

Automate Your Workflow with Time Matters®

How Classification Codes and Triggers Can Turn
Repetitive Steps into Built-in Workflow

The Easiest Time You Will Ever Get Back

Work smarter with automation.

You do not have to recreate predictable work by hand. When a task always requires the same next step, two features already built into Time Matters® can take that step for you.

Classification Codes and Triggers.

Your firm sets the criteria. Time Matters handles the rest.

It is a simple way to get time back, and a good starting point for discovering what else your software can already do for you.

How Would Our Firm Use This?

Let's say whenever your firm creates a new contact, you reach out with a welcome packet. If you were to add a specific code to the contact record, and save it, Time Matters will open a new ToDo record for you to update or assign.

You don't have to open a new record, because Time Matters does that for you.

The simple benefit, that Time Matters has opened the next record you need, often helps firms recognize underutilized features are like leaving money on the table. New, scalable advantages, such as taking the next steps to pre-populate fields in that new record, can transform optional features into clear necessities no firm should ignore.

Top 3 Benefits of Workflow Automation

1

Fewer Missed Steps, or Mistakes.

You do not have to rely on memory. The next step happens automatically, every time, instead of depending on someone to remember.

2

Predictable Results.

Your workflow becomes consistent.

Define the follow-up once, and Time Matters reuses it automatically whenever the same situation comes up again.

3

Nothing to Lose.

Your firm does not have to change how it works.

Customize the software to fit your existing workflow and terminology.

How it Works

Classification Codes

- Classification codes are used to categorize records. For example, you might use one kind of code to classify a contact record as an expert witness or use another code on an event record to indicate a certain type of meeting.
- Individual records can have up to five classification codes.
- Classification codes are optional, but they can improve searching, sorting, and reporting.
- They can also be linked to an AutoEntry form, so when the code is selected on a new record, Time Matters uses the selected AutoEntry form to complete some fields.
- Custom Classification Codes can be created, but Time Matters already contains pre-set groups of classification codes for various record types. Most firms are using them, just not to their fullest potential.

Triggers

- Triggers help automate tasks in Time Matters.
- A trigger can respond when a record is added, changed, deleted, archived, or when a field changes.
- Trigger actions can include adding a new record, archiving a record, changing a field, creating a schedule chain, sending a message, or even starting a program.
- Triggers can also be scoped so they fire only when selected conditions are met.
- Time Matters can limit trigger scope by classification code, staff, contact, matter, user, or logical combinations of those values.

See it in Action

STEP 1 Choose the kind of record you want to create.

Example: I want Time Matters to open a new ToDo record for me.

STEP 2 Create a clear customized classification code nobody else is using.

Example: If “TEST” is not already one of the existing Classification Codes for ToDo, then we will create that new code.

STEP 3 Create a trigger that will recognize the code and automate creating the record.

Example: Our trigger will fire when we create a new contact record that also includes “TEST” as a classification code.

STEP 4 Test by adding the new custom code to one record and confirm the result is the creation of another record.

Example: Save a new contact record that includes “TEST” as the classification code.

STEP 5 Collaborate and Refine before using real production codes, or before expanding any capabilities.

Example: Ensure everyone is aware of the change and expectations.

Sample Exercise: A Simple Example

This exercise walks you through creating a classification code and a trigger. You will then create a new contact record and watch Time Matters open a ToDo record for you automatically.

Once complete:

