

**BUSINESS  
PRACTICE AREA TEMPLATE**

for Time Matters<sup>®</sup>/Total Practice  
Advantage<sup>®</sup>

By

IP ASSOCIATES, LLC

# Why do *you* need a Practice Template?

- *Tired of using the one size fits all setup that shipped with Time Matters?*
- *Frustrated that Time Matters isn't as easy to use as you expected?*
- *Concerned that a custom-tailored Time Matters configuration is too expensive and/or time consuming?*
- *Too busy practicing law to worry about designing and customizing software?*

# BUSINESS FORM

## Primary Tab

The Primary tab contains most of the key information about the case. Easily keep track of the current Stage of the case, key contacts related to the case via single-click lookups, key dates, referral source, and court information.

The screenshot shows the 'Matter Form - Change' application window. The 'Primary' tab is selected, and the form contains the following information:

- MatterRef:** Molina, Rafael Contract w/ Lexis
- Code:** \$BUSGen Business
- MatterNo:** 08-142
- Mat Type:** Consulting
- Staff:** MCC|Marilyn C Campos
- Stage:** (Empty)
- Update Dt:** 1/25/2010
- Client:** Rafael S. Molina
- 025:** (Empty)
- Notify:**
- Trigger:**
- Review:**
- Billable:**
- Private:**
- Status:** Open
- Caption:** (Empty)
- Primary/Billing Cont:**
  - Pri Contact:** Rafael S. Molina
  - Firm:** (Empty)
  - Address:** 14568 8th Street
  - Address 2:** Apt. 7A
  - City:** Miami
  - FL:** (Empty)
  - 33154:** (Empty)
  - Tel/Fax:** 305-555-1616
- Additional Contacts:**
  - Client 2:** Debra Mackenzie
  - Client 3:** (Empty)
  - Other 1:** (Empty)
  - Other 2:** (Empty)
- Links & Referral:**
  - Docs Folder:** Molina, Rafael\Lexis contract
  - Ref Src:** Word of Mouth
  - Ref | Arng:** Albright, Betty
- QuickFlow System:**
  - Common:** (Empty)
  - Docs Prep:** (Empty)
  - Cast:** (Empty)
  - Events, TDs:** (Empty)
  - Checklists:** (Empty)
- Key Dates & Info:**
  - Filing Date:** 1/25/2010
  - Exec Date:** 2/19/2010
- EIN | SID:** (Empty)
- SQL Date:** 1/25/2010

# BUSINESS FORM Secondary Tab

The screenshot shows a software window titled "Matter Form - Change". The window has a menu bar with "File", "Edit", "View", "Process", and "Help". Below the menu bar is a toolbar with icons for "Save & Close", "Save", "Print", "Cancel", and a green circular icon. The main area of the window is divided into several tabs: "Primary", "Secondary", "Additional", "Related", "Notes", "Documents", "Phone", "Email", "Mail", "Lexis", "Billing", "Timeline", "AR", and "Outline". The "Secondary" tab is currently selected. The form contains the following fields and values:

MatterRef	Molina, Rafael Contract w/ Lexis	Code	\$BUSIGen Business
MatterNo	08-142	Mat Type	Consulting
Stage		Staff	MCC Marilyn C Campos
Client	Rafael S. Molina	Update Dt	1/25/2010
	025	Notify	<input type="checkbox"/>
		Trigger	<input type="checkbox"/>
		Review	<input type="checkbox"/>
		Billable	<input type="checkbox"/>
		Private	<input type="checkbox"/>
		Status	Open

On the right side of the form, there is a large, empty text area labeled "Memo". A vertical label "Matters - Secondary" is positioned to the right of the memo field.

The Secondary tab leaves you plenty of room to add your own fields and includes a large free form Memo field to input the details of the incident giving rise to the case, a strategy for winning the case, and/or details of injuries to your client.

# BUSINESS FORM

## Additional Tab

The Additional tab contains plenty of space to add your own unique fields.

The case closure area provides key reporting data and storage info for easy retrieval of paper files in the future.

