Tabs3®
Reliable Software. Trusted Service.
by profitsolv

Administrator Guide

Tabs3 Billing

PracticeMaster

Trust Accounting

Accounts Payable

General Ledger

TABS3.COM

Tabs3 Software Administrator Guide

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Introduction

Congratulations on choosing Tabs3 Software! We are pleased to welcome you to the satisfied and growing family of Tabs3 Software users. Our software is backed by our professional staff, which has extensive experience in accounting, program development, and customer support. Our goal is to provide law firms with the highest level of quality products and service. We are committed to providing our customers with user-proven, reliable software.

Purpose of Guide

This ***Administrator Guide*** is a single comprehensive guide for setting up ***all*** of the software including Tabs3 Billing, PracticeMaster, and the Tabs3 Financial software, which consists of Tabs3 Trust Accounting (Trust), Tabs3 Accounts Payable (AP), and Tabs3 General Ledger (GL). This guide is written for the person who configures the software and performs routine maintenance, typically the Office Administrator or Billing Manager.

A separate ***Pre-Install Guide*** provides information on configuring your network and server prior to installing the Tabs3 Software. Once the Tabs3 Software is installed, a ***Post-Install Guide*** covers additional configuration of the server, software, and workstations. For firms with a Platinum license, the ***Platinum Setup Guide*** provides configuration steps for Platinum exclusive features such as Tabs3 Connect and HotBackup.

Additional guides for separate software features are also available. All guides are available on our website at:

Tabs3.com/docs

Knowledge Base

You may be referred to additional detailed information located in our Knowledge Base at:

support.Tabs3.com

Additional Resources

A comprehensive list of all resources for Tabs3 Software can be found in the **Resources** section *(page 1)*.

Customer Service is Important

We understand that customer support is an important part of customer satisfaction. When you purchase a Tabs3 Software license, you have our assurance of customer service and product support. Product support plays a key role in our customer service philosophy. Our Tabs3 Support team is dedicated to helping you get the most from the software by answering technical questions about the product and how it works.

If you have a question or problem concerning the software, we recommend these steps:

1. Check the product documentation including the Help provided with the software. Often, you'll find the answer to a question there.
2. Refer to our Knowledge Base. Our Knowledge Base contains extensive information on Error Troubleshooting, Networking & Windows Issues, "How To" Articles and Product-Related Articles. Our Knowledge Base can be accessed from the Quick Launch by searching for and selecting "Knowledge Base," or found at:

   support.Tabs3.com

3. Contact the consultant from whom you purchased the software license. If you can't find the answer in the product documentation, your consultant may be able to assist you.
4. Call our Tabs3 Support Department at (402) 419-2210. Before you make the call, gather all information pertaining to the problem. We will need to know the serial number of the application you are calling about, which can be found via the About <Application Name> window. To access this window, in the Quick Launch, search for and select "About <Application Name>," (e.g., "About Tabs3 Billing").
5. Email the Tabs3 Support Department. Our support team responds to emails during office hours. Our goal is to respond to your question within one business day. Please keep in mind that time-sensitive and complex issues are better handled over the phone. To request email support, visit **Tabs3.com/support**.

Register the Software

Registering the software establishes you as the licensed user.

▶ To register the software

- In the Quick Launch, search for and select "Register Software."
- Go to ***Tabs3.com/register***

Setting Up the Basics

After installing the software, you need to set up information about your firm. This is performed using the Guided Setup wizard, which is shown the first time any Tabs3 Software application is opened.

Setting Up Tabs3 Software

You can start Tabs3 Software using one of the following methods.

Method	Steps
Windows Desktop	From the Desktop, click a shortcut to access any Tabs3 Software (e.g., Tabs3 Billing, PracticeMaster, etc).
Windows Start menu	For information on accessing Tabs3 Software via the Start menu in each version of Windows, see Knowledge Base Article **R11794**, "Windows Start Menu Options" (***support.Tabs3.com***).

The Guided Setup will begin automatically. Complete this wizard to configure the Tabs3 Software for use.

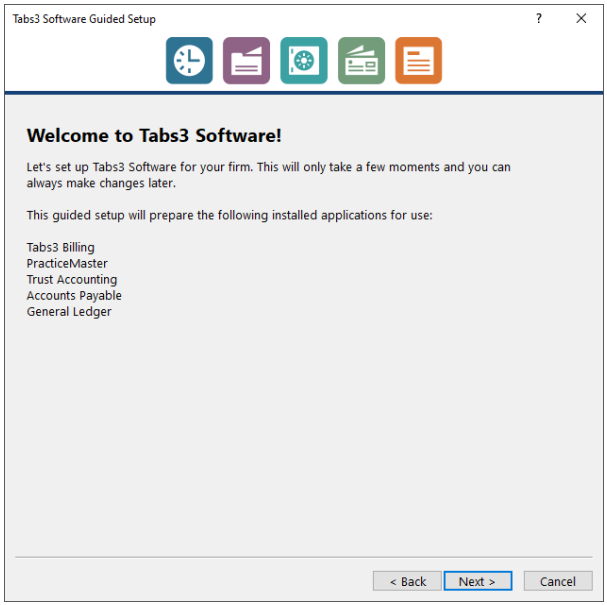


Figure 1, Guided Setup wizard

Setting Up Your Firm Information

When first installing Tabs3 Software, the Firm Information panel is shown. Enter your firm information, including the firm's name, address, telephone, and other basic information, and then click **Next** to continue.

Note: Firm information can be changed at any time. Refer to the *Changing Firm Information* Help topic for complete details regarding other areas in the software that may also need to be changed.

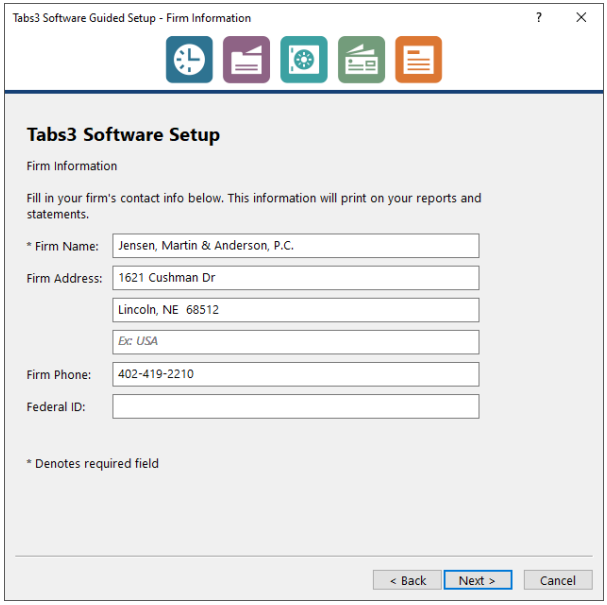


Figure 2, Firm Information panel

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

Firm Information

Configuring Your Client Settings

Tabs3 Billing, PracticeMaster, and Tabs3 Trust Accounting (Trust) all share client matter information. When first installing one of these applications, the Configure Client Settings panel is shown. Specify how many matters you need to utilize for your clients, and then click **Next** to continue.

Note: By default, matters will use a Numeric Key Type, with a number of decimal places corresponding to your setting on this page. The Key Type can be changed if necessary; see the **Defining the Format for Clients and Matters** section *(page 29)* for additional information.

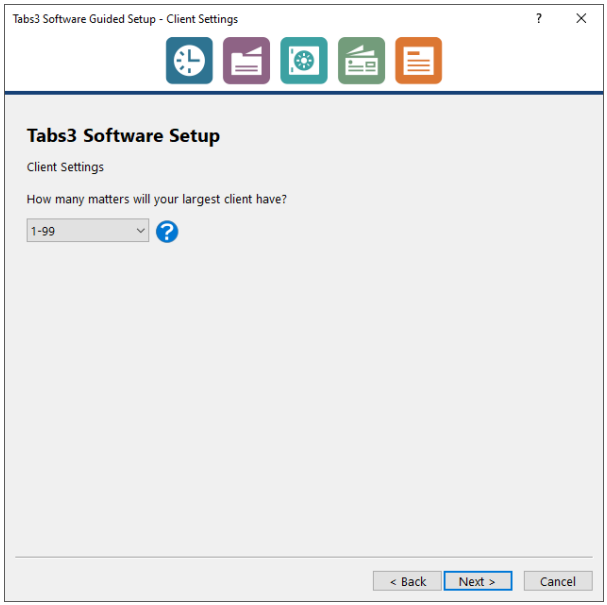


Figure 3, Configure Client Settings panel

Setting Up Your Bank Account

When first installing either Tabs3 Accounts Payable or General Ledger, the Bank Account Setup panel is shown. Specify information about your firm's operating account, and then click **Next** to continue.

Note: You can choose to skip this panel if you prefer to add your bank information at a later time. You can add additional bank accounts after completing the Guided Setup Wizard. For information on entering Tabs3 Accounts Payable (AP) Bank Information, see the **Bank Account Information** *(page 91)* section. For details about Bank Information in Tabs3 General Ledger (GL), see the **Chart of Accounts** section *(page 101)*.

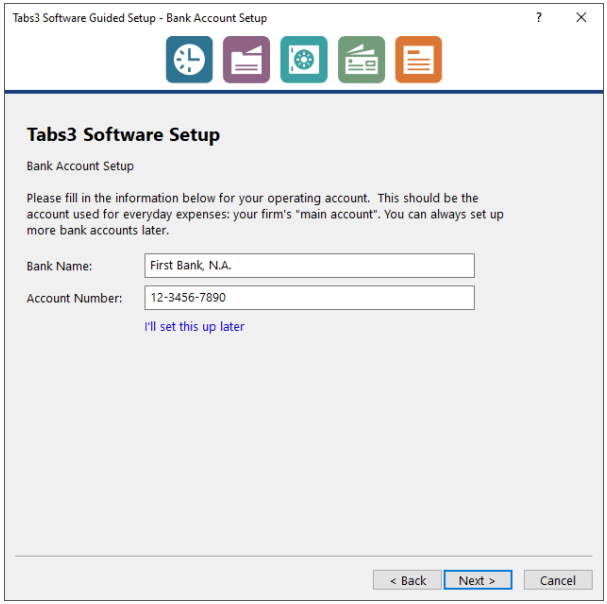


Figure 4, Bank Account Setup panel

Setting Up Your Trust Bank Account

When first installing Tabs3 Trust Accounting (Trust), the Trust Bank Account Setup panel is shown. Specify information about your firm's primary trust account, and then click**Next** to continue.

Note: You can choose to skip this panel if you prefer to add your trust bank information at a later time. You can add additional trust bank accounts after completing the Guided Setup Wizard, as shown in the Trust **Bank Account File** section *(page 82)*.

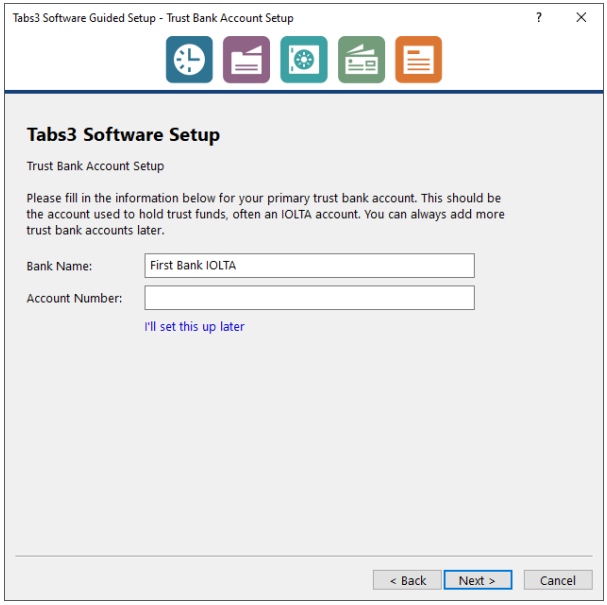


Figure 5, Trust Bank Account Setup panel

Configuring Your User Information

When first installing Tabs3 Software, the User Setup panel is shown. Enter your name, User ID, and password. If you are installing the Platinum SQL edition of Tabs3 Software, you also have the option to link your Tabs3 Software logon to your Windows Account. When done, click **Next**.

Note: Your user information can be changed at any time, and additional users can be configured, as shown in the **Setting Up Users** section *(page 21)*

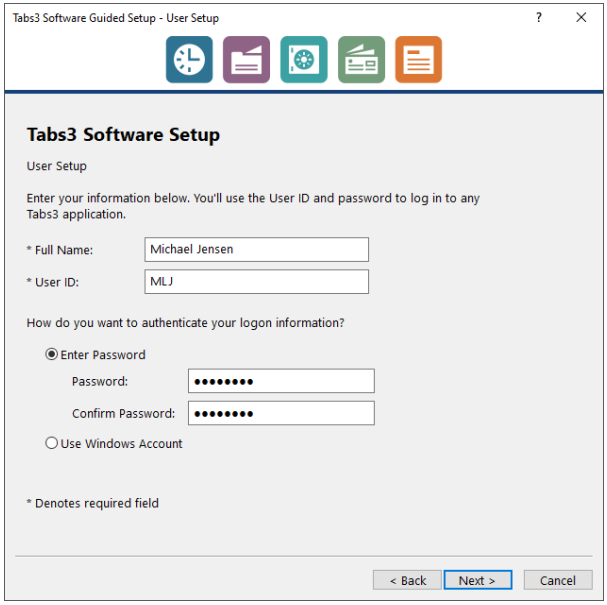


Figure 6, User Setup panel

Setting Up Timekeeper Information

When first installing Tabs3 Billing, PracticeMaster, and/or Tabs3 Trust Accounting, the Timekeeper Information panel is shown. You have the option to create a timekeeper for yourself by specifying your initials and default hourly rate. When done, click **Next**.

Note: Your timekeeper information can be changed at any time, and additional timekeepers can be configured, as shown in the **Timekeepers** section *(page 44)*.

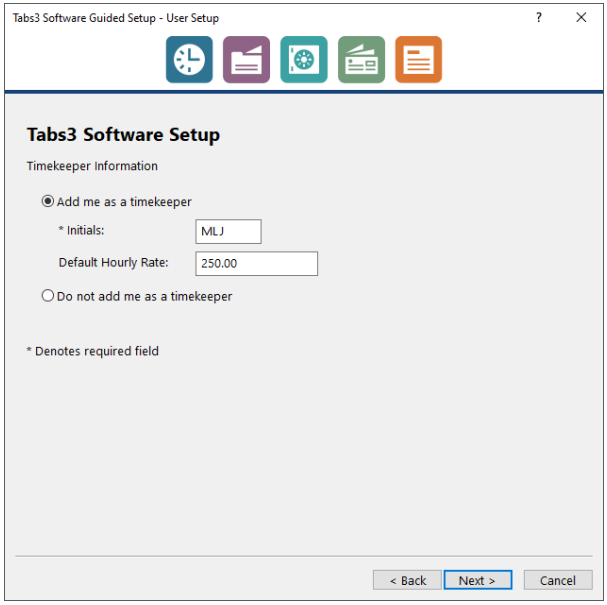


Figure 7, Timekeeper Information panel

Sign Up For Electronic Payment Processing

When first installing Tabs3 Billing or Trust, the Tabs3Pay panel is shown. Tabs3Pay allows you to accept credit card, debit card, and electronic check payments using an online payment portal, or directly in the office through the Tabs3 Software. To start the enrollment process, specify an email address and optionally choose to enable surcharging.

Figure 8, Tabs3Pay panel

Figure 9, Tabs3Pay Surcharging panel

Getting Started

Once you have specified all of the information in the Guided Setup wizard, click **Finish** to close it and begin using the Tabs3 Software. Note that depending on the applications being installed, not all panels may be displayed. Additionally, if you add a Tabs3 Software application at a later time, you may see only a small subset of these panels to configure the new software.

Note: A complete list of the settings configured during the Guided Setup wizard can be found in Knowledge Base Article **R11843**, "Default Settings for Newly Installed Applications."

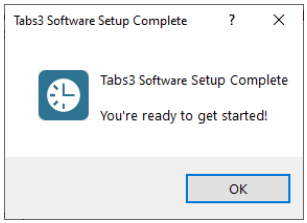


Figure 10, Setup Complete message

When starting a Tabs3 Software application for the first time, each user will be shown a Guided Tour of the major features of the application. Additionally, each application's Home page includes a Getting Started Checklist, which introduces them to the major features and walks through using the software.

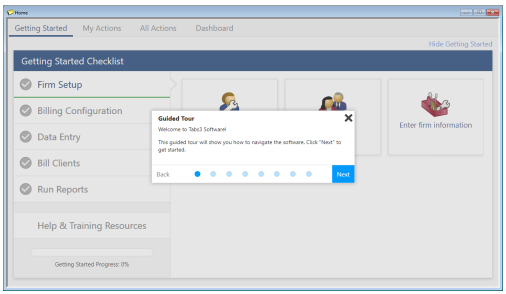


Figure 11, Guided Tour

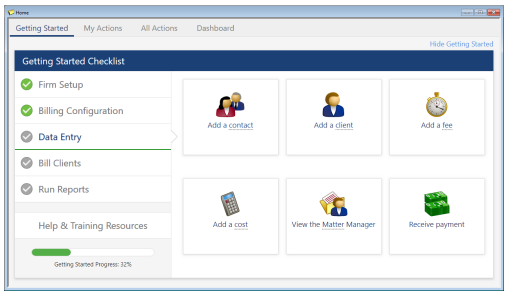


Figure 12, Tabs3 Billing Getting Started Checklist

Setting Up Access Profiles

Access profiles can be defined in System Configuration, and are used to designate which features and functions are accessible by the users who are associated with the access profile. You can define as many access profiles as you like. Rights for each access profile can be as broad or limited as needed. For example, you may want to have an access profile where users can view calendar information but not have access to billing or accounting information. You may want to have an access profile that limits who has access to the General Ledger software.

