# Tabellion Times

## Autumn Moon Softworks

### Issue #7, December 2024

## Merry Christmas!

... and Happy Holidays! December continues the holiday season! 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 issue of Tabellion Times, we discuss ...

Santa Will

Kevin Claus

### Feature Highlight: Sort and Filter

Tabellion lets you sort and filter cases in a variety of ways, so you can always find the case you are looking for.

### Progress Report: Web Application

We continue to make progress on the web version of the application.

## Case management for indigent clients

AMS Tabellion

# Feature Highlight: Sort and Filter

Tabellion provides robust sort and filter options for various scenarios. By default, cases that have been submitted to ACAP (with a status of Complete) are not displayed in the case list. To see completed cases, change sort and filter options, click the Filter button.
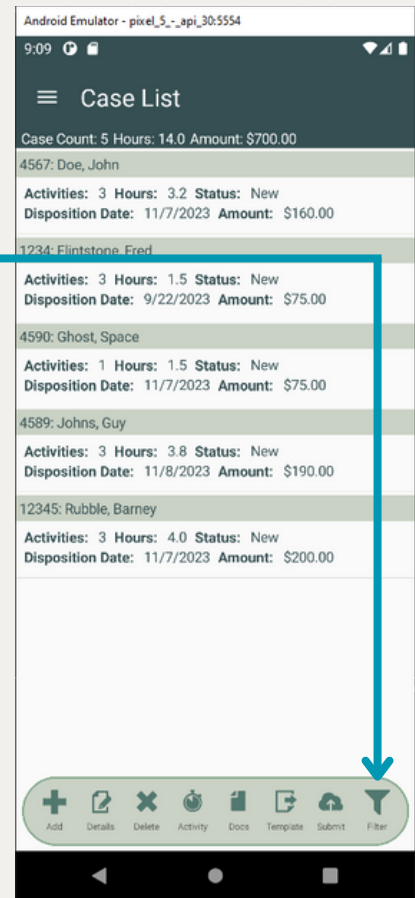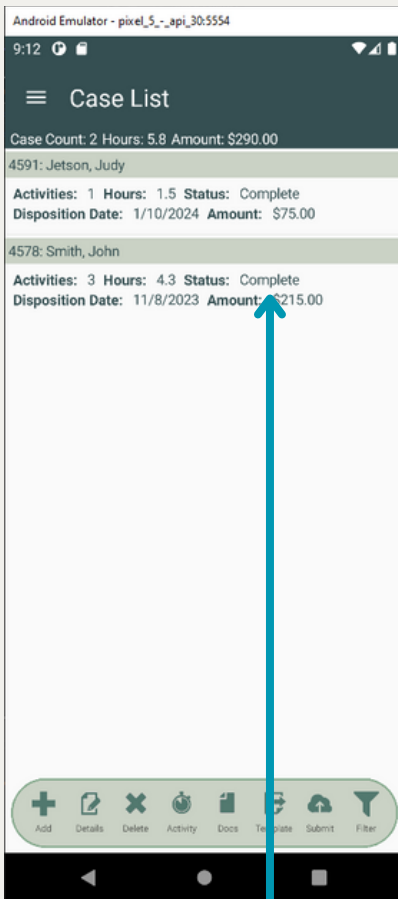


