

How to... Save Attachments With Email Records in Time Matters

Time Matters provides the option to save sent and received emails through Outlook. This can be invaluable in tracking activity on a case. However, if attachments are incorrectly saved, the database will experience what is called "Attachment Bloat".

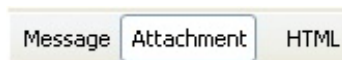
While Time Matters 10 does a better job of handling attachments, the fact remains that if the attachment file becomes too large, the firm risks decreased response time.

To prevent Attachment Bloat, take the following steps to save attachments in the client's folder and not leave them as attachments to email records in Time Matters:

1. Use the **TMConnect** button to save your Outlook email. If at least one attachment is present, you will see the following dialog box:

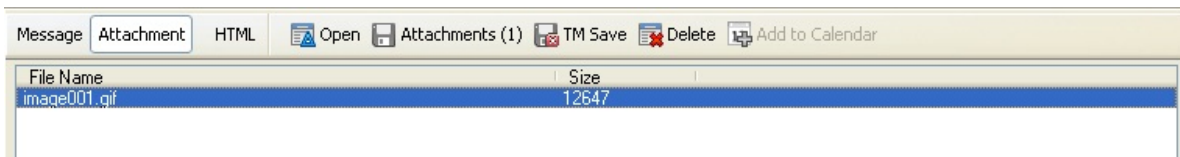


2. Choose the first option and click OK. A Time Matters Email record will now appear on the screen. In the middle of the screen, there is a bar showing options for a **Message** view and an **Attachment** view.

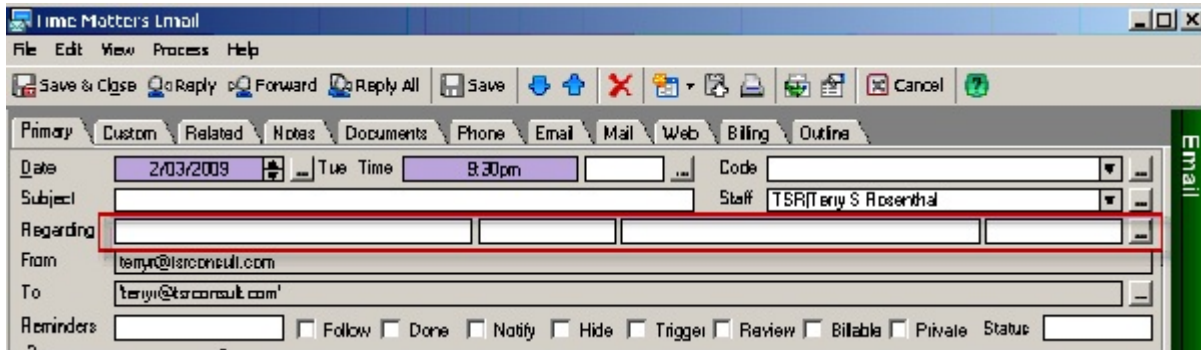


Highlight the **Attachment** button.

3. The lower pane of your email record will display a list of attachments for this email record.



4. Highlight the first attachment and click on the **TMSave** button.
 - a. This brings up a Document Record. Fill out the Document record as you



normally would to save the attachment in your preferred location.

- b. **Save and Close** the Document record.
- c. Now, delete the attachment from your email record.

Please Note: The document is not deleted because you just saved it through your Document record. And, because you made a Document Record from within the Email record, it can be seen from the Related tab on that record.

This procedure works with emails that are both sent and received.