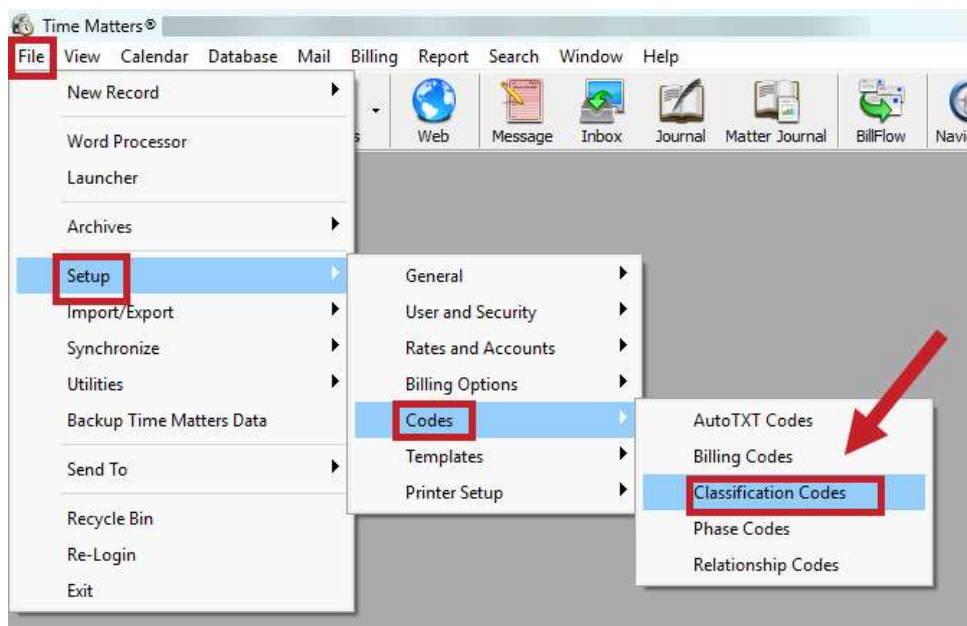
- Apply the same idea to your own day-to-day workflow.
- Remove the trigger or code at any time.
- Change the trigger to use a classification code you already use in live production.

Example:

Set up the two features, then save a new contact to watch the process work. Time Matters will create a new ToDo record, which you can update and save.

1 Create a Classification Code.

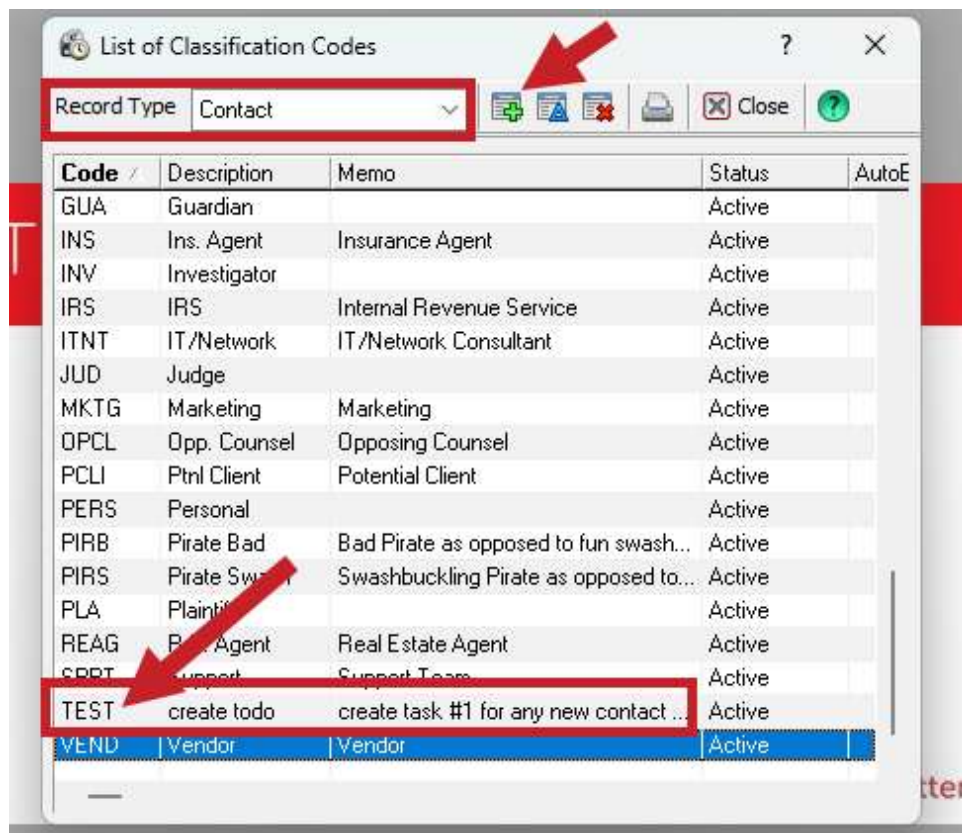
1. Navigate to File > Setup > Codes > Classification Codes



2. Select **Contact** as the **record type**
3. Click the **green plus sign** to **add a new code**. The Contact Classification Code Form will open.