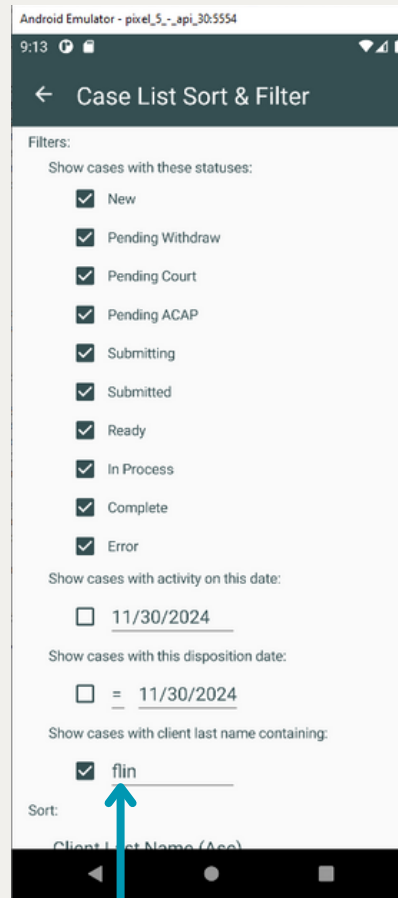This takes you to the Sort & Filter options. As you can see, the Complete status is not selected.
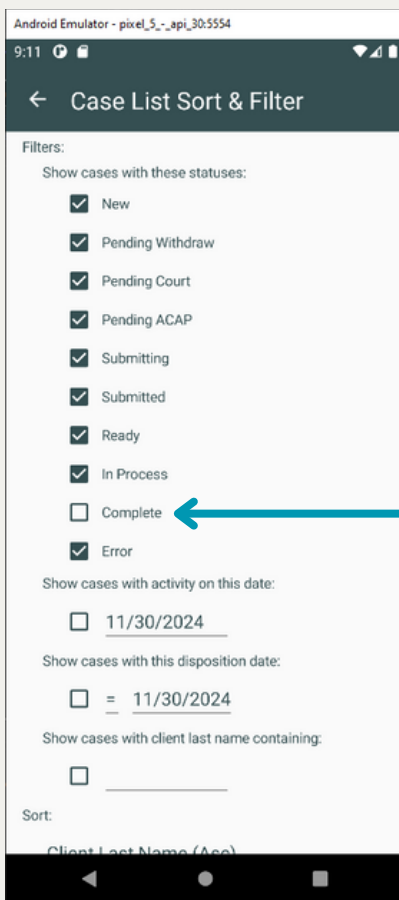




To show cases already submitted to ACAP, first uncheck New and check Complete. To apply the new options, hit the back button.
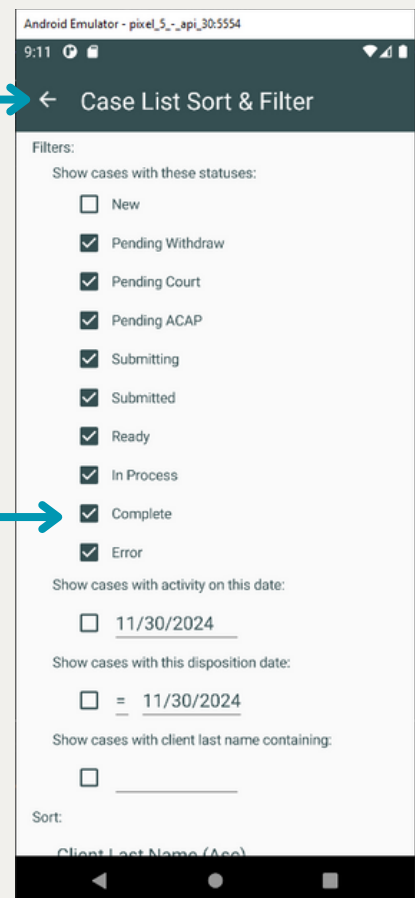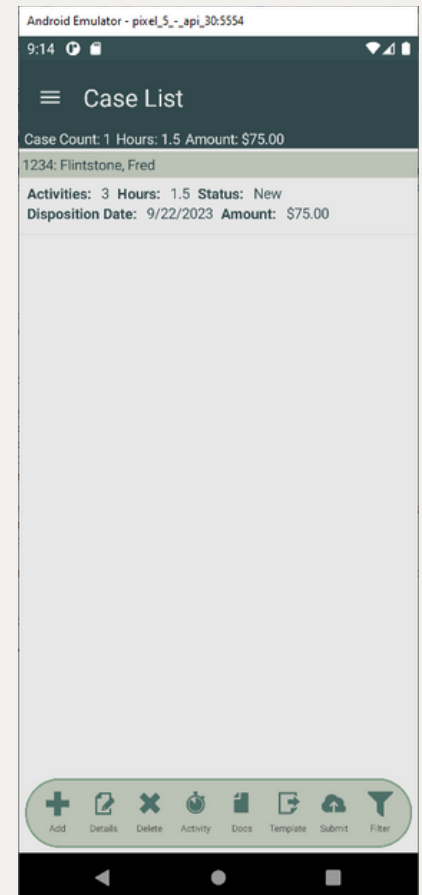
# Feature Highlight: Sort and Filter



The list now includes cases in the Complete status while excluding cases in the New status.



Another common scenario is to find cases by client last name. Here we are searching for Fred Flintstone, accomplished by entering a part of his last name.



The list now includes cases with clients whose last name contains *flin*.

