

# Tabellion Times

Autumn Moon Softworks

Issue #5, October 2024

## Fall is Here!

As you might guess from our name, we love autumn! Tabellion is a case management solution developed by Will McPeake and Kevin Malone, aka. Autumn Moon Softworks. Tabellion is specifically targeted to help attorneys track timekeeping and documentation for appointed cases in the State of Tennessee. In this fifth issue of Tabellion Times, a newsletter dedicated to Tabellion, we discuss ...



### Feature Highlight: Templates

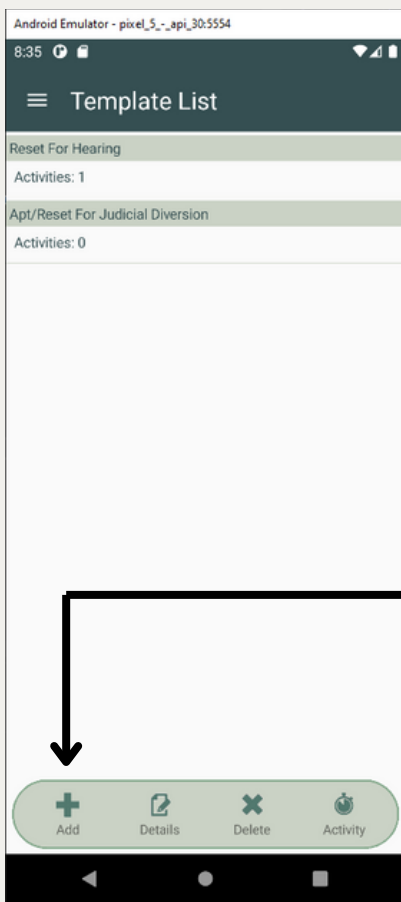
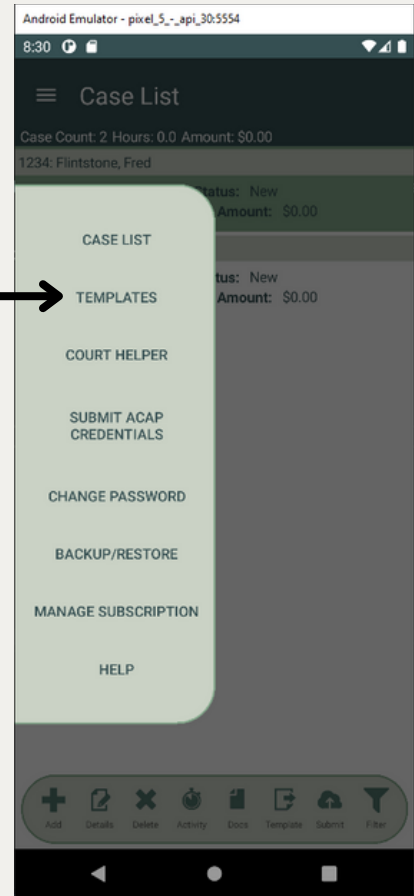
Frequently repeated case activity patterns can be defined as a reusable template that can save a lot of time during activity entry!

Case management  
for indigent clients

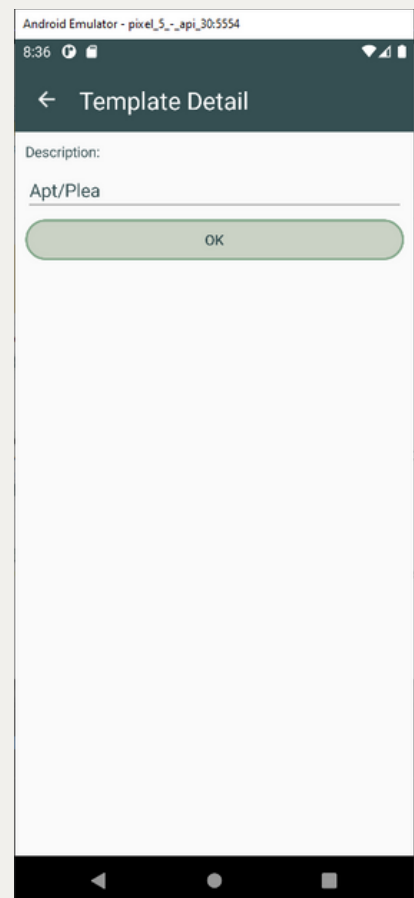


# Feature Highlight: Templates

You can begin creating a template for frequent activities by selecting Templates on the main menu.