When you set up users, you will assign one or more access profiles to each user.

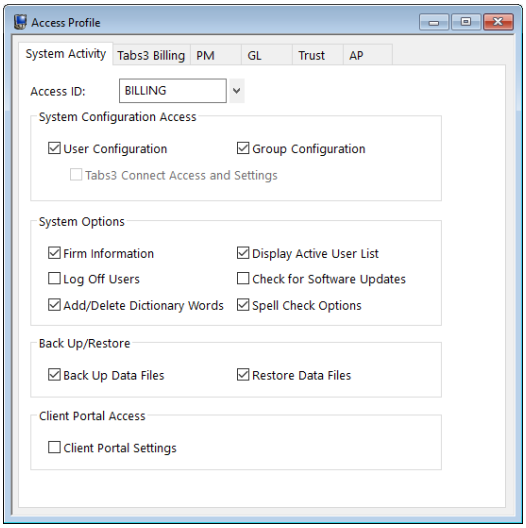


*Figure 13, Access Profiles - **System Activity** tab*

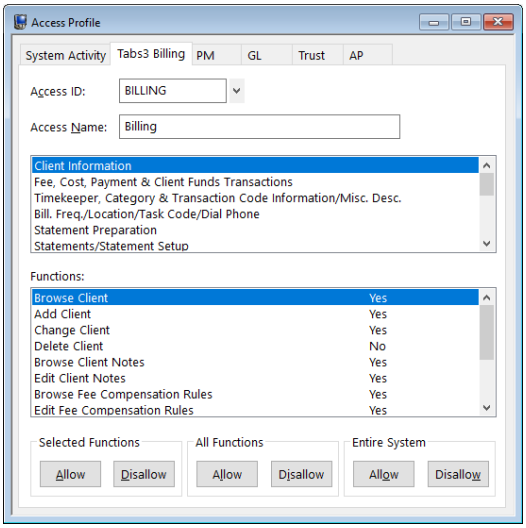


*Figure 14, Access Profiles - **Tabs3 Billing** tab*

Manager Access Profile

A predefined Manager access profile is provided with the software. Users who are associated with the manager access profile have all rights to all functions in all software. The Manager access profile cannot be edited or deleted. Additionally, there are certain tasks that can only be performed by managers, such as resetting users, adding or deleting users, editing other users, and more. A complete list of manager exclusive tasks can be found in the *Manager Access Profile* topic in Help.

Best Practice: We recommend limiting the number of users who are given manager rights. The user created during the Guided Setup is a manager by default.

▶ To add an Access Profile

1. In System Configuration, select the ***File | Open | Access Profile*** menu option.
2. The Access Profile window will be displayed.
   a. In the **Access ID** field, enter a shortcut name using up to 8 characters.
   b. In the **Access Name** field, enter up to 30 characters for the full name.
   c. Under ***System Options***, select which functions, if any, that members of this access profile can access in System Configuration.
   d. Under ***Back Up/Restore***, select which functions, if any, this members of this access profile can access in any of the software.
3. Click the **Tabs3 Billing** tab at the top of the window.
   a. The first group of functions, **Client Information** is highlighted. Under ***Functions***, select which functions members of this access profile can access. You can use the **Allow** and **Disallow** buttons at the bottom of the window to easily select multiple rights at the same time.
   b. Select the next group of functions, **Fee, Cost, Payment & Client Funds Transactions**, and set the rights as desired.
   c. Continue with selecting each group of functions and setting the rights as desired.
4. Click each of the tabs at the top of the window and set the rights as desired.
5. Click to save the information.
6. Click if you want to add additional access profiles.

More Info: A complete listing of the detail access rights for all systems can be found in Knowledge Base article **R11818**, "Access Rights" *(**support.Tabs3.com**)*.

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

Access Profiles

Setting Up Users

You will need to set up a user ID for each user who will be using the software*Figure 15*.

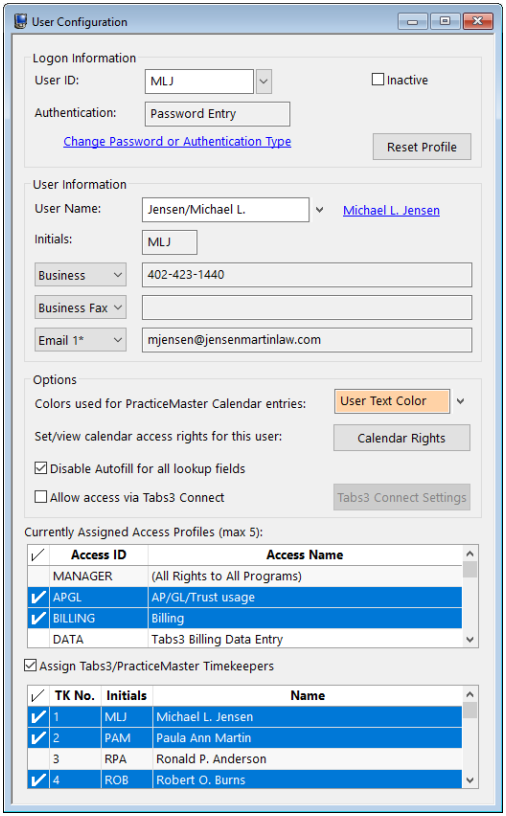


Figure 15, User Configuration window

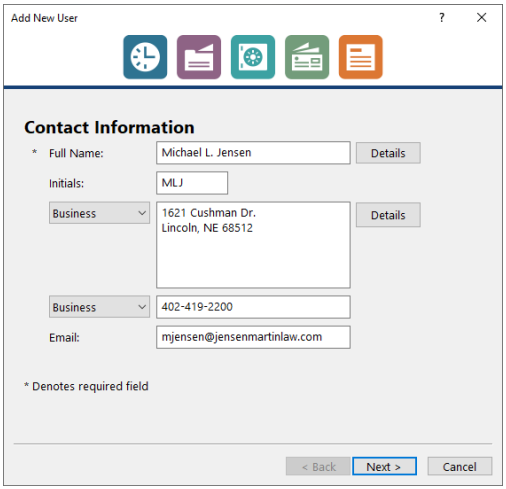


Figure 16, Add New User wizard

▶ To add a User ID

1. In System Configuration, select the ***File | Open | Users*** menu option. The User Configuration window will be displayed.
2. Click the button to start the Add New User wizard.
   a. On the **Contact Information** panel, enter the user's name and other information and then click **Next**.
   b. On the **Login Credentials** panel, enter the **User ID**, choose how the user will authenticate their logon (e.g., using a password or Windows account), and then click **Next**.
      - The **User ID** field must be a unique shortcut name of up to 8 characters. You can use letters, numbers, and the underscore character.
      - When used, the **Password** fields are forced to uppercase letters. Up to 20 characters, numbers, or symbols can be used.
      - Windows account authentication is available in the Platinum SQL edition, and only allows users logged into a Windows account to access the Tabs3 Software. See Knowledge Base Article **R11935**, "Using Windows Authentication to Log in to Tabs3 Software," for additional information.
   c. On the **Preferences & Permissions** panel, assign the appropriate access profiles, and then click **Next**.

      More Info: See the **Setting Up Access Profiles** section *(page 19)*.

   d. On the **Billing Information** panel, optionally specify timekeeper information and then click **Next**.

      More Info: See the **Timekeeper** section *(page 44)* for more information.

   e. On the **Tabs3 Connect Access** panel, if using Tabs3 Connect, optionally allow access and then click **Next**.

      More Info: See the Configuring **Tabs3 Connect** section *(page 105)* for more information.

f. On the **Additional Setup** panel, if integrating with PracticeMaster, optionally add the user to groups, assign calendar rights, and assign Tabs3/PracticeMaster timekeepers .

> **More Info:** See the following sections for more information:
>
> - **Groups** *(page 28)*
> - **Calendar Rights** *(page 71)*

g. Click **Finish** to save the new user record.

3. Click if you want to add additional users.

> **Note:** Users can change their own contact information (including User Name, Initials, and Email Address) if they belong to an access profile that has been assigned access rights to edit contact records, and can change their own Password, Calendar Colors and Calendar Rights if they belong to an access profile that has been assigned access rights to User Configuration. However, only managers can change access profile assignments, timekeeper assignments, or add new users.

Blank User ID

A predefined User ID is provided with the software. This user is named (BLANK) and is assigned to the manager profile.

> **Best Practice:** Once you have set up another manager user, we recommend marking the (BLANK) User ID inactive in order to preserve system security.

Shared Resources

Set up your shared resources as users for scheduling purposes in the PracticeMaster Calendar. Resources that you may want to set up as users include rooms, projectors, easels, laptops, tablets, company vehicles, etc. For example, set up each conference room as a user. Then, when you need to schedule a meeting in that room, select each attendee and the room to easily find an open timeslot.

Outlook Integration

A separate window for configuring Outlook integration with PracticeMaster for each user is available in the PracticeMaster Quick Launch by searching for and selecting "Outlook Synchronization." Additional information can be found in Knowledge Base article **R11400**, "Outlook Integration Guide. "

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

User Configuration

Contacts

Contacts are the people or organizations you interact with in the process of doing business on behalf of the firm or your clients. The Contact file is used to store information such as name, phone number, address, and email address. Contacts are shared between all Tabs3 Software applications.

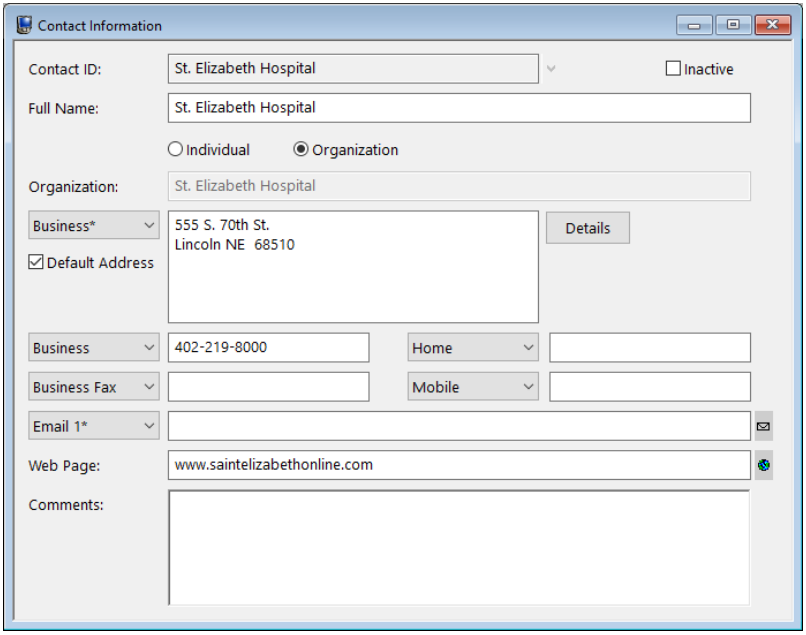


Figure 17, Contact Information

More Info: A detailed explanation of contacts, including instructions on how to add, change, and delete contacts, can be found in the System Configuration Help or in the ***Clients & Contacts Guide***.

Security Overview

Tabs3 Software offers multiple layers of security.

Access Profiles

Access profiles (page 19) are created to assign rights to the various software systems and menu options.

User ID

User IDs are created for each person who will have access to the software. When defining User IDs, you will also assign one or more access profiles to which they belong.

Password

Passwords are assigned to User IDs.

Secure Clients

Clients can be set up as secure clients, thereby allowing you to specify exactly which User IDs have access to each secure client. Clients who are designated as secure clients cannot be seen by users unless the User ID being used has manager rights or has been assigned access to the secure client. Clients marked as secure are secure in Tabs3 Billing, PracticeMaster, and Tabs3 Trust Accounting.

> **Note:** When a client is designated as secure, the client's contact information is stored in the Client file instead of the Contact file. This is because contact information is viewable by all users with browse rights to the Contact file.

Timekeeper

You can set up a User ID so the user has access to a particular timekeeper's transactions but does not have access to other timekeeper's transactions. This is useful in situations where you have an employee who is responsible for a particular timekeeper but you want to restrict the employee from accessing any work performed by other timekeepers in the firm. Tabs3 Billing timekeepers can be assigned to a User ID by selecting the **Assign Tabs3/PracticeMaster Timekeepers** check box in System Configuration.

Calendar Security

Calendar records in PracticeMaster can be designated as public or private. All public calendar entries can be viewed by all users. Users can designate which users will have:

- edit rights to their public calendar records;
- browse rights to their private calendar records; and
- edit rights to their private calendar records.

These rights allow the firm and users to implement sophisticated access rights for their calendar entries. For example, a timekeeper can designate that only his secretary and partner have edit rights for his public calendar records, only his secretary has browse rights to his private calendar records and nobody has edit rights to his private calendar records. PracticeMaster calendar rights are implemented via the **Calendar Rights** button in the User Configuration window of System Configuration.

More Info: Additional information regarding security can be found in the following Knowledge Base articles at **support.Tabs3.com**:

- Knowledge Base Article **R11818** - Access Rights
- Knowledge Base Article **R11459** - Ethical Walls in Tabs3 Software

Setting Up Groups

Once users have been defined, you can set up groups. Groups are composed of various users primarily for PracticeMaster calendaring, scheduling, filtering, and eNote purposes.

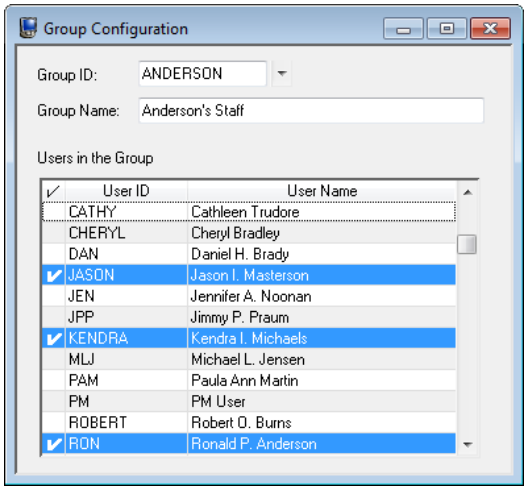


Figure 18, Group Configuration window

▶ To add a group

1. In System Configuration, select the ***File | Open | Group*** menu option.
2. The Group Configuration window will be displayed.
   a. In the **Group ID** field, enter an 8-character group ID.
   b. In the **Group Name** field, enter the name of the group.
   c. Under *Users in the Group*, click the check mark column for each user who is a member of the group.
3. Click to save the information.
4. Close the window.

Tip: Groups are optional and can be defined later. Think about scheduling purposes when setting up groups. You can also look at the various groups you use for email purposes as a starting point. For example, you may want to define a separate group for each department, a group for all partners, or a group for all staff who work with a particular attorney.

Defining the Format for Clients and Matters

Although this guide includes detailed information regarding Customization for each of the software applications in later sections, there is one area in Customization that is common to Tabs3 Billing, PracticeMaster, and Tabs3 Trust Accounting (Trust), and that is the configuration of the Client ID. The Client ID represents your client and matter numbering scheme. This section discusses how the Client ID format is defined.

Two fields named **Key Type** and **Decimal Places** are used to determine your client numbering scheme. By default, Tabs3 Software is configured to use a Numeric Key Type, with a decimal place determined by your selection during the Guided Setup. This information is used primarily in Tabs3 Billing; however, the information is mirrored to PracticeMaster and Trust.

There are three different Key Types: **Numeric**, **Mixed**, or **Alpha**. All Client IDs can have a maximum of 12 characters including an optional decimal point. Typically the client portion of the Client ID is left of the decimal and the matter number is right of the decimal. The 12-character limit for Client IDs includes the portion on the left side of the decimal, the portion on the right side of the decimal, and the decimal itself.

The Decimal Places determines the number of digits for the matter position. Many firms will use 2 or 3 to start with.

Key Type	Description
Numeric	A **Numeric Key Type** allows only numbers in the client and matter portions of the Client ID. 123.45, 20.001, and 5000.110701 are all examples of a Numeric Client ID.
Mixed	A **Mixed Key Type** allows alpha or numeric characters in the client portion of the Client ID but only allows numeric characters in the matter portion of the ID. ABC.01, DE12.004, and Smith.110801 are all examples of a Mixed Key Type.
Alpha	An **Alpha Key Type** allows both alpha and numeric characters in the client and matter portions of the Client ID. ABC.DE and FG12.H34 are examples of an Alpha Key Type.