# Feature Highlight: Sort and Filter

Another instance to use sort and filter is for finding upcoming case dates. For example, to see cases with upcoming court dates after 11/06/2023, enable the disposition date based filter, set the operator to greater than and the date to **11/06/2023**. Also, set the Sort option to **Disposition Date (Asc)**.
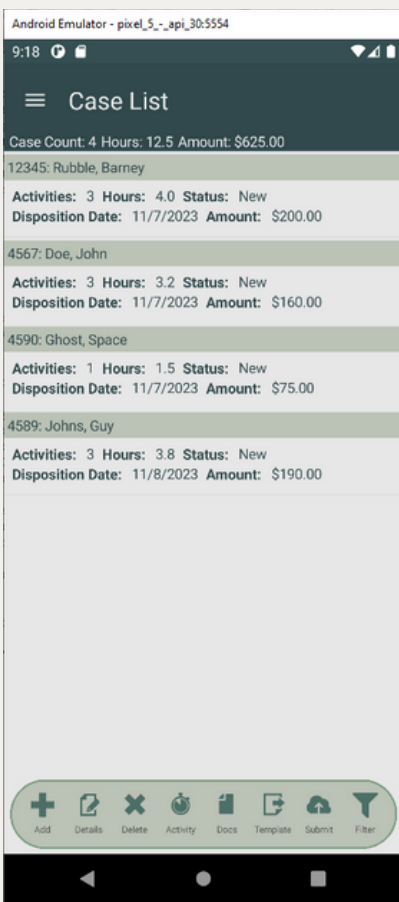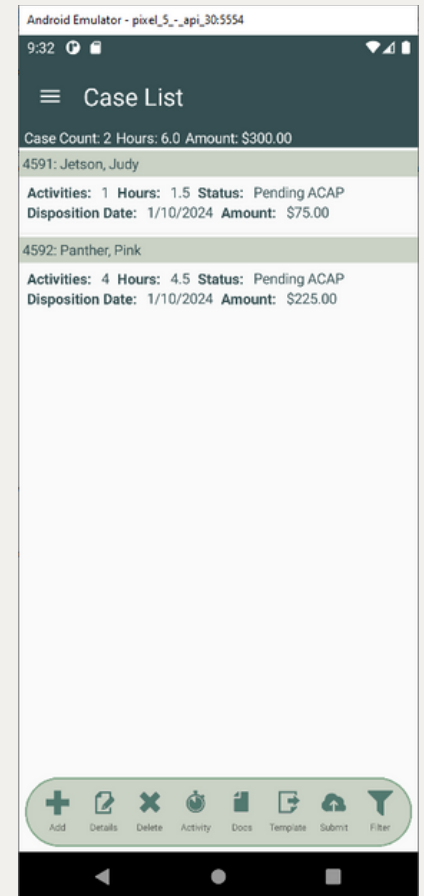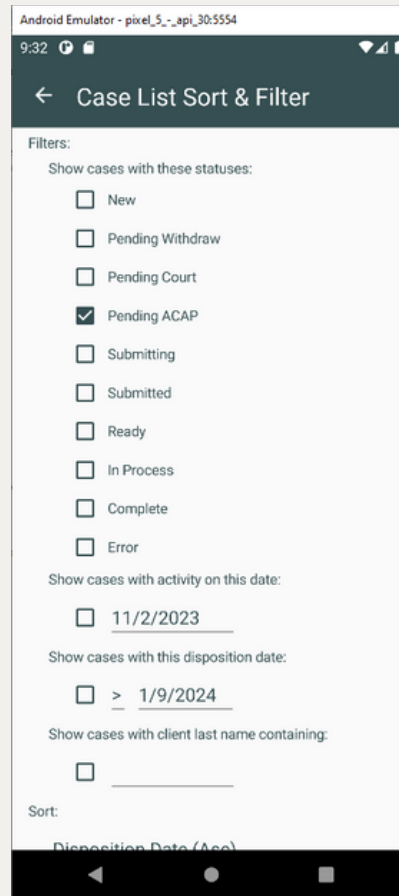


The list now includes cases with a disposition date greater than 11/06/2023. They are sorted in ascending order by disposition date. By keeping the disposition date of unresolved cases set to the next court date, this list gives you a calendar of upcoming cases and court dates.