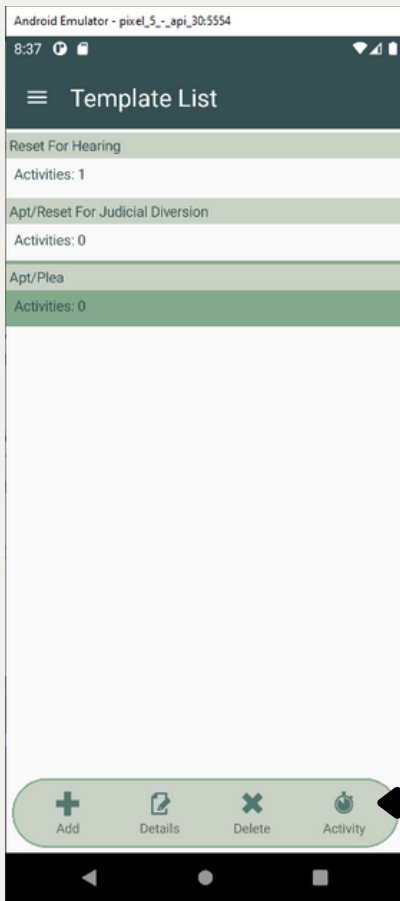


This takes you to the Template List which displays all of your defined templates. From here, click the Add button to add a new template.

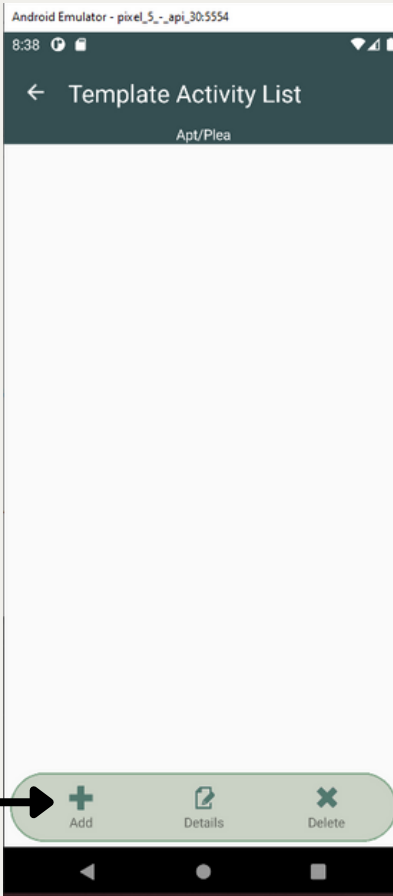


This results in a new Template Detail window being presented. Fill in the description of the new template and click Ok. A common sequence of events for many cases is to receive an appointment, meet with the client, meet with the DA and then submit a plea. In this example, we will create a reusable template that reflects this sequence of events called "Apt/Plea".

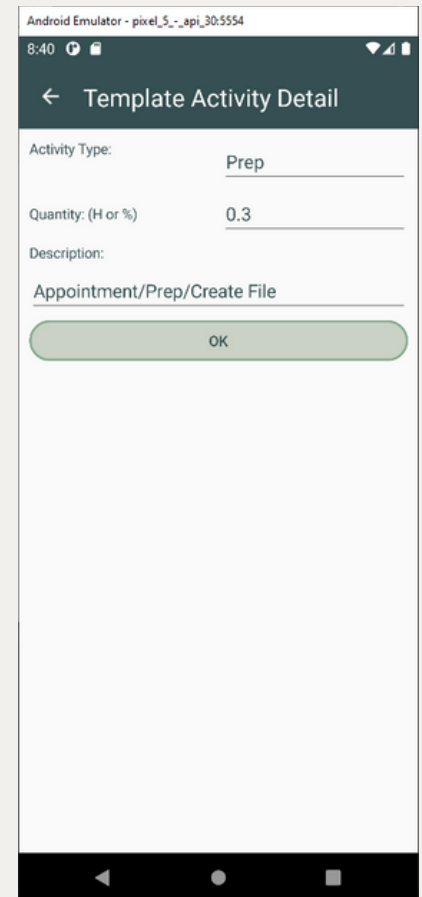
# Feature Highlight: Templates



The new template is now displayed in the Template List. We are ready to add activities to the template by clicking the Activity button.



