contact Form. The automatic copying happens when the Matter field, in this example, Trigger, is manually changed in the Matter Form. If you are using Form Styles, you need to make these customizations in the File / Setup / Templates / Form Style settings of Time Matters.

In this example, the **Trigger box** of the Contact record will be checked if the **Trigger box** is clicked in the Matter field for the Aamond client and matter. The following eight steps customize the Mat Ref field of a Contact record to pull in the value of a field that is changed in the related Matter record.

Heads Up: While the copying will happen automatically if you manually change the field in the Matter record, it will not happen if you use the Main Menu / Process / Change Records feature.

Copy a Matter field to a Contact automatically



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