There are advantages to using a **Numeric Key Type**. When using a **Numeric Key Type**, the primary advantage is that Tabs3 Billing can automatically assign new Client IDs and Matter IDs. When using a **Mixed Key Type**, Tabs3 Billing can automatically assign new Matter IDs, but not new Client IDs.

Best Practice: If you are not sure which **Key Type** to use, we recommend continuing to use a **Numeric Key Type**.

Setting Up Printers

Each workstation that uses Tabs3 Software can define its own default printer. This printer is used for printing reports.

▶ To define the default report printer

1. In the Quick Launch, search for and select "Print Setup."
2. The Printer Setup window will open.
3. In the **Printer** field, select the desired default printer.

Tip: Click the **Page Setup** and **Advanced Printing Features** to view the different options available.

In addition to the default report printer, each workstation maintains a default Tabs3 Billing final statement printer, a default Tabs3 Billing draft statement printer, a default AP check printer, and a default Trust check printer. These printers are defined when using those features. Additional print options for printing statements and checks are available when accessing the Print Setup window in Tabs3 Billing, AP, and Trust.

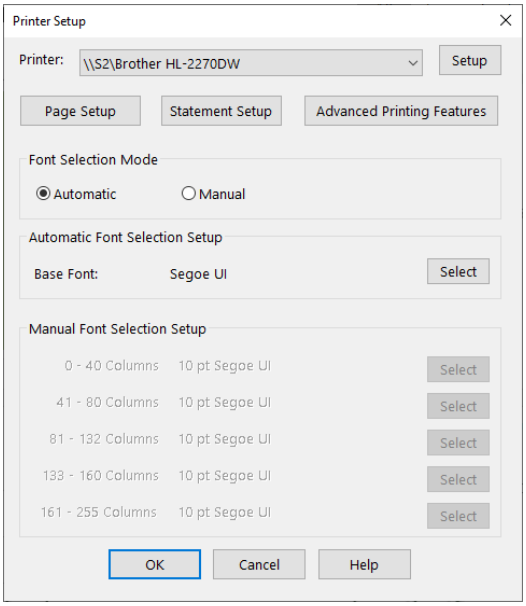


Figure 19, Printer Setup with ***Automatic*** *Font Selection*

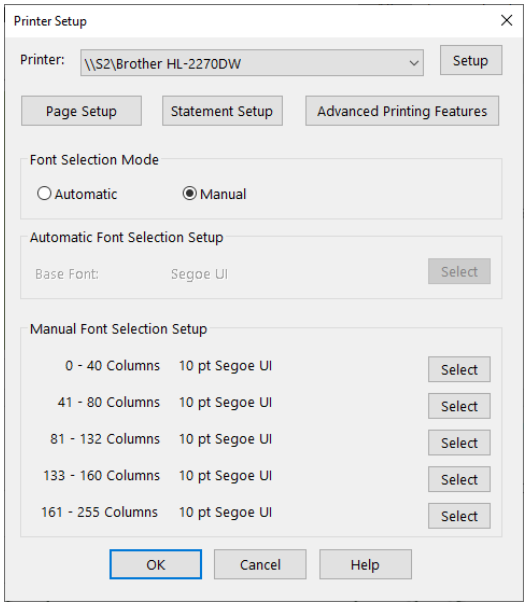


Figure 20, Printer Setup with ***Manual*** *Font Selection*

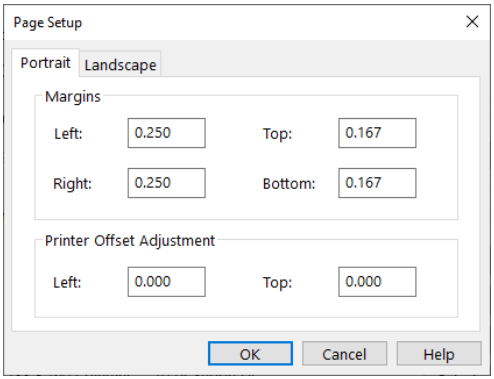


Figure 21, Page Setup

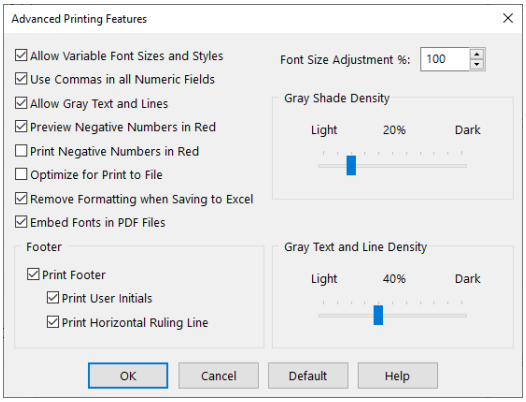


Figure 22, Advanced Printing Features

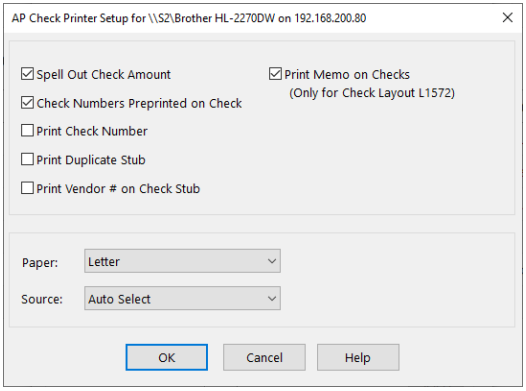


Figure 23, AP Check Printer Setup

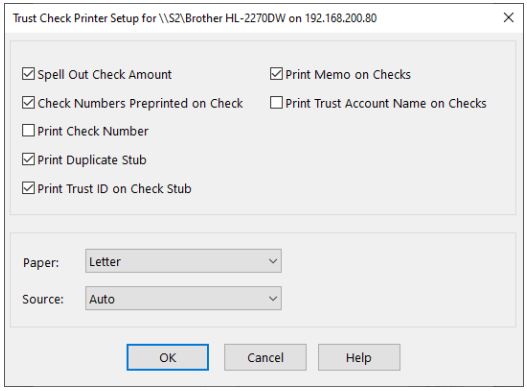


Figure 24, Trust Check Printer Setup

More Info: Complete details regarding print options can be found in Help.

Navigating Tabs3 Software

Each user can select certain settings, and then customize various sections depending on those settings, to personalize their navigation throughout the software.

Choose Theme Settings

The Theme Settings determines the navigation options and appearance of each Tabs3 Software application.

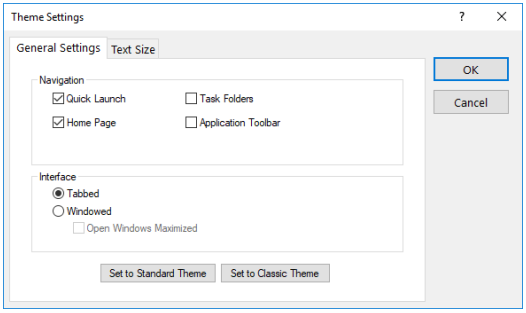


Figure 25, Theme Settings

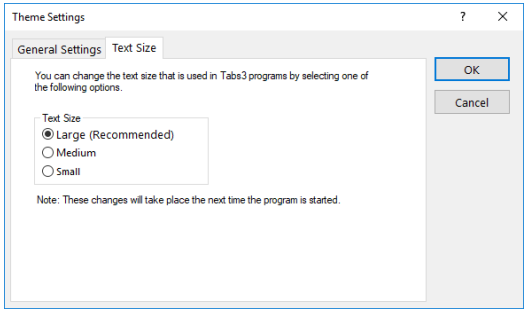


Figure 26, Text Size tab

You can change the Theme Settings of each application to include the navigation features you want on the **General Settings** tab. On the **Text Size** tab, you can customize the text size used in windows, menus, page tabs, lists, and messages.

▶ To configure Theme Settings

1. In the Quick Launch, search for and select "Theme Settings."
2. On the **General Settings** tab, select the Navigation options you want to in windows, menus, page tabs, lists, and messages include, and clear the navigation options you want to remove.
3. On the **Text Size** tab, select the text size you want to be used for windows, menus, page tabs, lists, and messages in the software. Each workstation will show a Recommended setting based on your operating system, resolution, and scaling options.
4. Click **OK** to use the new theme options.

For additional information on changing text size, see Knowledge Base Article **R11778**, "Customizing Fonts and Colors in Tabs3 Software."

Customizing Quick Launch

When the Quick Launch pane is enabled in Theme Settings, it is shown on the left side of the application window. The Quick Launch pane provides access to all features and reports (collectively referred to as actions) in the application via the**Search Actions** box. It also provides one-click access to your recent and frequently used actions and matters.

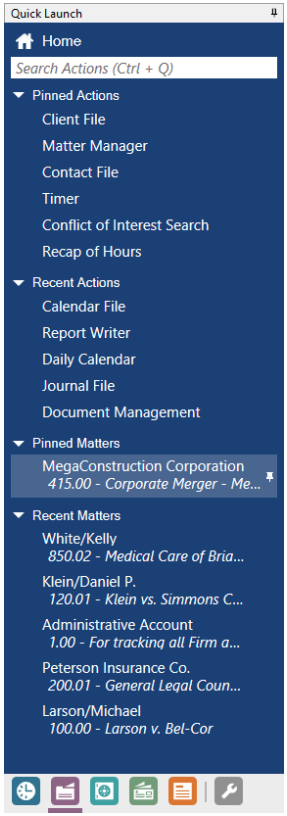


Figure 27, PracticeMaster Quick Launch

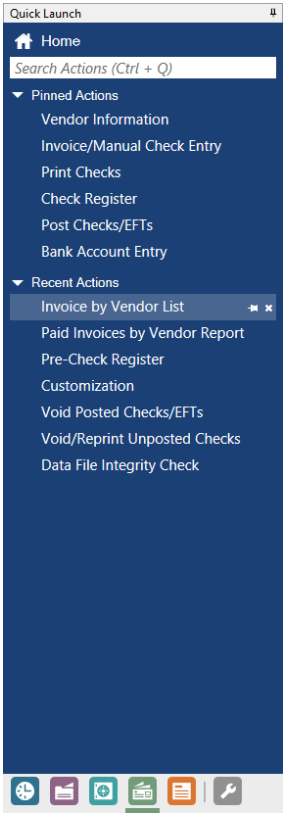


Figure 28, AP Quick Launch

You can customize the Quick Launch to provide easy access to your most used actions and matters.

▶ To automatically hide the Quick Launch when not in use

- Click to the right of the Quick Launch pane heading.

When hidden, only the Quick Launch button is shown on the left side of the screen. Moving your mouse over this button will cause the Quick Launch pane to slide into view, allowing you to use it as needed.

▶ To always show the Quick Launch pane

1. Hover over the Quick Launch button to display the Quick Launch pane.
2. Click to the right of the Quick Launch pane heading.

▶ To expand or collapse a section

- Click the arrow to the left of the section name.

If an arrow pointing down is shown, the section is expanded and will show all of its contents. If an arrow pointing right is shown, the section is collapsed and none of its contents will be shown.

▶ To move a section

1. Hover over the section name.
2. Click and drag the section to the desired position.

Note: The **Home** link, **Search Actions** field, and **Application Toolbar** in the Quick Launch pane cannot be collapsed or moved.

Recent and Pinned Actions

In all Tabs3 Software applications, the last ten actions used are shown in a Recent Actions section on the Quick Launch pane. Each user can pin frequently used actions so they are readily available. Clicking an action in the Recent Actions or Pinned Actions section opens the feature or report.

▶ To pin an action

1. Hover over an action in the Recent Actions section.
2. Click to the right of the action.

The action will be removed from the Recent Actions section and placed in the Pinned Actions section.

▶ To remove a pinned action

1. Hover over an action in the Pinned Actions section.
2. Click to the right of the action.

The action will be removed from the Pinned Actions section and added to the top of the Recent Matters section.

▶ To move a pinned action

1. Hover over an action in the Pinned Actions section.
2. Click and drag the action to the desired position.

Recent and Pinned Matters

In Tabs3 Billing and PracticeMaster, the last five matters used are shown in a Recent Matters section on the Quick Launch pane. Each user can pin frequently used matters so they are readily available. Clicking on a matter in the Recent Matters or Pinned Matters section in Tabs3 Billing or PracticeMaster opens the Matter Manager for that matter.

▶ To pin a matter

1. Hover over a matter in the Recent Matters section.
2. Click to the right of the matter.

The matter will be removed from the Recent Matters section and placed in the Pinned Matters section.

▶ To remove a pinned matter

1. Hover over a matter in the Pinned Matters section.
2. Click to the right of the matter.

The matter will be removed from the Pinned Matters section and returned to the Recent Matters section.

▶ To move a pinned matter

1. Hover over a matter in the Pinned Matters section.
2. Click and drag the action to the desired position.

Customizing the Home Page

The Home Page contains the following pages:

- **My Actions:** The My Actions page can be customized in each application to include the most frequently used features and reports. Each user can customize their own actions.
- **All Actions:** The **All Actions** tab is used to navigate the software and provides access all features in the software. This tab is divided into groups. Clicking a group will display the actions within that group.
- **Dashboard:** The Dashboard displays key information sections.

The following section explains how to customize the My Actions page.

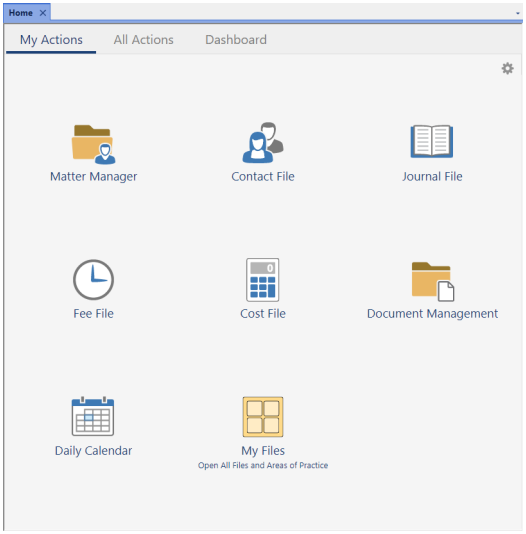


*Figure 29, PracticeMaster **My Actions** view*

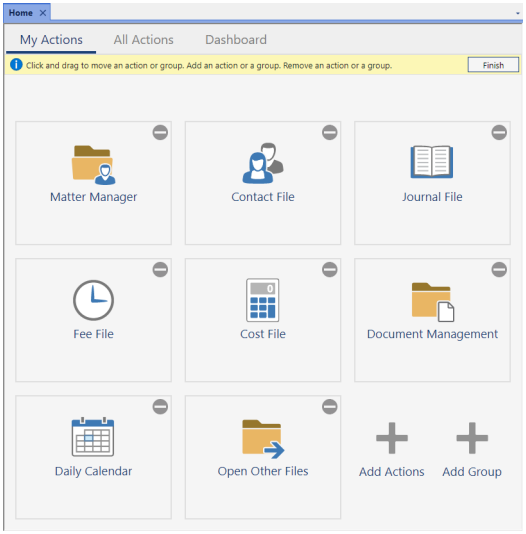


Figure 30, Customize My Actions

▶ To customize My Actions

1. From the **My Actions** view of the Home page, click the ⚙ (Customize My Actions) icon in the top right corner.
    a. To add a feature or report, click the **Add Actions** button.
        i. Select one or more actions and click the **Add >>** button.
        ii. Click **Finish** to add the selected action(s) to the current group.

b. To add a group, click the **Add Group** button.
   i. Specify a name for the group.
   ii. Optionally specify a description and select an icon color for the group.
   iii. Click **Next**, and optionally select one or more actions to add to the new group.
   iv. Click **Finish** to add the new group to the current group.

c. Reorder actions or groups as desired.
   i. Move the mouse pointer over the action or group.
   ii. Drag the item to the desired location. You can move an action into a group by dragging the item to the edge of the desired group.
   iii. Release the pointer.
   iv. The group will be reordered with the action or group in the new position.

2. When finished customizing the various icon positions, click the **Finish** button in the top right corner.

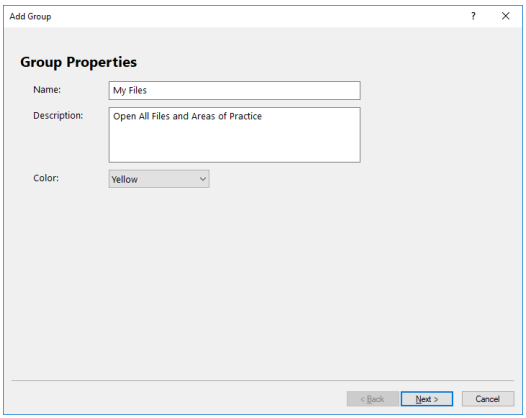


Figure 31, Add Group

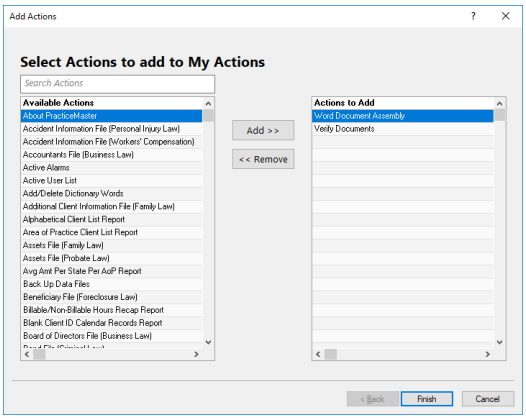


Figure 32, Add Actions

Training Videos

You can view the following training videos for more information. Clicking a link will open the associated training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

Navigating Through the Tabs3 Software

Customizing & Using Quick Launch

Using and Customizing My Actions

Setting Up Tabs3 Billing

This section includes the information you need to start using Tabs3 Billing.