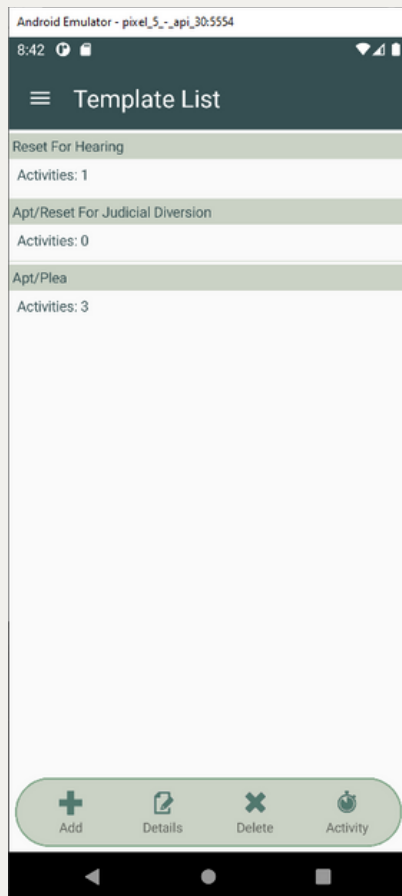
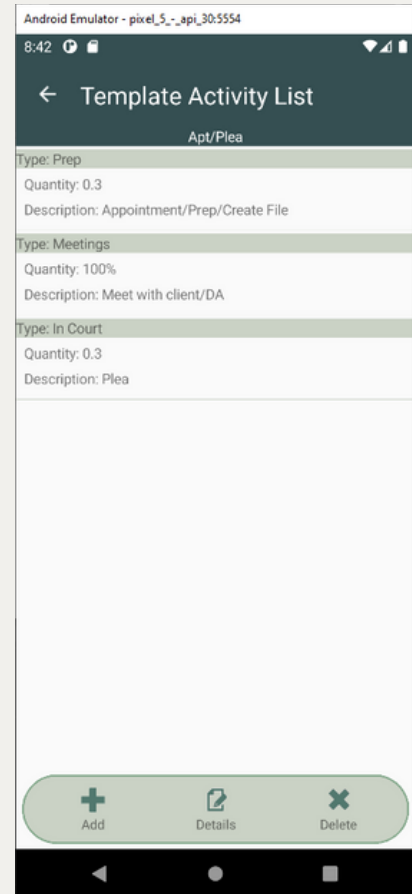
Enter an activity for the template by clicking the Add button.



Enter the activity details. Activity types are the same as those on ACAP. For quantity, enter the typical completion time for the activity. After applying the template to a case, this value can be adjusted to reflect actual time. Finish by entering a detailed description of the activity.

