

# PracticeMaster Timer Quick Guide



Tabs3 Billing



PracticeMaster



Trust Accounting



Accounts Payable




General Ledger

## **PracticeMaster Timer Quick Guide**

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# Quick Guide to PracticeMaster's Timer Window

This Quick Guide will show you just how simple it is to use PracticeMaster's Timer window. When used regularly, you will find it to be an essential tool for tracking, reviewing, and billing your time.

## Getting Started

In the Quick Launch, search for and select "Timer."



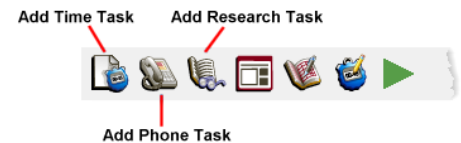
The screenshot shows the PracticeMaster Timer window. At the top, there's a title bar with the text "2:13:23, Klein/Daniel P., Klein vs. Simmons Construction". Below the title bar is a toolbar with icons for adding tasks. The main area is a table with columns: Start Date, Start Time, Time, Type, Client ID, Client Name, Work Description, Contact, and Description. The table contains three rows of data.

Start Date	Start Time	Time	Type	Client ID	Client Name	Work Description	Contact	Description
08/23/2024	09:04 AM	2:13:23	Pho...	120.01	Klein/Daniel P.	Klein vs. Simmons Constr...		Conversation with cou...
08/23/2024	08:26 AM	0:37:10	Timer	102.00	Gilbert/Andrew C.	Auto Accident		Prepare case brief
08/23/2024	01:03 PM	0:12:28	Timer	1.00	Administrative Acc...	For tracking all Firm and i...	Prudential Financial ...	Reconciling Prudential...

The Timer window, as shown above, displays all Time, Phone, and Research tasks for your User ID. This makes it extremely easy to track the time you spend on specific tasks. The Timer window toolbar provides quick access to the most commonly used functions of the Timer window.





## Tracking your Time

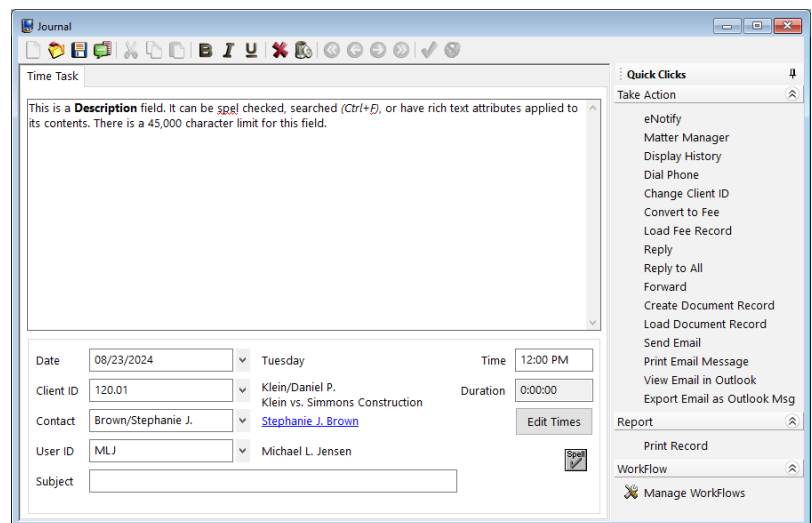
Tracking your time is accomplished by starting Time, Phone, or Research tasks within the Timer window. As shown here, the first three buttons of the Timer window toolbar are used to start these tasks. The following section explains how to start multiple tasks, and how to switch between them.



## Starting a Task

A common task for any attorney is preparing a case brief; tracking the time to perform this task is simple.

1. Click the  button to add a new Time Task to the Timer window.
2. Click the  button to start the timer.
3. Double-clicking the task itself will open the timer record and allow you to edit the Description field, assign a Client ID, and assign a contact. This is demonstrated in the figure above.
4. Click the  button to save your modifications and return to the Timer window.
5. The timer will continue to run until you click the  button on the Timer window toolbar.






The screenshot shows the PracticeMaster Timer window with a task record open. The task is titled "Time Task". The description field is empty. The Date is 08/23/2024, Tuesday, at 12:00 PM. The Client ID is 120.01, Klein/Daniel P., Klein vs. Simmons Construction. The Contact is Brown/Stephanie J., Stephanie J. Brown. The User ID is MLJ, Michael L. Jensen. The Subject field is empty. The Duration is 0:00:00. The toolbar at the top includes buttons for adding tasks, starting the timer, and saving. The right sidebar shows a list of Quick Clicks and a Report section.