Tabs3 Billing Customization

Tabs3 Billing Customization is configured based on the options you select during the Guided Setup; however, you can change these options at any time. The Customization window consists of several tabs. Complete details regarding the fields on each tab can be found in Help.

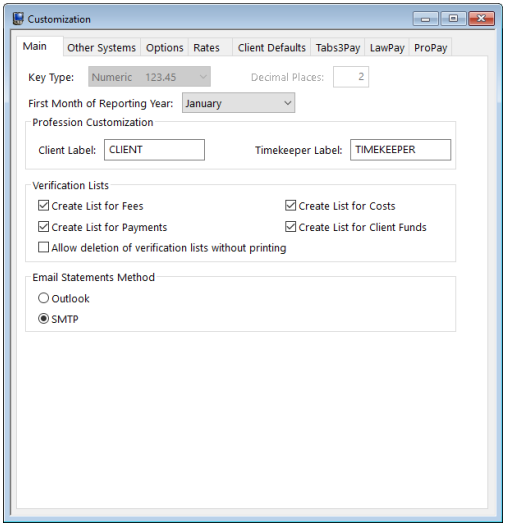


*Figure 33, Tabs3 Billing Customization - **Main** tab*

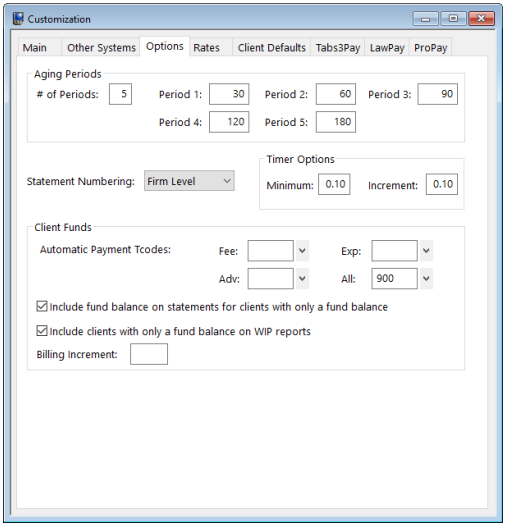


*Figure 34, Tabs3 Billing Customization - **Options** tab*

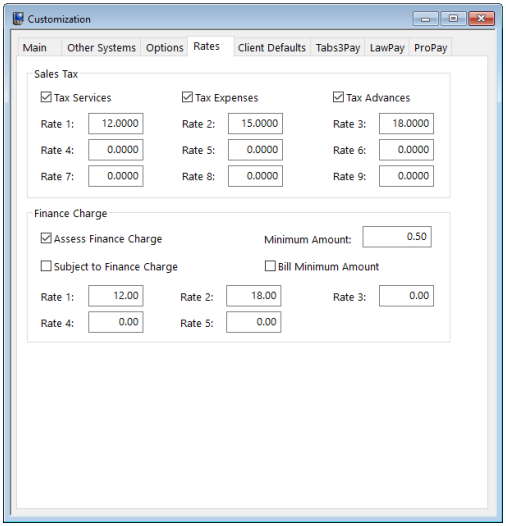


*Figure 35, Tabs3 Billing Customization - **Rates** tab*

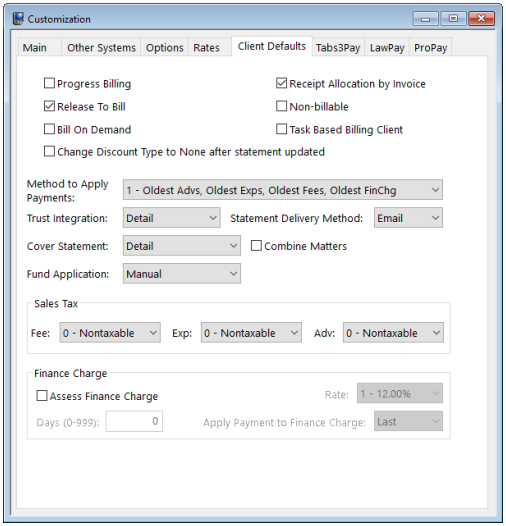


*Figure 36, Tabs3 Billing Customization - **Client Defaults** tab*

▶ Configuring the Tabs3 Customization Window

1. In the Tabs3 Billing Quick Launch, search for and select "Customization."
2. On the **Main** tab:
   a. The **Key Type** and **Decimal Places** are displayed here for reference, as shown in Figure 33 and described in the **Defining the Format for Clients and Matters** section *(page 29)*.
   b. The **First Month of Reporting Year** field defaults to January, and is displayed here for reference. Most firms use January, but some firms have a fiscal year that starts with a different month. *(Note: This month is different than the current reporting month.)*
   c. If you will be emailing Billing statements, select which **Email Statements Method** will be used. The default is Outlook and can be changed later as desired. *(More Info: More information can be found in Help. A detailed comparison can be found in Knowledge Base article **R11409**, "Comparing Methods for Email Statements.")*
3. On the **Options** tab:
   a. Specify whether you want statements numbered at the firm or client level in the **Statement Numbering** field. *(Note: We recommend numbering at the*

firm level so you can easily search by statement number when entering payments.)

4. On the **Rates** tab:
   a. If your state requires you to charge sales tax on services, expenses, or advances, select the corresponding check box and enter the tax rate in the **Rate 1** field.
   b. If you would like to charge finance charge on past due balances, select the corresponding check boxes and enter the annual rate in the **Rate 1** field (e.g., enter 12.00 if you charge an annual finance charge of 12% per year).
5. On the **Client Defaults** tab:
   a. Specify the defaults that will be used when adding a new client.
   b. If assessing sales tax, under the *Sales Tax* section, select the default sales tax rate.
   c. If assessing finance charge, select the **Assess Finance Charge** check box, the **Rate**, and the number of **Days** past due before the finance charge will be assessed.
6. Click to save the changes, then close Customization.

Note: The **Key Type** and **Decimal Places** fields are shown for reference here and must be changed using the **Change Key Type** utility.

More Info: Detailed information regarding Sales Tax and Finance Charge can be found in Help.

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

Tabs3 Billing Customization Settings

Startup Files

Before using Tabs3 Billing, you may want to review the following startup files and make changes as necessary:

- Timekeeper Level
- Timekeeper
- Category
- Transaction Code (Tcode)
- Billing Frequency
- Optional Files

The following includes information on what information is stored in each of the startup files, as well as step-by-step procedures for adding a record.

Note: If Starter Data was included when the software was installed, the above startup files will already have data. You can review the contents of the separate files and edit as desired.

More Info: Detailed information regarding copying, changing, deleting, or renumbering records can be found in the Help.

Note: The **Key Type** and **Decimal Places** must be the same for Tabs3 Billing, PracticeMaster, and Tabs3 Trust Accounting.

Timekeeper Level

Timekeeper levels are used for grouping similar types of timekeepers. You can optionally classify timekeepers by user defined levels for purposes of default billing rates, productivity reports and fee summaries on statements. Examples of timekeeper levels include senior partner, partner, associate, paralegal, law clerk, secretary, staff, etc. Up to 9 timekeeper levels can be defined. Each timekeeper level can have a 20-character description.

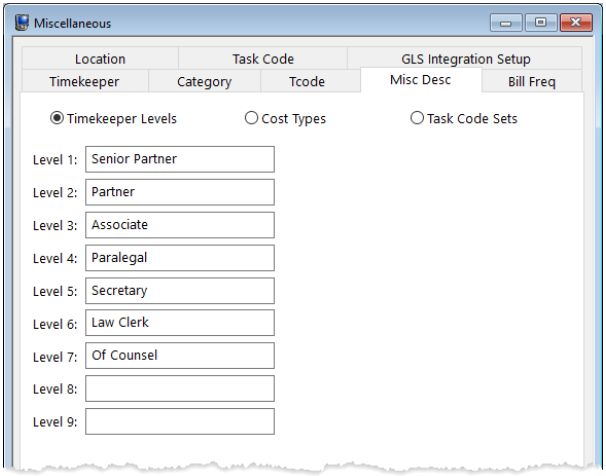


Figure 37, Timekeeper Levels

▶ To add a Timekeeper Level

1. In the Tabs3 Billing Quick Launch, search for and select "Timekeeper Level Descriptions."
2. Enter the desired timekeeper levels.

Timekeeper

Timekeepers are different than users. Users represent anyone who uses the software, or a resource that needs to be scheduled, such as a particular conference room. Tabs3 Billing refers to a timekeeper as any person whose time is entered and/or billed, such as attorneys, accountants, clerks, paralegals, secretaries, etc.

Each timekeeper is assigned a timekeeper number, name, initials, timekeeper level classification, and up to six hourly billing rates. Rate 1 is usually designated as the normal billing rate for most clients. Timekeepers can be marked as inactive, which prevents fees and costs from being entered for them.

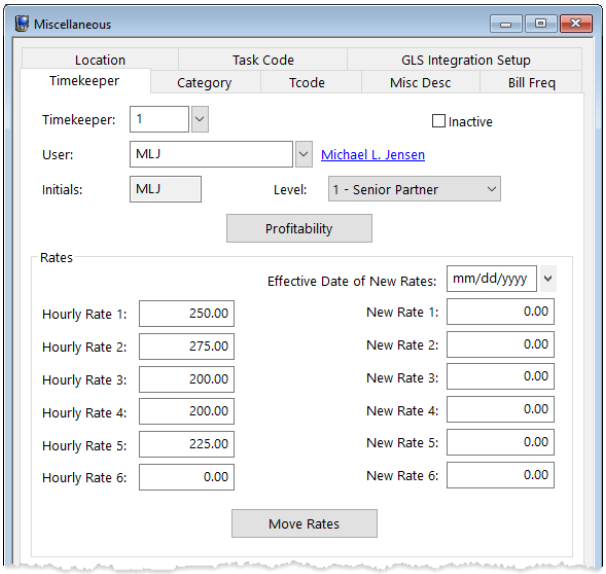


Figure 38, Timekeeper

During the Guided Setup, you have the option to create a timekeeper for yourself. Additional timekeepers can also be configured.

▶ To add a Timekeeper

1. In the Tabs3 Billing Quick Launch, search for and select "Timekeeper Information."
2. Click on the toolbar.
   a. Users with Manager access rights will see the Add New Timekeeper window, which allows them to either start the Add New User wizard (see the **Setting Up Users** section *(page 21)* or start a new timekeeper using the next available timekeeper number. You can accept the automatically assigned timekeeper number or specify a different timekeeper number.
   b. Users without Manager access rights will start a new timekeeper using the next available timekeeper number. You can accept the automatically assigned timekeeper number or specify a different timekeeper number.

3. Enter the remaining information for the timekeeper.
4. Click on the toolbar to save the new timekeeper.

Category

A category is an area of practice. Categories are used to classify fee services into related groups for reporting purposes in Tabs3 Billing. Examples of categories include Personal Injury, Workers' Compensation, Real Estate, Family Law, Pro Bono, Consulting, Individual Tax, Corporate Tax, Audit, etc.

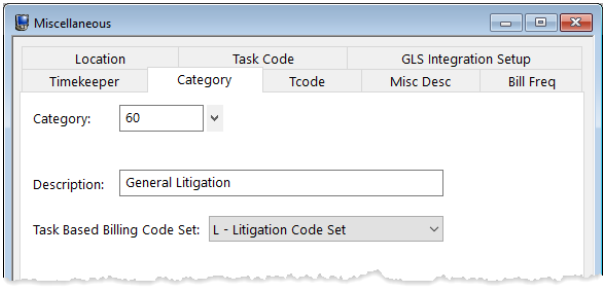


Figure 39, Category

Each category is assigned a number and a description of up to 30 characters.

▶ To add a Category

1. In the Tabs3 Billing Quick Launch, search for and select "Category Information."
2. Click on the toolbar. You can accept the automatically assigned category number or specify a different category number. The automatically assigned category number defaults to the first available category number.
3. After specifying the category number, enter the description and optional Task Based Billing Code Set for the category.
4. Click on the toolbar to save the new category.

Transaction Code (Tcode)

The term transaction code refers to the types of activities or services performed that relate to fees and costs charged to clients and the resulting payments made by the client. Transaction codes are also referred to as tcodes. Transactions are classified as fees, costs, payments, and client funds transactions.

Up to 999 transaction codes can be defined. Each transaction code is assigned a number, an abbreviation (Alpha Code) and a default description. Up to 1,000 characters are allowed

in the default description; however, additional text can be added when fees and costs are entered. Each transaction code is designated as a fee, expense, or advance transaction (i.e., the Trans. Type field) and also has a designated Type of 0-9. The Type is used to specify how Tabs3 Billing will treat a transaction. A Type 0 (normal) transaction code will be the most frequently used transaction code type. It represents a normal transaction such as fee, expense, and advance charges. Types 1 through 3 designate the transaction as a regular, fee or cost payment, respectively. A Type 4 transaction code is "description only" and will not allow an amount or number of hours to be entered. Type 5 transactions are miscellaneous transactions that are used for making a fee or cost entry when there is no predefined description that fits your needs or to print the transaction code as a separate item when subtotaling. A Type 6 transaction code is set aside specifically for progress fees.

Examples of fee transactions include office conference, telephone conference, review correspondence, prepare motions, etc.

Tabs3 Billing classifies costs as either advances or expenses. Cost advances are "out of pocket" costs that are incurred by the firm on behalf of the client. Cost advances are often used to reflect "hard" costs or "direct" costs. Examples of cost advances are witness fees, medical costs, filing fees, etc. Client expenses, on the other hand, are costs incurred by the firm without a direct cash outlay. Expenses are considered "soft" costs or "indirect" costs. Examples of client expenses are photocopy expenses, documentation preparation, per diems, etc. In addition to classifying costs as expenses or advances, Tabs3 Billing also gives you the ability to further categorize expenses and advances by Cost Type.

Best Practice: Tabs3 Billing ships with a default set of transaction codes in the starter data. You can use these standard transaction codes until you decide what other transaction codes your firm requires. Alternatively, you can get started by defining just three transaction codes: one Type 0 transaction code for fees; another Type 0 transaction code for expenses; and one Type 1 transaction code for payments.

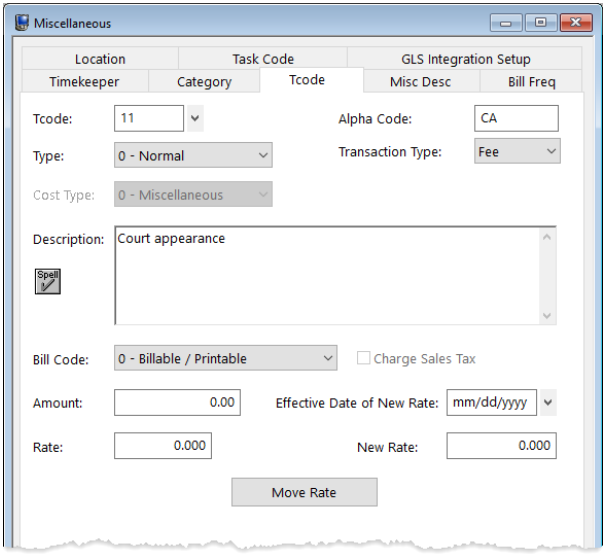


Figure 40, Tcode

▶ To add a Transaction Code

1. In the Tabs3 Billing Quick Launch, search for and select "Transaction Code Information."
2. Click on the toolbar. You can accept the automatically assigned tcode number or specify a different tcode number. The automatically assigned tcode number defaults to the first available tcode number.
3. After specifying the tcode number, enter the remaining information for the transaction code.
4. Click on the toolbar to save the new transaction code.

Billing Frequency

Billing frequencies are used by Tabs3 Billing to designate different billing intervals for clients and matters and can be used to filter statements and reports. Each billing frequency consists of an 8-character Billing Frequency ID, a single character for reporting purposes, and a description of up to 40 characters. For example, if your firm bills all of its clients on the same day once a month, then you only need to define one billing frequency. You might call it "Monthly", give it a description of "Monthly Billing Clients", and a Report

Character of "M". Other billing frequency examples include quarterly billing frequencies, on demand clients, contingency clients, bi-monthly frequencies, etc.

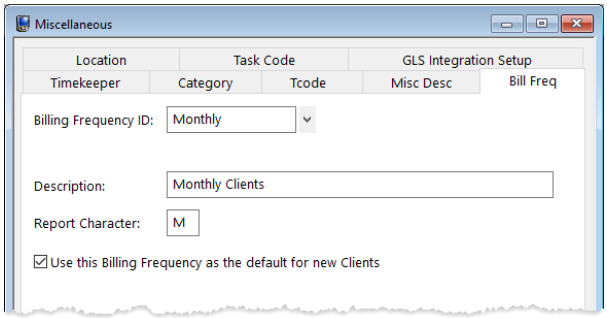


Figure 41, Billing Frequency

▶ To add a Billing Frequency

1. In the Tabs3 Billing Quick Launch, search for and select "Billing Frequency Information."
2. Enter the following information:
   a. In the **Billing Frequency ID**, enter up to 8 characters to identify the billing frequency.
   b. In the **Description** field, enter up to 40 characters to describe the billing frequency.
   c. In the **Report Character** field, enter a single character to identify the billing frequency on reports, usually a letter from A to Z.
3. Click on the toolbar to save the billing frequency.