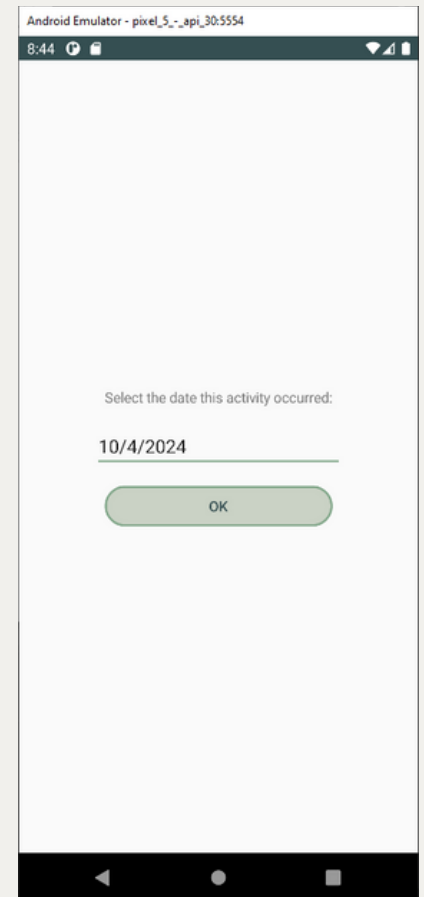
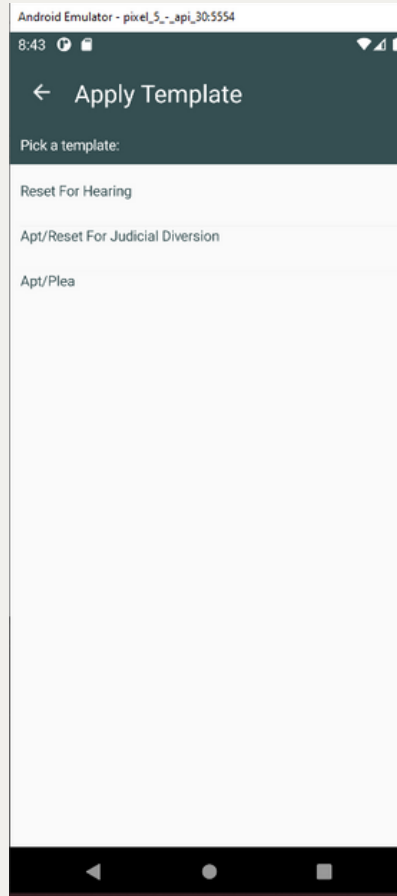
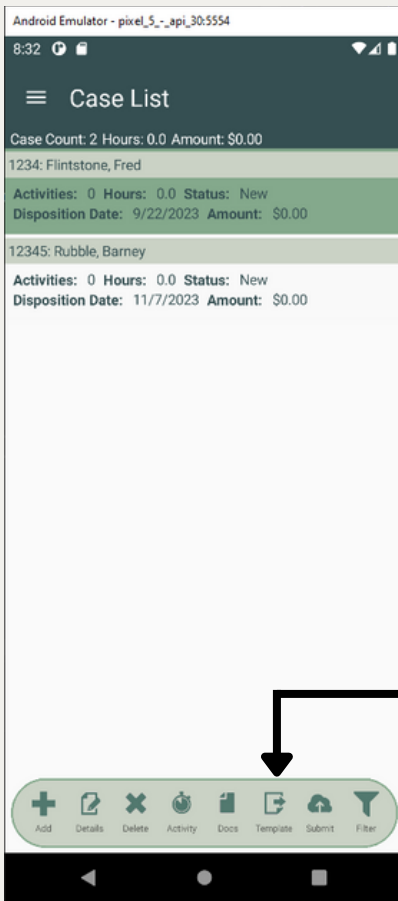
# Feature Highlight: Templates

Continue entering the typical activities for an appointment/plea pattern. Note that on Meetings, the quantity is entered as 100%. This indicates that this activity takes a variable amount of time. When the template is applied to a case, you will be prompted for the total time the set of activities actually took. After accounting for Prep and In Court, which are absolute times, 100% of the rest of the total time is allocated to Meetings. When you are finished entering activities, hit the back button at the top left of the screen.



This takes you back to the Template List. Note that the Apt/Plea template now has three activities and is ready to be applied to cases in a reusable fashion.