Another use case is to show cases with activities on a particular date. In this example, the **activity on this date** option is checked and the date is set.
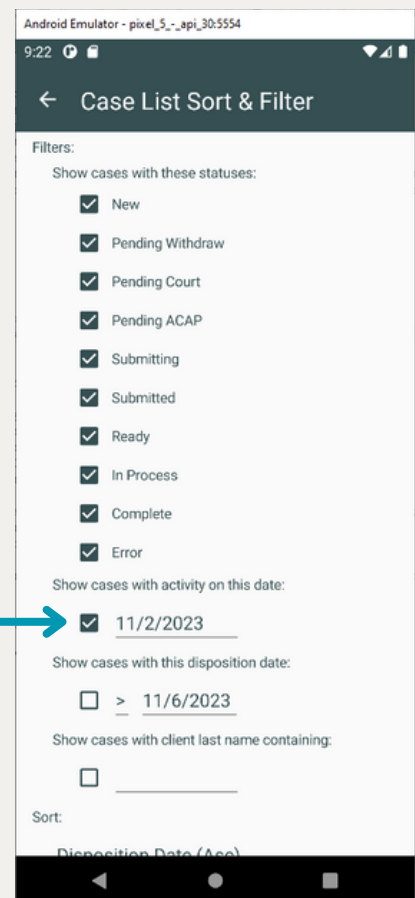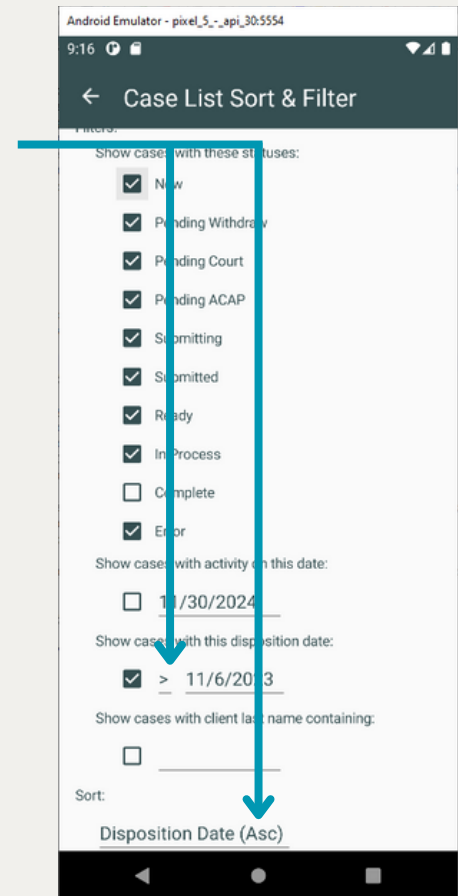
# Feature Highlight: Sort and Filter
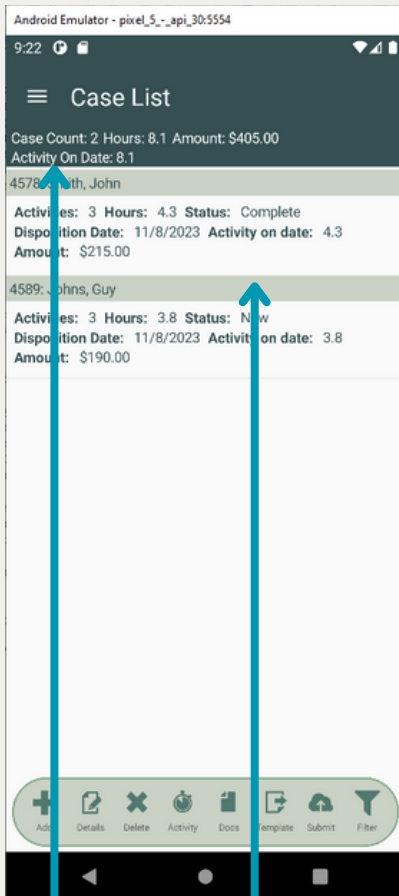


The list now includes only cases with activity on 11/2/2023. The Activity on Date field is displayed for each case and in the summary pane.

Finally, by setting cases which are being prepared for submission to ACAP to the status of Pending ACAP, those cases can be easily filtered.

The list is now limited to only cases in the Pending ACAP status. The Amount field in the summary pane can be used to easily reconcile the total billed amount with ACAP.

These are just a few of the useful applications of the sort and filter functionality in Tabellion.