Optional Files

The following table includes a list of optional files that your firm may be interested in defining. Detailed information regarding these files can be found in Help.

Best Practice: Tabs3 Billing ships with a default set of cost types, task code sets, and task codes. You can use this default information until you decide whether your firm will be using these files.

File Name	Home Page Location	Description
Location	*All Actions* | *Setup* | *Location Information*	Define locations for firms with offices in separate locations. Reports and statements can be generated for clients assigned to specific locations.
Cost Types	*All Actions* | *Setup* | *Cost Type Descriptions*	Define optional cost types for grouping similar types of costs for reporting purposes.
Task Code Sets	*All Actions* | *Setup* | *Task Code Set Descriptions*	Task code sets are used in conjunction with task based billing. Use this option to modify the name of each set of task codes.
Task Codes	*All Actions* | *Setup* | *Task Code Information*	Define Phase/Task codes, Activity codes, and Expense code for task based billing purposes.

Clients and Contacts

Once the startup files have been defined, you can enter clients and contacts. Contact records store address, phone, and email information. Separate contact records can be maintained for organizations and individuals. When you have a client that is an organization, you can define a contact record for the organization as well as separate contact records for each person associated with the organization. Maintaining separate contact records makes it possible to synchronize all of your contacts and clients in PracticeMaster with Outlook and smartphones.

When you add a client, a contact record is created for the individual or organization. Contact records can be used by other clients and matters.

More Info: Details regarding client and contact functionality can be found in the ***Clients & Contacts Guide*** and in Help.

Secure Client Note: Contact information for secure clients (i.e. address/phone/email) is stored and edited in the Client file, rather than the Contact file. This is because contact records cannot be marked as secure; contact information is viewable by all users with browse rights to the Contact file. Likewise, address information for clients in matter mode is stored and edited in the Client file.

Training Videos

You can view the following training videos for more information. Clicking a link will open the associated training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

Getting Started with Clients

Selecting a Transition Date

You will want to choose a transition date when you start using Tabs3 Billing for the first time. The transition date will serve as a point of reference for existing clients' accounts receivable balances and work-in-process balances being transferred to Tabs3 Billing from your previous method of time accounting and billing.

When first starting to use Tabs3 Billing, if desired, you can enter the information for each client excluding accounts receivable information. You can then come back later and enter accounts receivable information, provided this is done *before* running final statements for the client. This strategy has the advantage of allowing you some flexibility in determining the exact transition date for accounts receivable.

Entering Accounts Receivable Balances

There are different methods that can be used to implement beginning accounts receivable balances.

- **Method 1:** - **Entering Balances via the Client File**
  Accounts receivable figures can be entered in the Client File. Balances are entered on the **A/R & Fund Balances** tab.
- **Method 2:** - **Entering Transactions and Running Final Statements**
  Accounts receivable figures can be generated by entering fee and cost transactions for the accounts receivable balances, and then running final statements with the transactions and updating those statements.
- **Method 3:**- **Custom Conversion**
  A custom conversion can be performed. Contact your Tabs3 Software consultant or the Tabs3 Sales Department for more information.

Aging of accounts receivable is based on the date of each statement.

The following table includes the pros and cons of each method.

Method	Pros	Cons
Method 1: Entering Balances via the Client File	• Fast • Can break out fees, expenses, advances, sales tax, and finance charge	• No aging for balances consisting of multiple statements • No breakdown by Working Timekeeper or Cost Type • Receipts will be allocated to a single designated R/A Timekeeper, Expense Cost Type 0, and Advance Cost Type 0
Method 2: Entering Transactions and Running Final Statements	• Can break out fees, expenses, advances, sales tax, and finance charge • Optionally include breakdown by working timekeeper and/or cost type • Optionally run separate statements for aging purposes • Provides greatest detail	• Takes longer • Calculated finance charges may not match original finance charge amount • Sales tax may be calculated differently than originally billed
Method 3: Custom Conversion Customized to your specifications	• Customized to your specifications from any software	• Additional charges • Additional time required

Method 1: Entering Balances via the Client File

Accounts receivable information can be entered on the **A/R & Fund Balances** tab of the Client Information window. When entering initial accounts receivable balances using the Client Information window, you can use one of the following methods:

- Enter one total amount due in the **Fees Due, Expenses Due** or **Advances Due** field; or
- Enter separate amounts in the **Fees Due**, **Expenses Due** and **Advances Due** fields.

Additionally, amounts can be entered for Finance Charge Due, Fee Sales Tax Due, Expense Sales Tax Due and Advance Sales Tax Due. The **Last Statement Date** can be specified for aging purposes and assessing future finance charges on past due balances. All of the

remaining fields (dates and payment information) are optional and are only printed on reports to provide statistics about the client.

Note: When using this method, a client's accounts receivable balance *must* be entered before a final statement is run for the client.

When a new client is added with balance due information on the **A/R and Fund Balances** tab, a client ledger record is automatically created for that client. Likewise, whenever an existing client who has never been billed is changed from a zero balance due to a non-zero balance due, a client ledger record is automatically created for that client.

This client ledger record is a statement record and includes all of the amounts entered on the **A/R & Fund Balances** tab.

- Any fees due entered are attributed to the specified **R/A Timekeeper** on that tab *(if no **R/A Timekeeper** is specified, then the primary timekeeper is used instead)*.
- Any expenses due are attributed to expense cost type 0.
- Any advances due are attributed to advance cost type 0.
- The **Last Statement Date** on the **A/R & Fund Balances** tab is used as the date of this client ledger record. If a **Last Statement Date** is not entered, the **Date Opened** from the **Address** tab of client information is used.

Once a client ledger record has been created for the client (either by adding an accounts receivable balance or by updating a statement), the accounts receivable fields on the **A/R & Fund Balances** tab of client information become read-only and cannot be edited.

If you want to break down the accounts receivable by working timekeeper and cost types, instead of using this method, you will need to enter separate transactions for each timekeeper and cost type using the Fee Entry and Cost Entry windows (i.e., Method 2).

If you want to break down the balance that clients owe you into separate statement amounts for aging purposes, instead of using this method, you can do this by final billing and updating transactions on separate statements with corresponding statement dates (i.e., Method 2). However, this is a time consuming task.

In summary, the advantage of entering accounts receivable balances via the Client file is that it is quick. Disadvantages include: 1) Only one aging period is used for the aggregate past due balance; and 2) The fee amount due is automatically applied to the R/A Timekeeper for the client (specified on the **A/R & Fund Balances** tab of the Client file), the expense amount due is automatically applied to Expense Type 0, and the advance amount

due is automatically applied to Advance Type 0. Therefore, when payments are allocated, they will automatically be allocated to the R/A Timekeeper, Expense Type 0 and/or Advance Type 0.

Method 2: Entering Transactions & Running Final Statements

As an alternative to entering balance due information on the **A/R & Fund Balances** tab of the Client file, you can enter fee, expense, and advance transactions for past due information, run a final statement with those transactions, and update the final statements. If you want to use this information and retain accurate aging information and billing history, you would have to repeat it for *each* past due statement for *each* client. This method has the disadvantage of taking considerably longer to accomplish. However, it has the advantages of maintaining accurate previous historical information.

If you want to maintain billed and due information for each timekeeper and/or cost type, you must use this method.

Sales Tax Note: If you want sales tax tracked separately, you can configure Tabs3 Billing for sales tax and enter the fee and transactions with amounts that exclude the sales tax. Alternatively, you can include sales tax in the transactions that you enter; however, receipts will not be allocated to sales tax.

Finance Charge Note: Because finance charge is always calculated, we recommend using the following method for entering beginning finance charge balances. Set up a separate finance charge transaction code using an Expense or Advance Cost Type. Enter a separate transaction for the cumulative finance charge amount (or a separate transaction for finance charge for each statement). This method will let you track payment allocations for finance charge under the designated cost type. *(Note: When using this method, do not enable finance charge until after you have completed entering the initial balances. Be aware that once finance charge is enabled, finance charge will be assessed on the past due expense/advance balances. Reports will show payments as allocating towards the designated expense or advance cost type.)*

Method 3: Custom Conversion

Firms who are converting from other software systems may want to investigate the possibility of having a custom conversion performed. For decades, we have successfully transitioned law firms to Tabs3 Software by performing custom data conversions. We tailor

each conversion because each firm has unique requirements and uses the software differently. If you're interested, contact your Tabs3 Software consultant or request more information and a price estimate at **www.Tabs3.com/conversions**.

Examples for Entering A/R Balances

The following illustrates variations on how you might enter initial accounts receivable balances for a client using Method 1 and Method 2.

For example, let's say a client has the following balance due as of the selected transition date.

Statement Date	Statement Amount	Fees Due	Expenses Due
March 31	$500	$400	$100
April 30	$300	$250	$50
Total		**$650**	**$150**

- ***Method 1 Options*** **- Enter Balances via the Client File**
  - If you want the amounts due broken down for fees and expenses, you would enter $650 in **Fees Billed**, $150 in **Expenses Billed** and April 30 for the **Last Statement Date**. If desired, you could specify a single **R/A Timekeeper** for receipt allocation purposes.
  - If you want a simple lump sum for the total amount, you would instead enter $800 in **Fees Billed** and a **Last Statement Date** of April 30.
- ***Method 2 Options*** **- Entering Transactions and Running Final Statements**
  - If you want amounts due broken down by aging period, you would enter four transactions:
    - a fee transaction dated March 31 for $400,
    - a fee transaction dated April 30 for $250,
    - an expense transaction dated March 31 for $100; and
    - an expense transaction dated April 30 for $50.
  - Once all transactions are entered for all statements for all clients, you would run batches of final statements and update the final statements using a process similar to the following. It is important to note that the Update Statements utility must be run in between each final statement.

    - Run a final statement dated March 31 using a March 31 cut-off date.
    - Run the Update Statements utility for the March 31 statement.
    - Run a final statement dated April 30 using an April 30 cut-off date.
    - Run the Update Statements utility for the April 30 statement.
- If you want amounts due broken down by timekeeper, you would use a process similar to the one above, but instead of a single fee transaction for each statement, you would enter separate fee transactions for each working timekeeper for each statement.

Entering Work-in-Process Balances

If any of your clients have work-in-process as of your transition date, you will need to enter this information using the Fee Entry, Cost Entry, and Payment Entry windows.

Tip: Use a date for the work-in-process entries that is prior to your transition date. For example, if you have selected a transition date of April 1, enter the work-in-process transactions using the date that the transaction actually took place or a date of March 31 (as opposed to an April date). This will allow for accurate April figures in the Worked section of the Timekeeper and Category Productivity Reports.

There are three methods of transferring the fees from your previous billing system:

- Make multiple fee entries for each client. This method gives you the most detail for client statements and the most accuracy for productivity reports. It also takes the most time to transfer work-in-process from your previous system; or
- Make one fee entry for each timekeeper for each client that has work-in-process; or
- Set up a timekeeper called “WIP CARRY-OVER”. Make one fee entry for each client that has work-in-process. This method has the advantage of being the quickest method of transferring work-in-process balances. However, the disadvantages include the inability to allocate payments and productivity to working timekeepers.

In addition to entering fee work-in-process, you must also enter any expenses and advances that have not been billed. You can do this one of two ways:

- Make individual expense and advance entries for each client. This method gives you the most detail for client statements. It also takes the most time to transfer work-in-process information from your previous system; or
- Set up two transaction codes called “WIP CARRY-OVER,” one for expenses and one for advances. Make one cost entry for each client for each transaction code for the total amount of expenses/advances unbilled at the time of starting Tabs3 Billing. This method has the advantage of being the quickest method of transferring work-in-process balances. However, one disadvantage is the inability to allocate payments and productivity to cost types.

Billing Rates

Tabs3 Billing is extremely flexible when it comes to defining billing rates. The two most common methods of defining rates are the timekeeper rate and the client rate table.

- You already defined timekeeper billing rates when you set up the **timekeeper file** *(page 44)*.
- You can define unique billing rates by client for each timekeeper if desired. These rates are defined in a client rate table, which is accessed in the Tabs3 Billing client file via the **Rates** tab.

A complete discussion of the different billing methods and ways to set hourly rates can be found in the ***Billing Methods Guide***.

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

How Rates Work

Effective Date of New Rates

Fee Compensation Rules

Tabs3 Billing provides the ability to define Fee Compensation Rules that can be used to designate exactly how you want fee receipts allocated. These rules provide the ability to define multiple originating timekeepers, threshold amounts and effective date ranges.

Fee compensation rules are defined for clients via a fee compensation rules table. Fee compensation rules provide the ability to specify a percentage of a client's fee receipts that you want allocated to a specific primary, secondary, or originating timekeeper or to the firm. Each table can include multiple rules. You have the ability to create rules for multiple originating, primary, and secondary timekeepers as well as multiple rules for the same timekeeper. Rules can be based on a percentage of receipts from:

- all working timekeepers
- selected working timekeepers
- all working timekeepers assigned to a specific timekeeper level
- statements within a specified date range
- accumulated receipts within an amount range.

For example, your firm may want to allocate 10% of all fees received to the originating timekeeper. Or you may want the primary timekeeper to receive 3% of all fees received and the firm to receive 1.85% of all fees received. Perhaps you want 25% of all fees received up to the first $1,000 allocated to a specific timekeeper and 2% of all fees received through December 31 allocated to the primary timekeeper. You may want to allocate a specific percentage of all fees received for paralegal billings to the originating timekeeper. The combinations are endless.

You can define custom rules tables for each client. Or, you can define a table and share it with other matters.

▶ To define a fee compensation rules table

1. In the Tabs3 Billing Quick Launch, search for and select "Client Information."
2. Click the **Setup** tab.
3. Under *Payment Settings*, click the **Fee Compensation Rules** button.

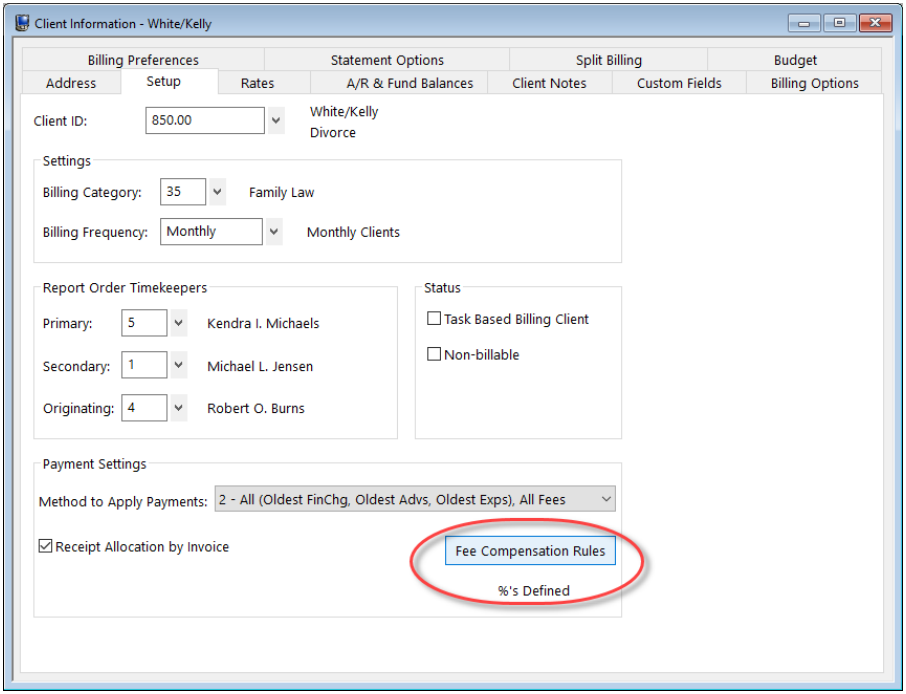


*Figure 42, **Fee Compensation Rules** button*

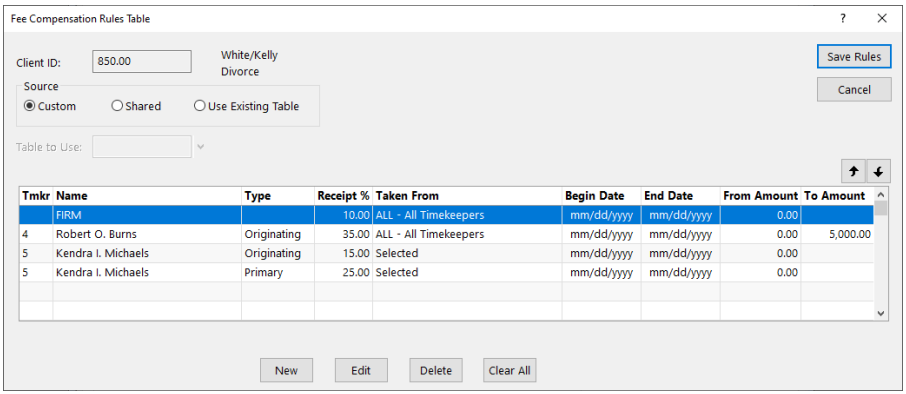


Figure 43, Fee Compensation Rules Table

Tip: If no fee compensation rules are defined, fees will be allocated based on working timekeeper. If you want to define fee compensation rules, define them before entering payments.