You can use any application on your computer without affecting the timer, thereby letting you time almost any activity throughout your day.


## Starting Another Task

While preparing your case brief, suppose you receive a phone call from another client and would like to record the detail of that call. No problem!

1. While in the Timer window, click the  button on the toolbar. This will automatically stop the timer for your current task and start a new Phone Task timer. A window similar to the one shown here will open.
2. Enter a Client ID in the Client ID field. You may also want to use the Description field to record any notes during your conversation with the client.
3. At any point you can save the record by clicking the , which will return you to the Timer window screen without stopping the timer.
4. Once the phone call is complete, stop the timer by clicking the  button.



**Note:** Double-clicking a task will open a Journal window, allowing you to edit information regarding that record.

## Starting a Task Using the Dialer

You can also use the PracticeMaster Dialer to start a timer record. While in the Client or Contact file, click the  button next to any phone number or any phone number in the SnapShot pane. This opens the PracticeMaster Dialer window allowing you to automatically start a timer.

Start Date	Start Time	Time	Type
08/23/2024	01:05 PM	0:43:36	Research
08/23/2024	09:04 AM	2:13:22	Timer
08/23/2024	08:26 AM	0:37:10	Phone

## Switching Tasks


Now that your phone call is finished, you can continue preparing your case brief. Switching tasks in the Timer window requires just a single click of the mouse! While in the Timer window, click the  button to the far left of the task you want to resume. This is demonstrated in the figure to the left. Any other task currently running will stop, and the  button of the task you selected

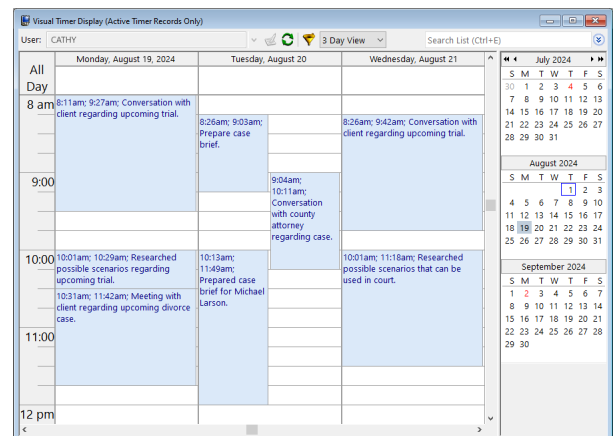
will change to a  button, indicating that the timer has resumed.

## Reviewing your Time

Reviewing your time is an important step before billing. This section explains how to use the Visual Timer Display and how to edit a timer record.

### Visual Timer Display

While in the Timer window, click the  button to open the Visual Timer Display. The Visual Timer Display looks very much like the Daily Calendar; however, it displays just your unbilled timer records. This can be useful for reviewing your timer records, identifying erroneous timer records, and locating missing time that has not yet been added to PracticeMaster.



## Editing a Timer Record

Forgetting to stop a timer is an easy mistake to make, but one that is clearly recognizable on the Visual Timer Display. Correcting such a mistake is just as easy!




1. In the Visual Timer Display, double-click the timer record you want to edit.
2. Once the timer record opens, click the **Edit Times** button as shown in the figure on the left. This will open the Edit Times window, which displays multiple start and stop times for a task.

Enter the correct End Time and click **Save**.

3.

4. Click the  button to save your changes and return to the Visual Timer Display.

**Note:** You can also edit timer records directly from the Timer window. Just select the record in question and click the  button to open the Edit Times window.

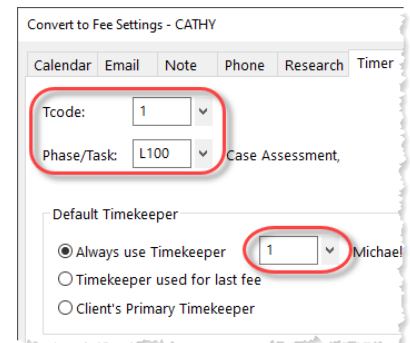
## Billing your Time

The ultimate benefit of using PracticeMaster's Timer window to record your daily tasks is that your timer records can easily be converted to fees. This is done through the Process Timer Records window.