# Web App Progress

We continue working on the browser version of Tabellion. At this time, we have 27 out of 28 pages complete. That is 96 percent! We are currently working on Document Manager which is the last page but also the most complicated. After completion, we will enter a testing phase. If you are interested in helping with this, please contact us using the email at the end of this newsletter.
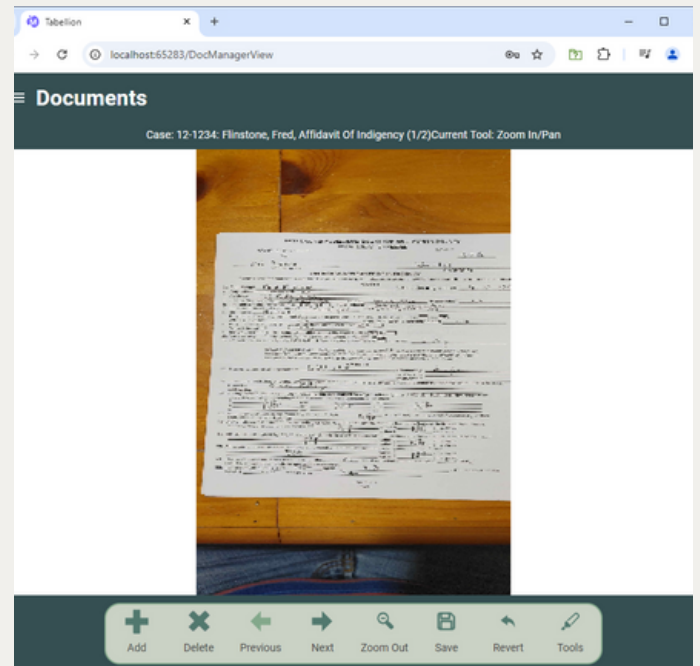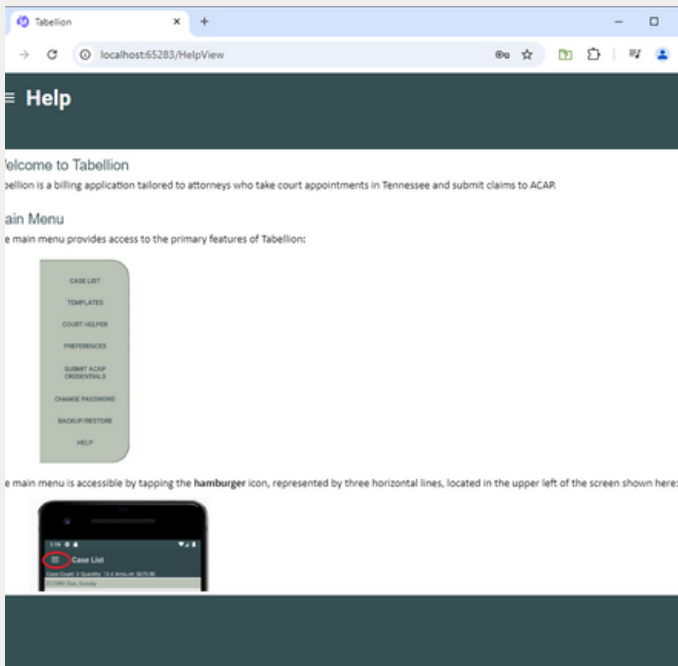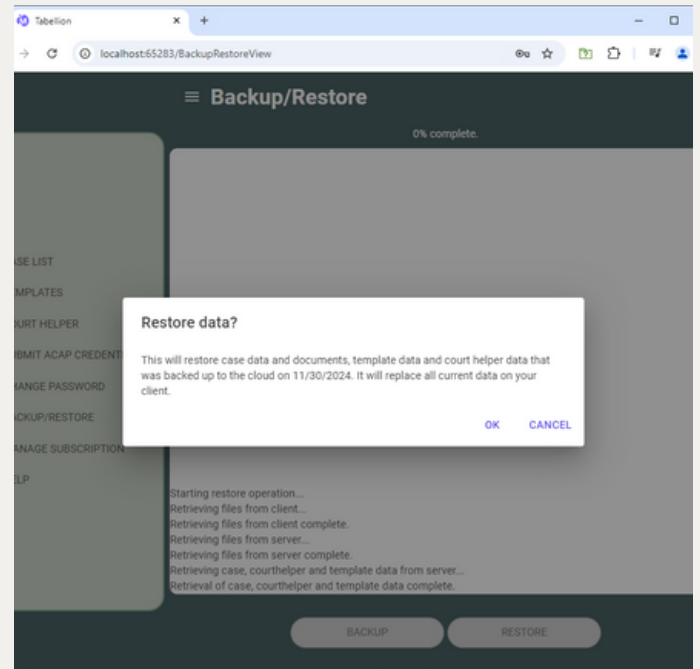
# Thank You!

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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