Enter the following into the appropriate fields:

- **Code** – Enter “TEST”
- **Description** – Enter “Create ToDo”
- **Memo** – Outreach ToDo for Welcome



5. Leave other fields as-is. Click the **OK** button. The record will appear in the list.
6. Close the list.

Contact Classification Code Form

Code: Description: Memo:

AutoEntry

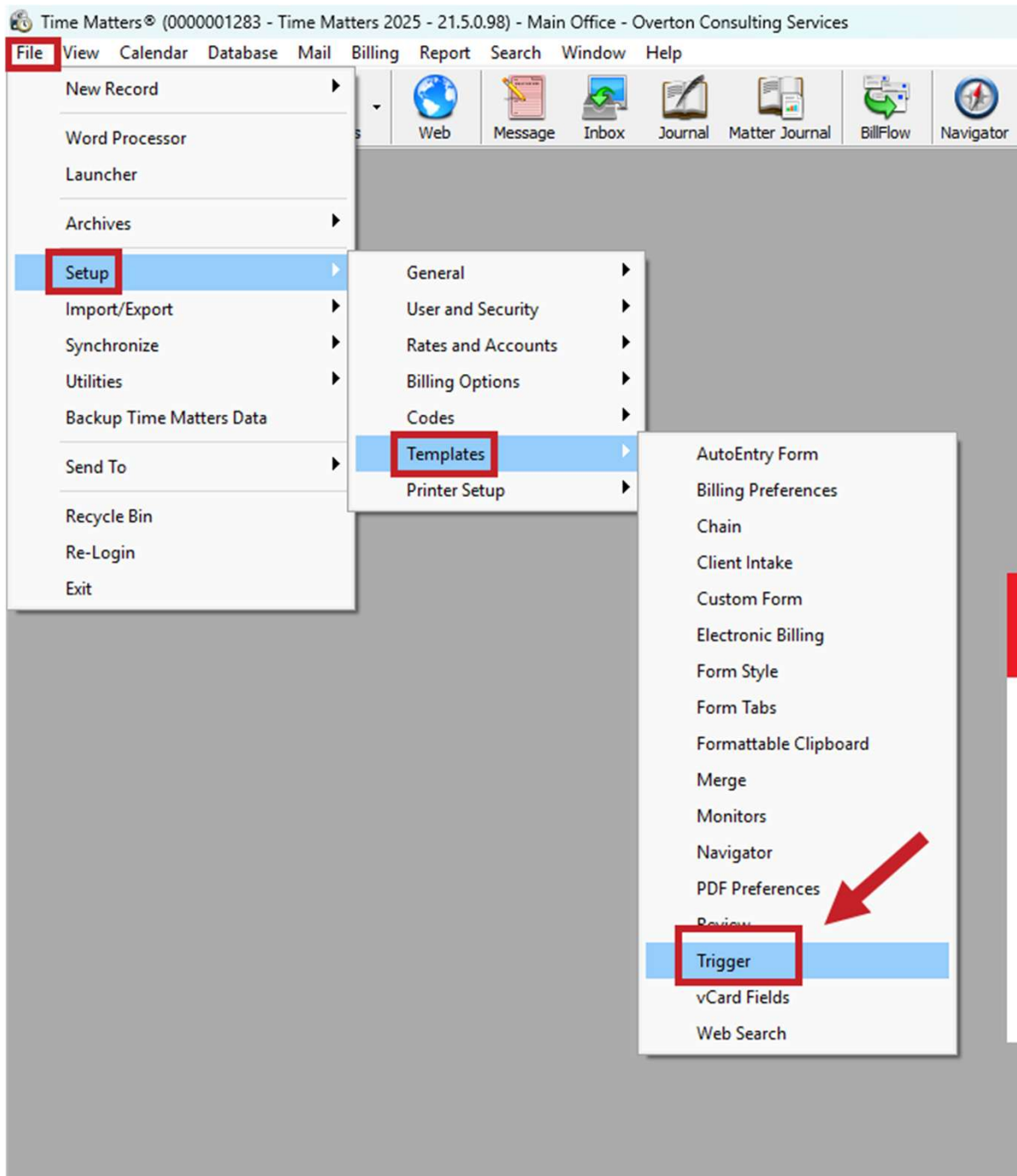
Code will have the following color: Classification Code Select