More Info: Complete details regarding fee compensation rules can be found in Help.

Methods of Billing

Tabs3 Billing provides the ability to implement the following different billing methods:

- Hourly Billing
- Contingency Billing
- Flat Fee Billing
- Value Billing
- Progress Billing
- Retainer Billing
- Split Billing
- Task Based Billing
- Threshold Billing

More Info: Complete details regarding each of these billing methods can be found in the ***Billing Methods Guide*** and in Help.

Training Videos

You can view the following training videos for more information. Clicking a link will open the associated training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

Contingency Billing

Flat Fee Billing

Split Billing

eBilling Using Tabs3 and Taskbill

Statements

Tabs3 Billing lets you customize statements to print the way you want them to look. You can mail or email statements as PDF files to your clients. Generate all of the emails and PDFs at once and automatically insert variables such as the last payment date, outstanding balance, and other client information into the email. You can generate statements for any client or group of clients. Use the Pre-Bill Tracking feature to print draft statements and track which ones are still under internal review.

More Info: The ***Statements Guide*** discusses the billing process, how to run statements, how to use Pre-Bill Tracking, and other statement related utilities in Tabs3 Billing.

More Info: The ***Statement Formatting Guide*** includes detailed information on how to format statements to meet your firm's needs.

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

Statement Generation Basics

Setting Up the Statement Printer

Tabs3 Billing has additional printer configuration options for statement printers.

▶ To define the statement printer options

1. In the Tabs3 Billing Quick Launch, search for and select "Print Setup."
2. The Printer Setup window will open.
3. In the **Printer** field, select the desired statement printer.
4. Click the **Statement Setup** button to configure the different statement printing options.

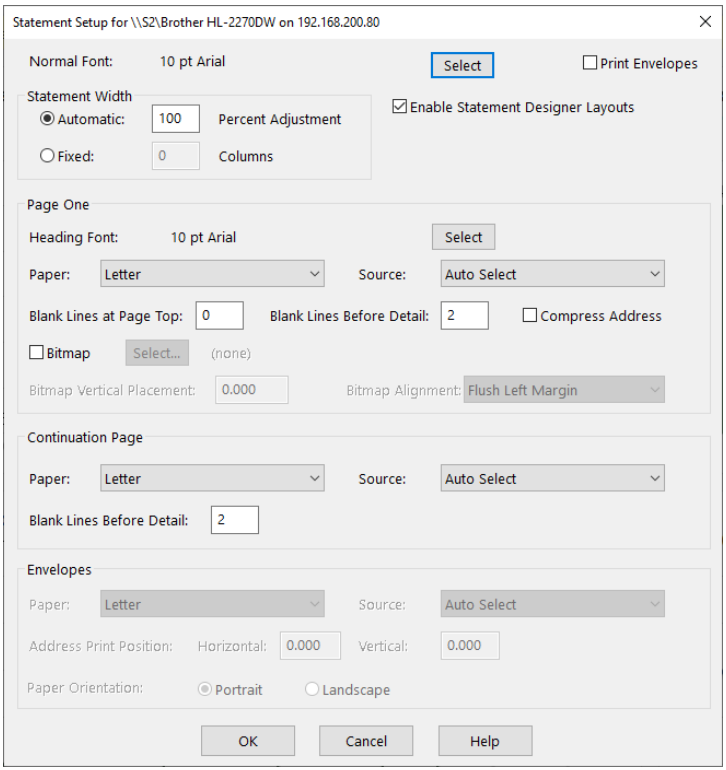


Figure 44, Statement Setup

More Info: Complete details regarding print options can be found in Help.

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

Tabs3 Billing Basics

Setting Up PracticeMaster

Until you are ready to start using individual features in PracticeMaster, there are just a few settings that you will want to implement. Additional detailed information regarding how to customize PracticeMaster for your firm can be found in the ***Customizing PracticeMaster Guide***.

Customization

Default settings for PracticeMaster are pre-configured; however, you can change these options at any time. To access Customization in the PracticeMaster Quick Launch, search for and select "Customization." The Customization window consists of two tabs - the **Main** tab and the **Documents** tab. You need to define your **Key Type** and **Decimal Places**. If you are using Tabs3 Billing, you need to make sure the **Key Type** and **Decimal Places** match those defined in Tabs3 Billing Customization. Details regarding these fields can be found in the **Defining the Format for Clients and Matters** section *(page 29)* of this guide and in Help.

You can leave the History Tracking options at the default. The options on the **Documents** tab can be configured when you are ready to use Document Management. Detailed information can be found in the ***Document Management Guide***.

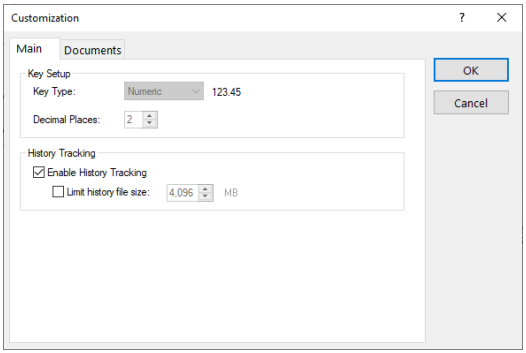


*Figure 45, PracticeMaster Customization - **Main** tab*

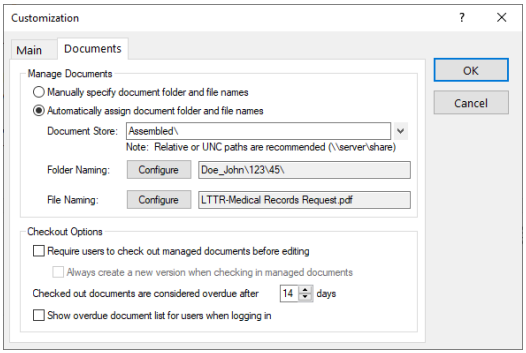


*Figure 46, PracticeMaster Customization - **Documents** tab*

Worldox Note: In order to avoid conflicts, users who manage their documents using World Software Corporation's Worldox® should *not* configure PracticeMaster to **Automatically assign document folder and file names**.

Using PracticeMaster without Tabs3 Billing

When using Tabs3 Billing, many settings and data files that are set up in Tabs3 Billing are mirrored over to PracticeMaster. However, if you are using PracticeMaster without Tabs3 Billing, you will need to set up the information shown in the following table. This table includes links and page number references with details on how to set up the files.

Completed	Data	Information
	Key Type	page 29
	Timekeepers	page 44
	Categories	page 45
	Tcodes	page 45
	Task Codes	page 48
	Location	page 48

Clients and Contacts

Client and contacts entered in Tabs3 Billing are automatically saved in PracticeMaster.

More Info: Details regarding client and contact functionality can be found in the ***Clients and Contacts Guide*** and in Help.

Secure Client Note: Contact information for secure clients (i.e. address/phone/email) is stored and edited in the Client file, rather than the Contact file. This is because contact records cannot be marked as secure; contact information is viewable by all users with browse rights to the Contact file. Likewise, address information for clients in matter mode is stored and edited in the Client file.

Training Videos

You can view the following training videos for more information. Clicking a link will open the associated training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting “Training Videos,” and at **Tabs3.com/video**.

Getting Started with Clients

Contact Categories

PracticeMaster allows you to create categories for your contacts, thus making it easy to view contacts by category. By default, PracticeMaster includes the following contact categories:

- Attorney
- Client
- Client Contact
- Court
- Court Reporter
- Judge

You can add contact categories as desired to fit your firm's needs. Examples of other categories include Expert Witness, Investigator, Insurance Adjuster, Doctor, Hospital, Medical Provider, Personal, etc. Up to 20 contact categories can be assigned to each contact. Contact categories are optional. Although you can add contact categories at any time, you may want to add the contact categories now for those categories that you know your firm will use.

▶ To add a Contact Category

1. In the Quick Launch, search for and select "Contact File."
2. Click the **Contact** tab right of the **List** tab.
3. Find the **Contact Category** field and click the button on the right side to open the Contact Categories window.
4. Click **New**.
5. Enter the desired Contact Category.
6. Click **OK** to save the new Contact Category.

Contact categories can be used to filter which contacts you want to synchronize to Outlook and your smartphone.

Note: Users must be assigned to an access profile with the Add Contact Category access right to add Contact Categories.

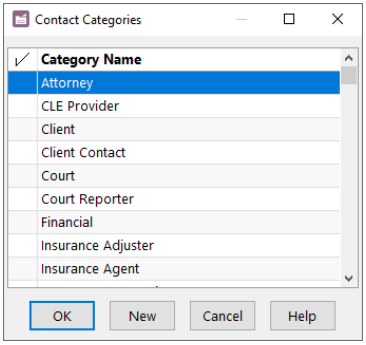


Figure 47, Contact Categories window

Outlook Synchronization

If desired, you can synchronize your Outlook contacts into PracticeMaster, thus allowing you to easily create clients from the contact records. Step-by-step procedures to do this can be found in Knowledge Base Article **R11366**, "Configuring PracticeMaster/Microsoft Outlook Calendar & Contact Integration."

Areas of Practice

Although you can start using PracticeMaster out of the box, when you are ready to start using PracticeMaster for managing your matters, you will want to take the time to customize the files to meet your firm's needs.

You can set up separate Areas of Practice for the various types of law practiced. Each Area of Practice has separate files for tracking unique information. For example, you might have a Family Law area of practice, a Business Law area of practice and a Criminal Law area of Practice.

- The **Family Law** area of practice might have separate files for Assets, Debts, Spouse Information, Income, Expenses, Children, etc.
- A **Business Law** area of practice might have separate files for Board of Directors, shareholders, Financial Institutions, Signatories, etc.
- A **Criminal Law** area of practice might have files for Witnesses, Prior Convictions, Bonds, Plea Bargains, etc.

One of the easiest ways to get started with creating your firm's areas of practice is to gather all documents and intake forms related to that area of practice. Once gathered, highlight all of the areas that are unique to the matter. Use this information to build or modify the files in your area of practice.

More Info: Details regarding how to set up Areas of Practice can be found in the ***Customizing PracticeMaster Guide*** and in Help.

Calendars

The PracticeMaster Calendar is one area that most firms begin using right away in PracticeMaster. You will want to set up calendar codes, calendar groups, and calendar rights.

Calendar Codes

Just like Outlook, PracticeMaster categorizes calendar entries as Events (i.e., appointments) or Tasks. You can also further categorize calendar records by calendar code.

PracticeMaster starter data includes default calendar codes. We recommend you review the current calendar codes and add calendar codes that your firm requires.

▶ To view calendar codes

1. In the PracticeMaster Quick Launch, search for and select "Calendar Code File."
2. The **List** tab includes a list of Calendar Codes.

▶ To print a list of calendar codes

1. In the PracticeMaster Quick Launch, search for and select "Report Writer."
2. Highlight the **Cal_Code** report Name in the Report Writer window.
3. Click **Print.**

▶ To add a calendar code

1. In the PracticeMaster Quick Launch, search for and select "Calendar Code File."
2. Click the button.
3. In the New Lookup Record window, specify a key value in the New Key field. The key value is an up to 8-character label for the calendar code.
4. Click **OK**.
5. In the Calendar Code window, specify the settings for the Calendar Code.
6. Click the button and close the Calendar Code window.

Groups

To use the calendar efficiently, you will want to make use of groups for calendaring and scheduling purposes.

Smaller firms with just 1 or 2 users may not use groups. However, groups are particularly useful for firms with multiple employees. For example, perhaps one particular attorney always works with one particular paralegal and one particular secretary. You may want to set up a group with these 3 users for ease in scheduling. Perhaps you may want a group for all attorneys, a group for all paralegals, a group for all clerical employees. You will want to assign a person in the firm responsibility for maintaining the various groups as new employees are hired.

▶ To print a list of groups

- In System Configuration, select the ***Reports | Group List*** menu option.

▶ To add a group

- Refer to the steps in the **Contacts** section *(page 28)* of this guide for information on adding a group.

Calendar Rights

If your firm is okay with all users seeing all calendar records on the PracticeMaster calendar, you do not need to set up calendar rights. However, many firms want more control over who sees which calendar records. Calendar records are considered public or private. Calendar records are public unless the **Private** check box for the calendar record is selected.

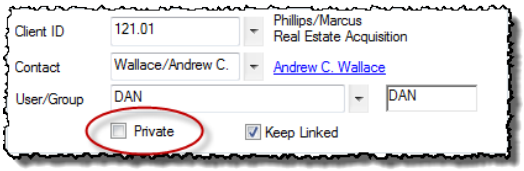


*Figure 48, **Private** check box in Calendar record*

Calendar rights are defined at two different levels. First of all, you can define which users can view the calendar. Users who have this right can view all public calendar entries for all users. This particular right is defined in the access profile.

▶ To create an access profile

- Refer to the steps in the **Access Profiles** section *(page 19)* of this guide for information on adding an access profile.

▶ To verify the Calendar Display access right in an Access Profile

1. In System Configuration, select the ***File | Open | Access Profile*** menu option.
2. The Access Profile window will be displayed.
   a. In the groups of functions under the **Access Name** field, select **Calendar**.
   b. In the list of **Functions**, the first item listed is **Calendar Display**.
   c. Click **Allow** if you want to allow access to view the calendar. Otherwise click **Disallow** if you do not want members of this access profile to have the rights to display the calendar.
   d. Click the button and close the Access Profile window.

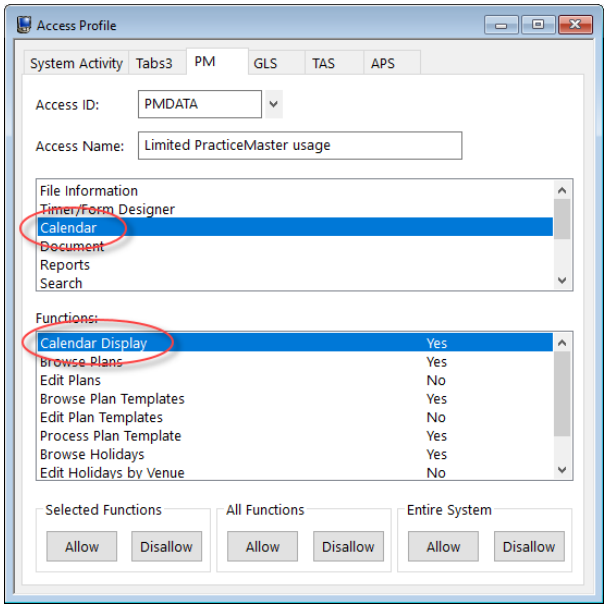


Figure 49, Calendar Display right in Access Profile

The second level of defining user rights is defined in the User ID record. Calendar rights can be defined for each Logon user that is not a manager. Managers have all rights to all calendar records. For each user, you can specify which users have rights to edit public calendar entries.

▶ To create a User ID

- Refer to the steps in the **Users** section *(page 21)* of this guide for how to create User IDs.

▶ To edit Calendar Rights for a User ID

1. In System Configuration, select the ***File | Open | Users*** menu option.
2. Click the button next to the **User ID** and select the user whose rights you want to define.
3. Click the **Calendar Rights** button
4. On the **Rights to this Calendar** tab:
   a. Select the **Allow all users to edit public calendar** if it is okay for all users to edit public calendar entries. Alternatively, if you want to pick and choose which users can edit this user's public entries, clear the **Allow all users to edit public calendar** check box.
   b. Select which users you want to have **Edit Public**, **Browse Private**, and **Edit Private** calendar rights.
5. Click the **Rights to Other Calendars** tab:
   a. If you are a manager, you can select which users this user will have **Edit Public**, **Browse Private**, and **Edit Private** rights for.
6. Click **OK** to close the Calendar Access Rights window.
7. Click to save the changes made to the user.