The screenshot shows a software window titled "Matter Form - Change" with a menu bar (File, Edit, View, Process, Help) and a toolbar. The "Additional" tab is selected among several other tabs. The form contains the following fields:

MatterRef	Molina, Rafael Contract w/ Lexis	Code	\$BUSIGen Business
MatterNo	08-142	Mat Type	Consulting
Stage		Update Dt	1/25/2010
Client	Rafael S. Molina	025	
		Notify	<input type="checkbox"/>
		Trigger	<input type="checkbox"/>
		Review	<input type="checkbox"/>
		Billable	<input type="checkbox"/>
		Private	<input type="checkbox"/>
		Status	Open

Below the main form area, there is a "Closure Info" section with the following fields:

Closure Info	
Close Date	1/25/2010
Imaged?	Yes
Destroy	1/25/2010
Loc   Bin	No

A vertical sidebar on the right side of the window is labeled "Matters - Additional".

# CRITICAL INFORMATION AT A GLANCE

- Tired of looking in too many places for your critical case information?
  - IP Associates unique Power Views look inside the Case for you and pull out the most critical information in one easy to understand view
  - Get quick access to all case documents, tasks that are yet to be completed, negotiations with the other side, and more – it's easy to stay on top of each case as it progresses!
  - Nearly two dozen custom Power Views are included with the Litigation Practice Area Template

# BUSINESS CASE SYNOPSIS

The Business Case Synopsis Power View displays the most critical information in one easy to read screen. All of the key contacts are displayed along with easy links back to the full Contact record. Key case data is only a click away!

**Looking for a phone number?** It's here.

**Need to send an email?** Just click on the email link on the Power View.

Molina, Rafael Contract w/ Lexis (08-142)
Code: \$BUS  
Staff: MCC

Print

**QuickFlow -- Click Item to Add**

<a href="#">Delegated ToDo</a>	<a href="#">Case History Note</a>	<a href="#">Negotiation Note</a>	<a href="#">Case Alert</a>
<a href="#">Client Letter Fax</a>	<a href="#">Pri.Con. Letter Fax</a>	<a href="#">Cast Letter Fax</a>	

**Key Contacts**

Code	Name	Main	Email
	<a href="#">Betty Albright</a>	312.555.8989	
CLNT	<a href="#">Rafael S. Molina</a>	305-555-1616	
ATTY,TRUS	<a href="#">Debra Mackenzie</a>	789.456.1230	<a href="mailto:jeff@ipassoc.com">jeff@ipassoc.com</a>

**Cast Members**

Cast Name	Role on Matter	Main Tel

**Matter Info**

Filing Date	1/25/2010	Client 2	Debra Mackenzie
Exec Date	2/19/2010	Agent	
nu		EIN   SID	

**Memo**

# ADDITIONAL POWER VIEWS

Other Power Views that greatly increase productivity for a Litigation practice are:

- Docs – All: Shows all documents linked to the case, with one click access to the actual file. “Documents” can include evidentiary photos, scanned pleadings, deposition transcripts – anything that can be saved as a file!
- Docs Due Back: View a list of any documents for which you expect a response but have not been answered
- Events-ToDos: Easily see all of calendar and task records, with highlighting for ToDos not yet done!
- Negotiations Summary: See every negotiation phone call and get a complete picture of the offers and demands to date.



# SERVICE LIST VIEW

The Service List Power View makes it easy and fast to print a current service list for inclusion with court documents. No need to continuously update a word processing document when attorneys are added or removed from a case. You'll always have the most up-to-date contact info as well!

## Service List

**Able v. State of Florida**  
**Court No.: 07 FL1234**

Carolyn Meeks  
Brody Law Firm  
11890 Old Dixie Highway Suite 890  
West Palm Beach, FL 33401  
Tel:561-555-4543  
Fax:561-555-4898  
*Attorney for Defendant Jones*

Walter S. Pierce  
Law Offices of Walter Pierce  
105 East Ponce de Leon Ave.  
Minneapolis, MN 67439  
Tel:612-555-3367  
Fax:612-555-3409  
*Attorney for Defendant Florida DOT*

# CAST MEMBERS

- Having trouble keeping track of everyone involved in the case?
  - Cast Member records provide a place to record each person's role in a case
  - Ever need to see how a judge ruled in previous cases you've had? Cast records allow you to track and find this easily!
  - Want to see how many times you've used an expert witness and what their opinions were on previous cases? Again, Cast records to the rescue!

# “EXPERT” CAST MEMBER

This Expert record is an example of Cast Member. It tracks this expert's unique relationship to this case. Has the expert issued a report? Have they been deposed by us? Who's side are they on? What was their opinion/diagnosis?