Use Form Style: Default Inactive Billable

OK Cancel

2 Create a trigger that fires when a new contact record is created that contains this new classification code.

1. Navigate to File > Setup > Templates > Trigger



2. Select **Contact** as the **record type**

3. Click the **green plus sign** to add a new code. The **Edit Trigger – Contact** window will open.

Make the following selections or updates to these fields:

- **Description** – Contact w TEST code creates ToDo
- **Fires When** – Record Added, Field Populated
- **Select Field** – Class Code
- **ANY Selected** – select this radio button
- **Code** – select your new TEST (Your new Classification Code)
- **Always** – Select this radio button

The screenshot shows the 'Edit Trigger - Contact' window with the following fields and options highlighted by red boxes:

- Description:** CONTACT w TEST code creates TODO
- Trigger:**
 - Fires When:** Record Added, Field Populated
 - Select Field:** Class Code
 - Labels for Style:** Default
- Scope:**
 - ANY Selected** (radio button selected)
 - Code:** TEST|create todo
- Active:**
 - Always** (radio button selected)
- Actions:**
 - Add New ToDo Record** (button highlighted)
 - Add** (button highlighted)
 - Change** (button)
 - Delete** (button)

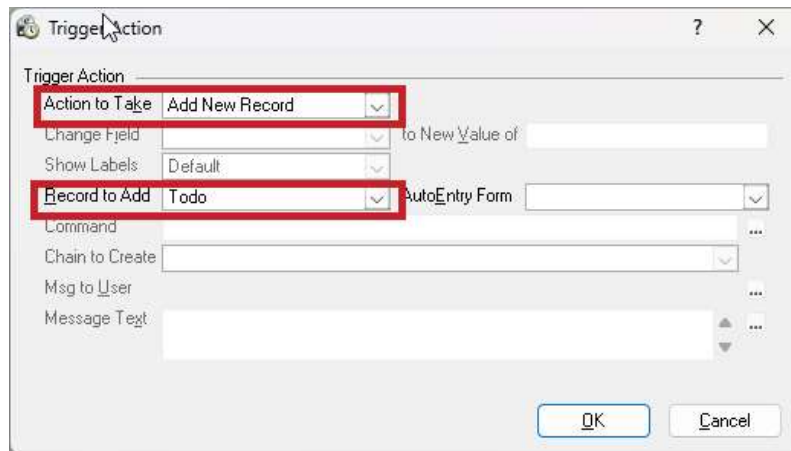
At the bottom of the window are **OK** and **Cancel** buttons.

Under the **Actions** section, click **Add**. The Trigger Action window will open.