# Feature Highlight: Templates



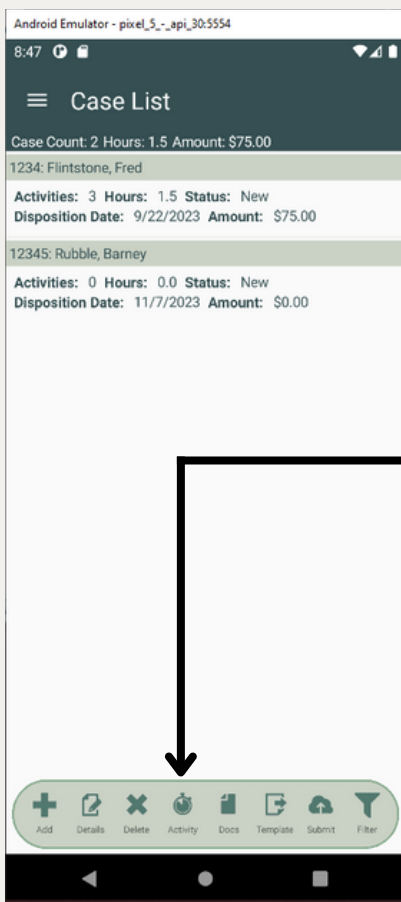
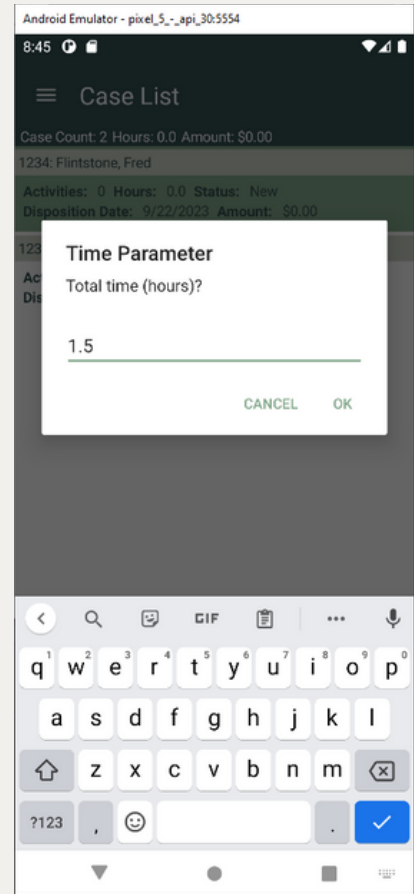
Back on the Case List, you are ready to apply your new template. In this example, we will apply it to the Flintstone case which currently has no activities or hours. Select the case and click the Templates button.

Select the template you wish to apply.

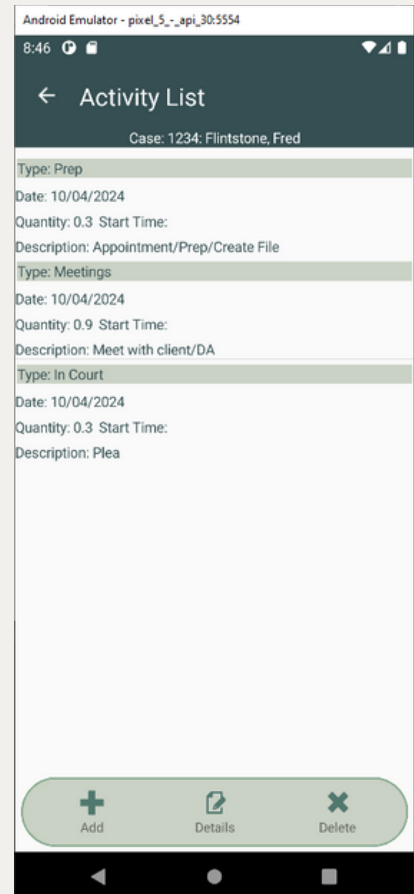
Enter the date the activities occurred and click Ok.

# Feature Highlight: Templates

Next, enter the total amount of time that all activities in the template took to complete for the case on that date. Click Ok.



This takes you back to the Case List. Note that Flintstone now has three activities totaling 1.5 hours. Check and adjust the activities on the case by selecting the case and clicking the Activity button.



Note that we now have three new activities on the Flintstone case performed on 10/04/2024. The total time for all three is 1.5 hours. The Prep and In Court activities were allotted an absolute value of 0.3 each and Meetings was allotted 100% of the remaining time. Times should be adjusted to reflect reality. The Apt/Plea template is ready for use on other cases as needed!

# Thank You!

To all of our current users a big thank you! We couldn't do this without your support. To all of our potential customers, we appreciate you taking the time to read this and consider using our product. We look forward to interacting with you in the future!

Previous issues of Tabellion Times can be viewed or downloaded on our website at:  
<https://autumnmoonsoftworks.com/tabnewsletter>



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