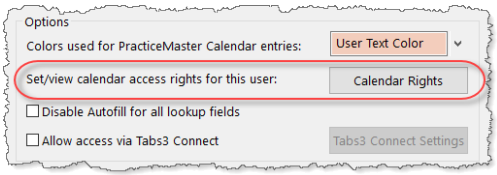


*Figure 50, **Calendar Rights** button in User record*

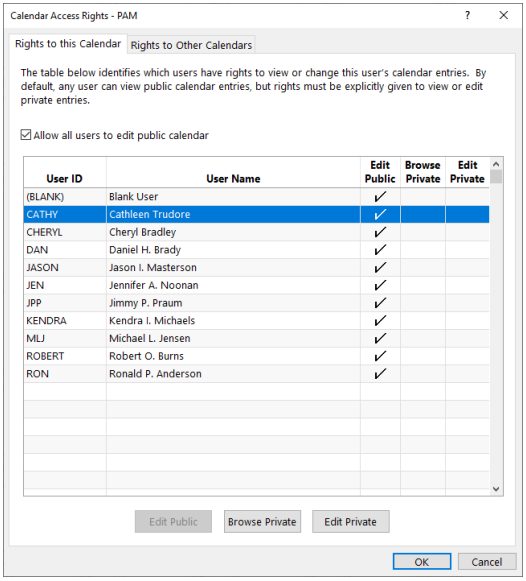


Figure 51, Calendar Access Rights
***Rights to this Calendar** tab*

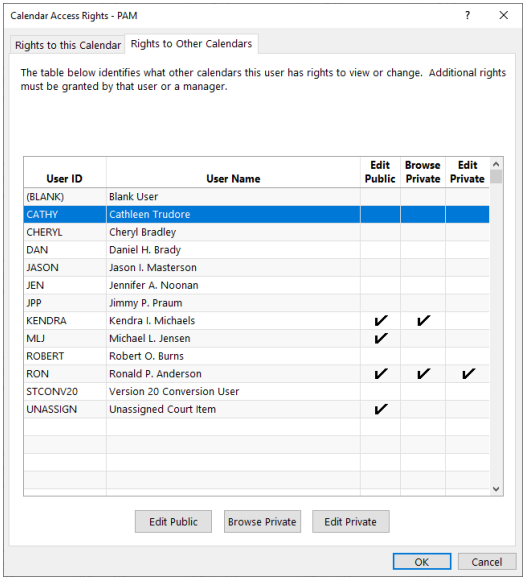


Figure 52, Calendar Access Rights
***Rights to Other Calendars** tab*

Training Videos

You can view the following training videos for more information. Clicking a link will open the associated training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

Calendar Overview

Using Recurring Dates

Convert to Fee Settings

PracticeMaster makes it easy to convert various items into billable fee records. These fee records are automatically mirrored over to Tabs3 Billing for billing purposes. You can convert calendar records, document management records, and journal records to fees, including email, notes, phone, research, and timer records.

▶ To convert a record to a Fee

- Right-click the record and select **Convert to Fee**.

You can define the default settings that are used when users convert records to fees. Settings are saved for each user and must be defined at the user's workstation.

▶ To define default Convert to Fee Settings

1. In the PracticeMaster Quick Launch, search for and select "Convert to Fee Settings."
2. Define the default settings for the record type as follows:
    a. Click the corresponding tab for the desired record type (e.g., Calendar).
    b. Define the settings for that record type.
    c. Repeat steps a and b for each record type.
3. Click **OK** and close the window.
4. Repeat the above procedures for each user.

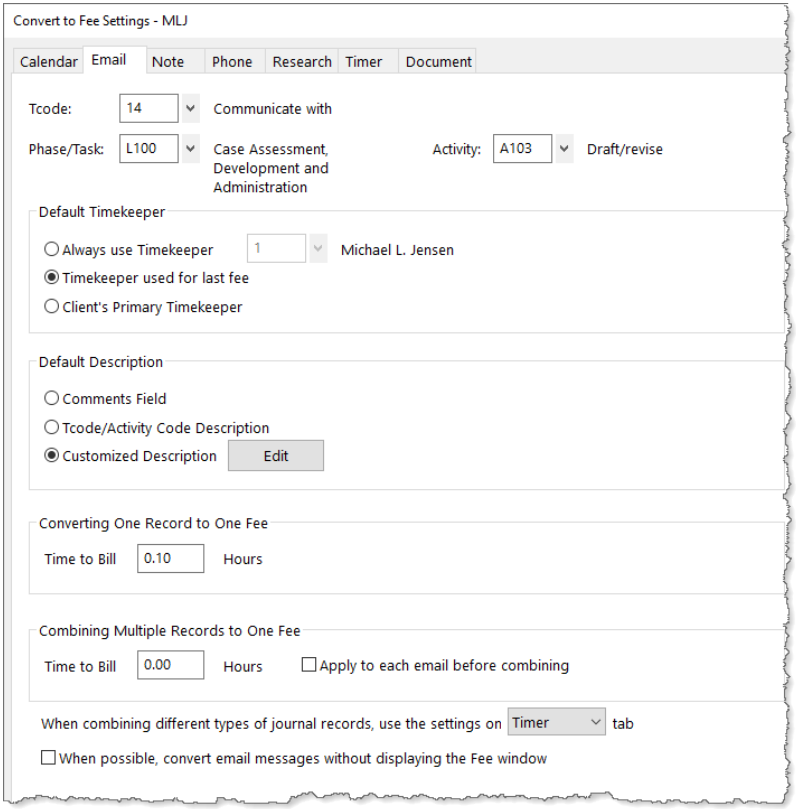


Figure 53, Convert to Fee Settings window

Document Management

When you are ready to start using Document Management, we recommend reading the ***Document Management Guide***.

More Info: Knowledge Base article **R11572** includes the table of contents of the ***Document Management Guide*** and links to other document management resources.

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick

Launch by searching for and selecting “Training Videos,” and at **Tabs3.com/video**.

PracticeMaster Overview

Setting Up Tabs3 Financial Software

Tabs3 Financials software consists of the following applications:

- **Tabs3 Trust Accounting** (Trust) *(page 79)*
- **Tabs3 Accounts Payable** (AP) *(page 89)*
- **Tabs3 General Ledger** (GL) *(page 95)*

The following includes information on configuring these systems and how to transfer starting balances.

More Info: Details on the data entry windows that are used on a daily basis can be found in the ***Trust Accounting Guide***, ***Accounts Payable Guide***, and the ***General Ledger Guide***. Additional information regarding how the software integrates with other Tabs3 Software can be found in the ***Integration Guide***.

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

Tabs3 Financials Overview: *Trust Accounting, Accounts Payable, and General Ledger*

Tabs3 Trust Accounting

Tabs3 Trust Accounting (Trust) is designed to help your firm keep track of the trust accounts your firm manages.

Trust Customization

Default settings for Trust are pre-configured; however, you can change these options at any time. The Customization window consists of three tabs. There are a few fields that must be set before proceeding. Complete details regarding the fields on each tab can be found in Help.

▶ Configuring the Trust Customization Window

1. In the Trust Quick Launch, search for and select "Customization."

2. On the **Main** tab:

   a. The **Key Type** and **Decimal Places** are shown here, as determined by the options selected during the Guided Setup. These values ***must*** match those specified in Tabs3 Billing Customization and PracticeMaster Customization.

   > **Note:** See the Defining the Format for Clients and Matters section *(page 29)* for more information regarding the **Key Type** and **Decimal Places**.

3. Click to save the changes, then close Customization.

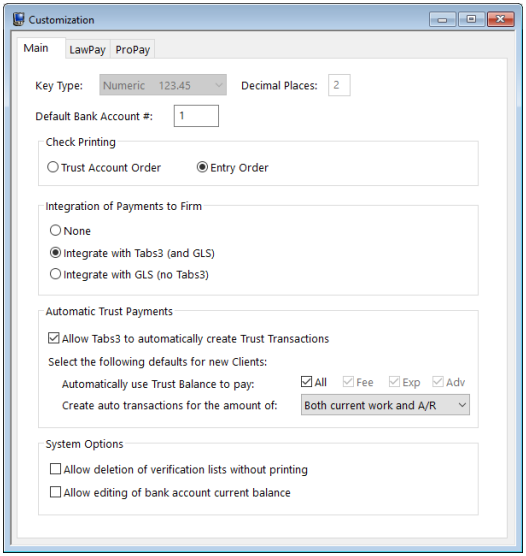


*Figure 54, Trust Customization - **Main** tab*

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

Trust Accounting Customization Settings

Startup Files

Before using Trust, you may want to review the following startup information:

- Attorney
- Bank Account
- Firm 1099 Settings

The following includes information on what information is stored in each of the startup files, as well as step-by-step procedures for adding a record.

Attorney File

Attorneys are used in Trust to designate which attorney is responsible for the Trust Account. Each attorney is assigned a number, name, and initials.

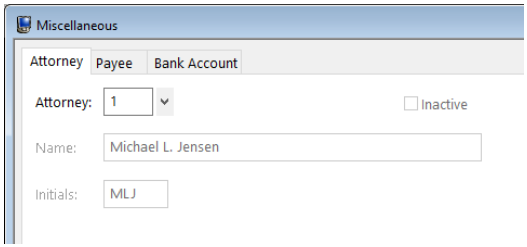


Figure 55, Trust Attorney File

The attorney file in Trust is shared with the timekeeper file in Tabs3 Billing. When integrating with Tabs3 Billing, attorney information must be added, changed, and deleted using Tabs3 Billing. However, if you are not integrating with Tabs3 Billing, you will need to add attorneys in Trust.

During the Guided Setup, you have the option to create a timekeeper for yourself. Additional attorneys can also be configured.

▶ To add an Attorney

1. In the Trust Quick Launch, search for and select "Attorney."
2. Click .
3. Specify the attorney number you want to use.
4. Enter the remaining information for the attorney.
5. Click to save the new attorney.

Bank Account File

You can define one or more bank accounts where trust account funds are deposited.

You have the option of specifying a trust bank account during the Guided Setup. You can define additional bank accounts if necessary.

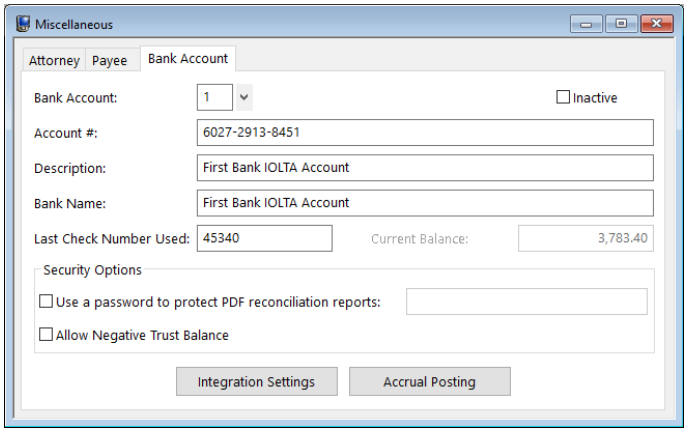


Figure 56, Trust Bank Account

▶ To add a Bank Account

1. In the Trust Quick Launch, search for and select "Bank Account."
2. Press *Ctrl+N* to create a new bank account.
   a. Enter the **Account #** for the bank account.
   b. Enter a **Description** for the bank account.
   c. Enter the **Bank Name**.
   d. Specify the **Last Check Number Used** for this bank account. Trust will increment this field by 1 when you enter a check that has already been printed or Trust prints the next check.
   e. Optionally select the desired **Security Options**.
   f. If integrating with Tabs3 Billing, click the **Integration Settings** button.
      a. Under the *Tabs3 Billing Transaction Codes for Payments* section, specify the Tabs3 Billing payment transaction code you want used when funds are transferred to a client's account.
      b. Click **OK**.
3. Click to save the new bank account.
4. Add any other bank accounts as needed.

Once your bank accounts have been defined, you can add trust accounts and specify which bank account to use for depositing the trust funds.

Firm 1099 Settings

When integrating with Tabs3 Billing, the **This is a payment to our firm** check box can be used to designate funds that are paid from a trust account to your firm. Rarely, some firms may need to issue a 1099 to the firm on behalf of your clients, based on these trust transactions.

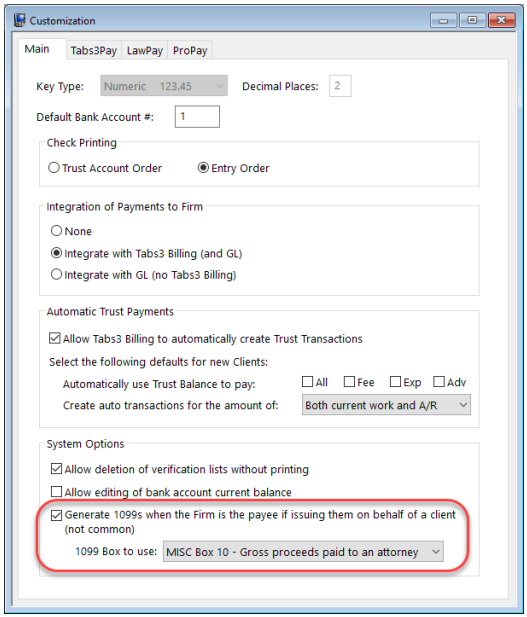


Figure 57, Trust Customization

▶ To specify the Firm 1099 Settings

1. In the Quick Launch, search for and select "Customization."
2. If necessary, select the **Generate 1099s when the Firm is the payee if issuing them on behalf of a client** check box.
3. Select the **1099 Box to use** where the total of all firm payment transactions for the client will be shown.
4. Click to save the payee.
5. In System Configuration, open the Firm Information window and verify your firm's **Federal ID #**.

When entering checks or EFTs (electronic funds transfers), you can select the **This is a payment to our firm** check box. When the **This is a payment to our firm** check box is selected, Tabs3 General Ledger journal entries and Tabs3 Billing payment transactions will be posted at the time the check or EFT is entered. However, if the check number is "0", then the GL journal entries and Tabs3 Billing payment transactions will be created and posted when the check is printed.

Trust Accounts and Trust Transactions

Typical daily use of Trust Accounting generally consists of adding trust accounts and trust transactions.

Trust Accounts	A unique Trust ID is assigned to each individual trust account. Trust IDs use the same client ID as Tabs3 Billing clients and matters. Each trust account is assigned a bank account number.
Trust Transactions	Trust transactions consist of checks, deposits, and EFTs (electronic funds transfers). When first starting to use Tabs3 Trust Accounting, you will need to enter the starting balances for each of your trust accounts as discussed in the following "Trust Account Balances" section. Before you can enter balances, you will need to set up your trust accounts.

More Info: Detailed information on the Trust Account and Trust Transactions windows can be found in the ***Tabs3 Trust Accounting Guide*** and in Help.

Bank Account Reconciliation Note: Keep in mind the Bank Account Reconciliation when deciding how much history to enter. For example, let's say it is May 15 and you are just starting to use Trust. You've decided you do not want to enter all of the historical activity for all trust accounts at this time. However, you would like to start using the Bank Account Reconciliation for the month of May. The bank account has been reconciled with the April bank statement. Therefore, instead of entering a deposit for the trust account's May 15 balance, enter a deposit for the April 30th balance (i.e., the closing balance from the April 30th bank statement). Then, enter trust transactions for all transactions that haven't cleared as of the April 30th balance.

Trust Account Balances

Tabs3 Trust Accounting stores a balance for each trust account and a balance for each bank account. These balances are automatically updated whenever a deposit, check, or EFT transaction is entered.

When first starting to use Tabs3 Trust Accounting, trust account balances can be transferred by entering an initial deposit. Use the Trust Accounts window to set up a trust account. Then, use the Trust Transactions window to enter a deposit for the beginning balance. This deposit can represent the ***original deposit*** used to open the trust account, or it can represent the trust account's ***current balance***.

Initial Deposit Method	Description
Original Deposit	If you elect to enter the amount of the original deposit used to open the trust account, you must also enter trust transactions for all subsequent activity. This method gives you the most detail but also requires the most time for data entry.
Current Balance	If you elect to enter the current balance as the initial deposit instead of all history, you can enter the historical activity at a later time. If and when you decide to enter the historical activity, either delete the deposit transaction used to post the initial balance or enter a negative deposit for the same amount.

Bank Account Reconciliation Note: Keep in mind the Bank Account Reconciliation when deciding how much history to enter. For example, let's say it is May 15 and you are just starting to use Trust. You've decided you do not want to enter all of the historical activity for all trust accounts at this time. However, you would like to start using the Bank Account Reconciliation for the month of May. The bank account has been reconciled with the April bank statement. Therefore, instead of entering a deposit for the trust account's May 15 balance, enter a deposit for the April 30th balance (i.e., the closing balance from the April 30th bank statement). Then, enter trust transactions for all transactions that haven't cleared as of the April 30th balance.

Checks and Forms

Tabs3 Trust Accounting checks and 1099s can be printed on forms from Nelco. Laser or continuous forms can be ordered from Nelco via their website at:

NelcoSolutions.com/Tabs3

More Info: Additional information and frequently asked questions regarding Nelco check forms can be found in Knowledge Base Article **R10978**, "Ordering Tabs3 Software Compatible Checks and Forms from Nelco" *(**support.Tabs3.com**)*.

Configuring Check Printers

Checks are configured at the printer level via the **Check Setup** button in the Print Setup window.

▶ To define the default Trust check printer

1. In the Trust Quick Launch, search for and select "Print Setup."
2. The Printer Setup window will open.
    a. In the **Printer** field, select the desired default printer.
    b. Click **Check Setup**.
        1. Select the desired options for the check printer setup.
        2. Click **OK**.
3. Click **OK** to save the printer settings.

More Info: Additional information regarding printers can be found in the **Setting Up Printers** section *(page 30)* of this guide. Detailed information regarding each option can be found in Help.