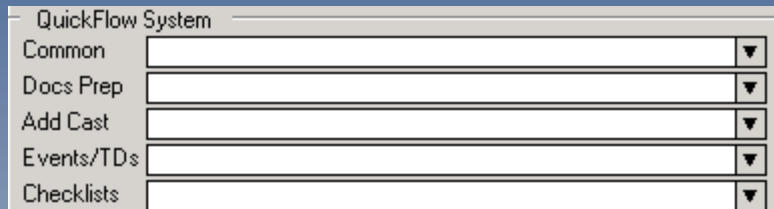
The screenshot shows a software window titled "Cast Form - Change" with a menu bar (File, Edit, View, Process, Help) and a toolbar. The form is divided into several sections:

- Primary / Related / Notes**: Navigation tabs.
- Date**: 2/02/2008, Sat, Time: 2:54pm, Code: .EXPIExpert.
- Description**: Expert for Defense regarding amputations.
- Regarding**: Able v. State of Florida, 07-1255, Barry B. Able, 001.
- Reminders**: Follow, Done, Notify, Trigger, Review, Private, Status.
- Physical Address**:
  - Name: Gino Augustino
  - Contact: Martin, Jones, Sawyer, et al.
  - Address: 500 N. Krome Avenue
  - City: Homestead, FL, 33030
  - Tel/Fax: 305-555-7309, 305-555-4562
  - Additional Info: Email
- Treatment/Testimony**:
  - Who's Side: Adverse - Defense
  - Specialty: Amputations
  - Report: Yes
  - Depo: Yes, 7/09/2007
- Records Info**: Dr. Augustino contends that the right foot of Barry was so severely damaged that it had to be amputated immediately and was done so to save his entire leg.

# WORKFLOW & AUTOMATION

- Too many clicks and too much typing to perform one simple task?
  - Our QuickFlow System provides quick and easy access to commonly performed tasks, like creation of letters, delegating ToDos, adding Cast Members, and creating checklists – all in one easy-to-access place!
  - QuickFlow creates records in seconds, not minutes.
  - Less typing = More production
  - Automation = Consistency & speed

# QUICKFLOW SYSTEM



QuickFlow System

Common	▼
Docs Prep	▼
Add Cast	▼
Events/TDs	▼
Checklists	▼

The QuickFlow System Area provides access to commonly performed, often repetitious, functions. With QuickFlow, they are performed faster, with fewer clicks and with less typing.

## **The Business QuickFlow does all of the following, and more:**

**Common** – Performs common functions like delegating a ToDo, adding a negotiation phone call, and creating standard letters and faxes.

**Docs Prep** – Draft a variety of useful documents, such as medical records requests, letters to opposing counsel, etc. Your own templates are easily added to the list.

**Cast** – Add Cast Members records to the case such as Experts, Attorneys, etc.

# COMMON FEATURES OF IP ASSOCIATES TEMPLATES

Every Practice Template includes a number of standard features, including:

- Document management, tracking and auto-naming system
- ToDo Delegation system
- Over two dozen custom Power Views
- Quick Tabs that aid in filtering and tracking of records
- A common look and feel to the matter/case forms
- The QuickFlow System for automation of common tasks

To see a discussion of all the common features to our templates, please browse to the “Common Features to Our Templates” PDF on our site, or visit [www.ipassoc.com/commonfeatures.htm](http://www.ipassoc.com/commonfeatures.htm). These features are key components and significantly enhance the usefulness of our templates.

# PRICING

- Pricing is based on the number of TM/PA user licenses
- Licensing one-to-one with TM/PA users
- \$400 for the 1<sup>st</sup> TM user license
- \$75 for each additional user license
- Multiple template purchases provide discounts on each additional template; *Example, if 5 Practice Areas with 10 TM licenses \$2,000 for 1<sup>st</sup> user (5 x \$400) + \$75 x 9 additional users = \$2,675.00*

# HOW TO ORDER

- Through your local Certified Independent Consultant (CIC)
- Online at [www.ipassoc.com/domesticorder.htm](http://www.ipassoc.com/domesticorder.htm)
- If ordering more than one template, go to [www.ipassoc.com/practicetemplatesorder.htm](http://www.ipassoc.com/practicetemplatesorder.htm)
- Call 888-732-9071
- Download order form and fax to 866-258-9062



# FOR MORE INFORMATION

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