- **Action to Take** – select Add a New Record
- **Record to Add** – select ToDo

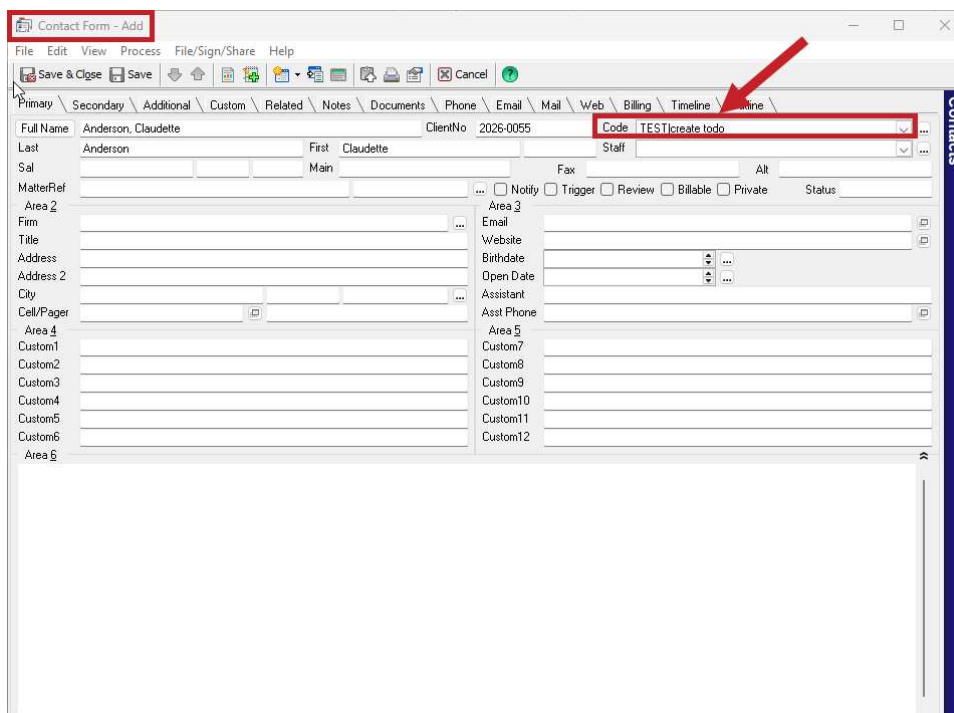
4. Click **OK**. The Trigger Action window will close.

5. Click the **OK button** on the Edit Trigger – Contact window to save and close.



3 Now, create a new Contact record.

1. Be sure to include your “TEST” Classification Code
2. Click Save & Close. A ToDo record will open for you.



4 Notice in your new ToDo record, which has opened:

1. The regarding field contains the name of the new contact you just created and saved.
2. You can update the ToDo record as you normally would.
3. Then click Save & Close.

The screenshot shows a software window titled "ToDo Form - Add". A red arrow points to the title bar. 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 help icon. The form is divided into several sections. The "Primary" section includes fields for "Date" (8/25/2026), "Priority", "Dur" (0:00:18), "Code", "Description", and "Staff". The "Regarding" field is highlighted with a red box and contains the text "Anderson, Claudette" and "2026-0055". Below this are checkboxes for "Follow", "Done", "Notify", "Hide", "Trigger", "Review", "Billable", and "Private". The form also has sections for "Area 2", "Area 3", "Area 4", "Area 5", and "Area 6", each with multiple input fields. A green vertical bar on the right side of the window is labeled "ToDo's".

Best Practices

Planning for Automation

Before getting started, take a few minutes to look at your firm's current workflow. The best opportunities are usually the small, repeated steps that someone must remember to do, the ones that depend on a person catching them rather than a system prompting them. If a task looks the same every time and someone must recall it from memory or a note, it is a strong candidate for automation. Use the questions below to help your team find where those opportunities are.

- Which tasks do we recreate by hand most often?
- Which follow-up steps are easy to miss when the day is busy?
- What needs the same next step every time?
- Which codes would make searching, sorting, or reporting easier for our team?
- Which workflow would be valuable enough to test first?

Keep it Working

Automation only stays useful if it stays organized. As your firm adds more codes and triggers over time, a quick periodic check keeps everything working the way you intended and keeps new staff able to follow the same process without confusion. A few habits below will help you get the most out of what you have set up.

- Review codes periodically. Report > File Reports > Feature Setup > Classification Codes
- Avoid creating several codes that mean nearly the same thing
- Keep a list of each trigger, its record type, when it fires, and what action it performs.
- Consider using the "Prompt Before Performing Action" option instead of "Always" if users should decide whether the trigger should run.
- P|T suggests being on the most recent version of software. Schedule your upgrade with Support, an AMP Membership Exclusive Benefit.
- For complex workflows involving triggers, scheduled chains, customizations, auto-entry forms, or training, contact P|T Professional Services.

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committed to you in the future*