### Convert to Fee Settings



Before billing your time, you should first set the default Tcode and Timekeeper. This only needs to be set up once.

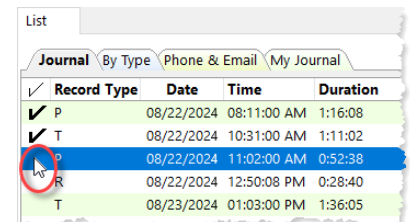
1. In the Quick Launch, search for and select "Convert to Fee Settings."
2. In the **Tcode** field, enter the tcode number that you want used as the default when converting timer records to fees.
3. In the **Timekeeper** field, enter your timekeeper number.
4. Update the **Tcode** and **Default Timekeeper** settings for each of the other tabs in the Convert to Fee Settings window.
5. Click **OK**.



### Process Timer Records

Now we are ready to bill our timer records! In the Quick Launch, search for and select "Process Timer Records."

1. In the Process Timer Records window, click in the  column of the timer records you want to bill. This is demonstrated in the figure on the right.
2. Click the **Convert to Fee** button. This will open a Time to Fee window for each timer record you selected. If a Client ID was not already associated with the timer record, you will be prompted for one.
3. Review the fee information and make any necessary changes.
4. Click the  button.



PracticeMaster also lets you combine multiple timer records into a single fee. By substituting the **Combine to Fee** button in step two, the procedure above can be used to create a single fee from multiple timer records. This is particularly useful when several timer records are present for the same type of task, such as multiple phone conversations with the same client.

Also, the default setting of the Process Timer Records window displays all unbilled timer records for all users. Depending on the size of your firm, you may need to sort the list by User ID to see your records, or filter the list so it displays only your timer records.

**Note:** Once a timer record has been processed as a fee, it is no longer listed in the Timer window or on the Visual Timer Display. It is, however, still present as a Time Task in the Journal file.

## Advanced Topics

The following section discusses several advanced topics that may prove useful as you become more accustomed to PracticeMaster's Timer window.

### *Starting a New Time Task from the Matter Manager*

The Matter Manager also provides a convenient means of starting a new Time Task for a matter. As shown in the figure to the right, clicking the **Timer** button in the Matter Manager creates a new Time Task for that particular matter.

### *Automatically Opening the Timer Window*

As you become more familiar with the Timer window, you may prefer that it open automatically when PracticeMaster is started. This acts as a reminder to track your time throughout the day. Having the Timer window open automatically can be easily configured by adding a /TIMER startup option to your PracticeMaster shortcut as follows:



1. Right-click the desktop icon used to start PracticeMaster and select **Properties**.
2. On the **Shortcut** tab, enter the /TIMER option following the file name in the **Target** field. For example, if PracticeMaster is installed in the C:\Program Files (x86)\Tabs3 directory, you would enter the following in the **Target** field:

"C:\Program Files (x86)\TABS3\CM.EXE" /TIMER

3. Click **OK**.

### *Removing Completed Tasks from the Timer Window*

It's important to remember to process timer records on a regular basis, typically daily or weekly. Doing so will ensure your time is not left unbilled, and will eliminate completed tasks from the Timer window. You can also remove a completed timer record from the Timer window by selecting it by right-clicking and selecting **Remove Task** (or by pressing the Delete key). Clearing timer records in this manner does **not** remove them from the Journal file, allowing you to process them at your convenience. To add an existing timer record back into the Timer window, right-click the desired record in the Journal file and select **Show in Timer Window**.

**Note:** Although deleting timer records from the Timer window will not remove records from the Journal file, deleting timer records from the Process Timer Records window **does** remove the records from the Journal file.

### *Timer Preferences*

Timer Preferences can be accessed by right-clicking anywhere in the Timer window, and selecting **Preferences**. Here you can configure what actions occur when adding a new task. By default, creating a new Phone task automatically starts the timer and opens an Edit Timer Record window. If you prefer that Time and Research tasks also act this way, those settings can be configured here as well.

As you have seen, PracticeMaster's Timer window is an accessible tool that makes it extremely easy to track the time you spend performing specific tasks. As your use of the Timer window increases, so will your billable time. Unbilled time will no longer remain unaccounted for, making the Timer window an indispensable part of your daily routine.