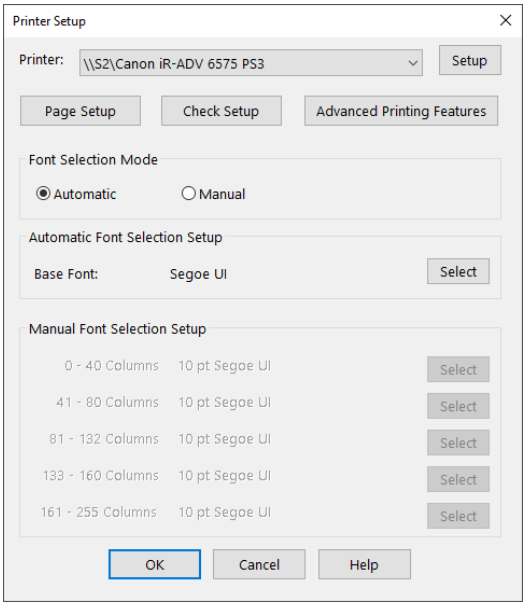


Figure 58, Trust Printer Setup

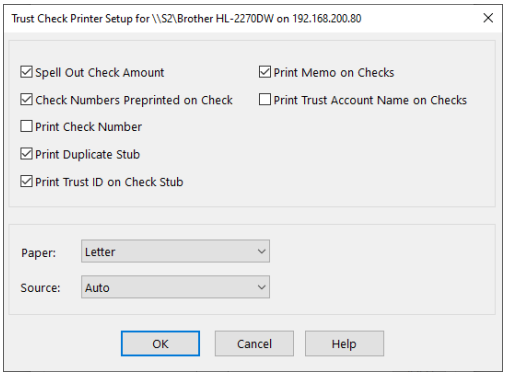


Figure 59, Trust Check Setup

Configuring 1099 Printers

1099 forms are configured at the printer level via the **Printer Setup** button in the Print 1099 Forms window.

▶ To define the default 1099 printer

1. In the Trust (or AP) Quick Launch, search for and select "1099 Forms."
2. On the **Options** tab, select the desired Form (**1099-MISC** or **1099-NEC**).
3. Click the **Printer Setup** button.
4. Use the 1099 Forms Printer Setup wizard to select the desired options for the 1099 printer.
5. Click **Finish** to save the printer settings.

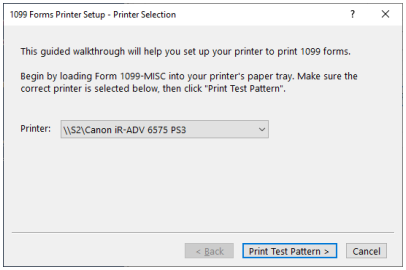


Figure 60, 1099 Printer Setup

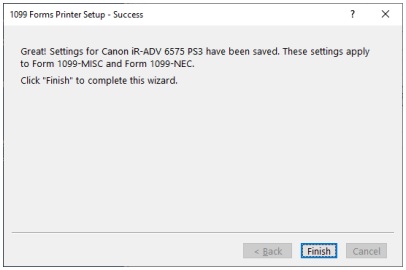


Figure 61, 1099 Printer Setup Success

Tabs3 Accounts Payable

Tabs3 Accounts Payable (AP) makes bill paying easier. Invoices and manual checks entered in AP can easily be charged to Tabs3 Billing clients and you can specify which General Ledger accounts to post to.

AP Customization

Default settings for AP are pre-configured; however, you can change these options at any time. The Customization window consists of three tabs. There are a few fields that must be set before proceeding. Complete details regarding the fields on each tab can be found in Help.

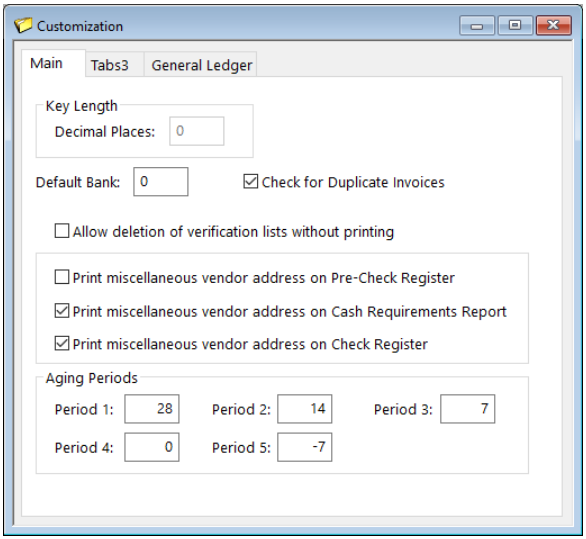


Figure 62, AP Customization window

▶ Configuring the AP Customization Window

1. In the AP Quick Launch, search for and select "Customization."

2. On the **Main** tab, Specify the desired number of **Decimal Places** you want used for the vendor numbering format. If you do not want to use Decimal Places in your Vendor ID, leave the value at 0.

   Note: Details regarding the **Decimal Places** can be found in the Help.

3. If you are integrating with Tabs3 Billing, click the **Tabs3** tab, verify that the **Integrate with Tabs3** option is selected, and specify any other desired options.
4. If you are integrating with General Ledger, click the **General Ledger** tab, verify that the **Integrate with GL** option is selected, and specify any other desired options.
5. Click to save the changes, then close Customization.

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

Accounts Payable Customization Settings

Bank Account Information

Before using AP, you need to set up your bank account. During the Guided Setup, you have the option of specifying bank information. You can add additional banks as necessary.

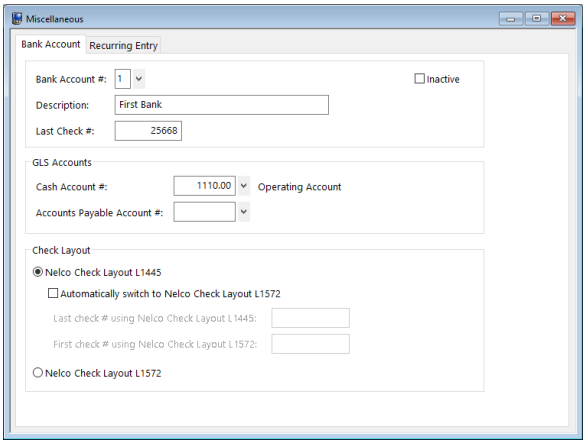


Figure 63, AP Bank Account

▶ To add a Bank Account

1. In the AP Quick Launch, search for and select "Bank Account Entry."
2. Press *Ctrl+N* to add a new bank account.
   a. Enter a **Description** for the bank account.
   b. Specify the **Last Check #** used for this bank account. AP will increment this field by 1 when you enter a manual check or when AP prints the next check.
   c. If integrating with GL, specify the **Cash Account #** for the bank account. Optionally specify the **Accounts Payable Account #**.
   d. Specify which Nelco check layout will be used.
3. Click to save the new bank account.
4. Add any other bank accounts as needed.

Once your bank accounts have been defined, you can add vendors and invoices.

More Info: Detailed information on the Vendor and Invoices windows can be found in the ***Accounts Payable Guide*** and in Help.

Checks and Forms

Tabs3 Accounts Payable checks and 1099s can be printed on forms from Nelco. Laser or continuous forms can be ordered from Nelco via their website at:

NelcoSolutions.com/Tabs3

More Info: Additional information and frequently asked questions regarding Nelco check forms can be found in Knowledge Base Article **R10978**, "Ordering Tabs3 Software Compatible Checks and Forms from Nelco" *(**support.Tabs3.com**)*.

Configuring Check Printers

Checks are configured at the printer level via the **Check Setup** button in the Print Setup window.

▶ To define the default AP check printer

1. In the AP Quick Launch, search for and select "Printer Setup."
2. The Printer Setup window will open.
    a. In the **Printer** field, select the desired default printer.
    b. Click **Check Setup**.
        1. Select the desired options for the check printer setup.
        2. Click **OK**.
3. Click **OK** to save the printer.

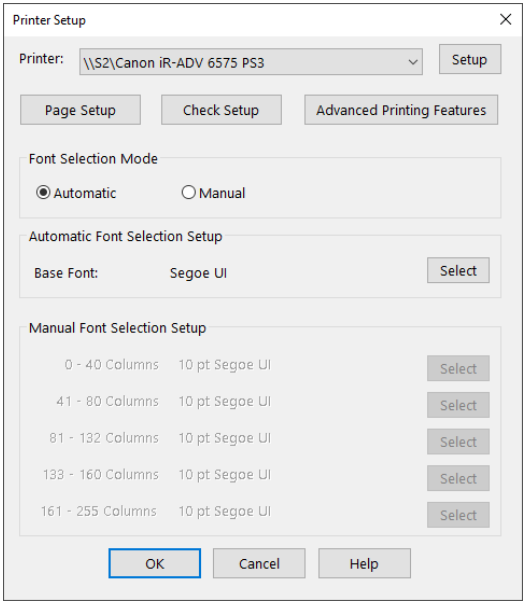


Figure 64, AP Printer Setup

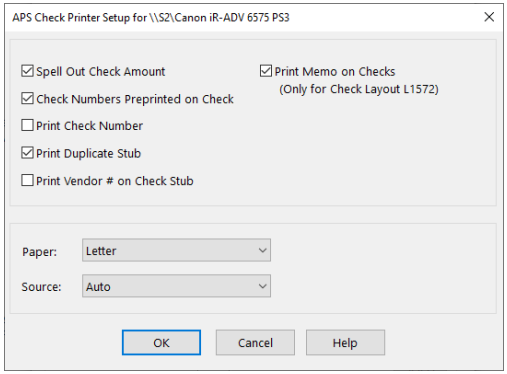


Figure 65, AP Check Printer Setup

More Info: Additional information regarding printers can be found in the **Setting Up Printers** section *(page 63)* of this guide. Detailed information regarding each option can be found in Help.

Configuring 1099 Printers

1099 forms are configured at the printer level via the **Printer Setup** button in the Print 1099 Forms window.

▶ To define the default 1099 printer

1. In the AP (or Trust) Quick Launch, search for and select "1099 Forms."
2. On the **Options** tab, select the desired Form (**1099-MISC** or **1099-NEC**).
3. Click the **Printer Setup** button.
4. Use the 1099 Forms Printer Setup wizard to select the desired options for the 1099 printer.
5. Click **Finish** to save the printer settings.

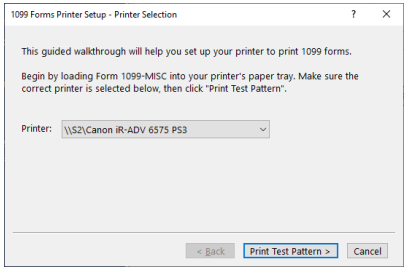


Figure 66, 1099 Printer Setup

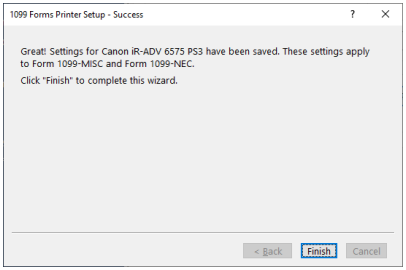


Figure 67, 1099 Printer Setup Success

Tabs3 General Ledger

Tabs3 General Ledger (GL) is a comprehensive general ledger system for any type of business and is based on a double-entry accounting system.

Cash Basis Accounting vs. Accrual Accounting

The majority of GL users are on a cash basis of accounting. However, many users are on a modified accrual basis of accounting or an accrual basis of accounting. Our accounting software can be successfully used by any firm—no matter which type of accounting method you use. Accrual posting features are available as described in the following.

Accrual Posting of Tabs3 Billing Accounts Receivable Figures **Accrual Posting of Tabs3 Billing Work-in-Process Figures** **Accrual Posting of Tabs3 Billing Client Funds Balances**
The Tabs3 Billing Software can be configured so that GL journal entries can be posted based on balances from Tabs3 Billing accounts receivable, work-in-process and client funds. Journal entries can be firm wide or by primary timekeeper and can be broken down by fees, expenses, advances, and finance charge. The software can be configured so GL financial statements can be run with or without accrual account balances.
Accrual Posting of Trust Bank Account Balances
Tabs3 Trust Accounting (Trust) can be configured so that GL journal entries can be posted based on Trust bank account balances. The software can be configured so GL financial statements can be run with or without the Trust bank account balances.
Accrual Posting of AP Accounts Payable Figures
The Accounts Payable (AP) includes a feature that allows you to post GL journal entries on a cash basis of accounting or an accrual basis of accounting. You have the option of posting GL journal entries from AP after checks have been printed and posted or before the checks have been printed. If you post GL journal entries on a cash basis of accounting, an optional feature is included that allows you to post unpaid invoices, run GL financial statements, and then unpost unpaid invoices. This feature gives you the advantage of being on a cash basis of accounting but still having the ability to print financial statements that include your accounts payable figures.

More Info: Details can be found in Help in the **Post Tabs3/Trust Accrual Balances** window.

General Ledger Clients

In GL, a client is a business entity for which books are kept. GL allows up to 999 sets of data to be configured, which enables the firm to keep separate books for multiple entities on the same computer. If you are keeping financial information for only one entity, then only one GL client needs to be set up.

Note: Integration with Tabs3 Billing, Tabs3 Accounts Payable (AP), and Tabs3 Trust Accounting (Trust) can only occur with GL Client 1.

Generally, GL Client 1 is configured by default; however, you can make changes to these settings at any time.

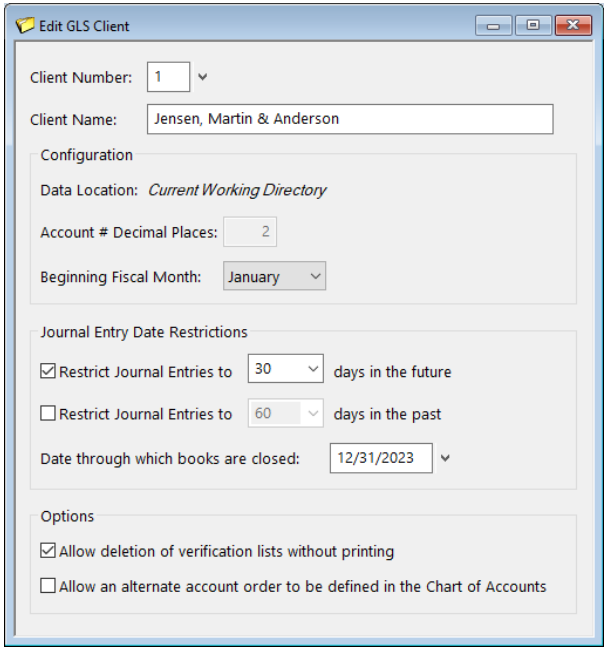


Figure 68, Edit GL Client window

▶ Changing GL Client 1

1. In the GL Quick Launch, search for select "Edit GLS Client."

2. Enter 1 in the **Client Number** field.
   a. Verify the firm's name in the **Client Name** field.
   b. The **Account # Decimal Places** used for your account numbers is shown here.
   c. Specify your **Beginning Fiscal Month**.
   d. Change any other options as desired.

3. Click to save the GL Client.

Note: If you chose to include starter data when installing the Tabs3 Software, GL Client #1 was automatically created, with a value of "2" for the **Account # Decimal Places** field. If you want to change this value, you must use the **Change Account # Format** utility. You can access this utility in the GL Quick Launch by searching for and selecting "Change Account # Format."

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

General Ledger Client Settings

Journal Names

Journal entries are recorded in a specific journal. You can use one or more journals to classify journal entries. At least one journal must be defined. Firms who use one journal typically define that journal name as the General journal and then use the Reference field in the journal entry for classifying their journal entries. Examples of journals include Cash Receipts, Cash Disbursements, Miscellaneous.

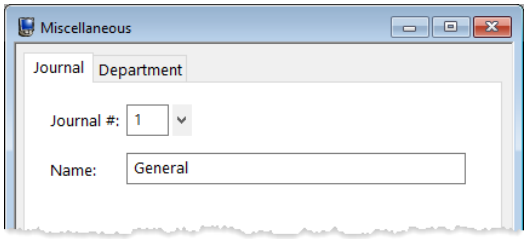


Figure 69, GL Journal Name

▶ To define a journal

1. In the GL Quick Launch, search for and select "Journal Name Information."
2. Enter the **Journal #**.
3. Enter the **Journal Name**.
4. Click to save the journal.

Departments

Departments are used to classify divisions within a business organization. You can use departments to refer to profit centers or locations. The use of departments is optional and allows financial statements to be printed for individual and combined divisions. One of the most common uses of departments in GL is to create separate departments for each partner in the firm so that financial statements can be printed for each individual partner.

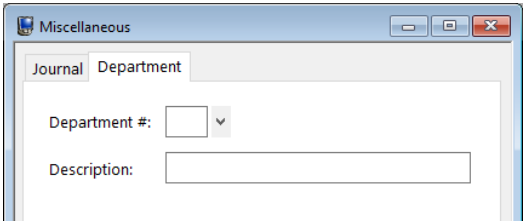


Figure 70, GL Department Name

▶ To define a department

1. In the GL Quick Launch, search for and select "Department Information."
2. Enter the **Department #**.
3. Enter the **Description**.
4. Click to save the department.

Chart of Accounts

The Chart of Accounts is the "heart" of the GL system. Because every firm's chart of accounts is unique, GL provides the ability to create your own customized chart of accounts. You can use the chart of accounts that comes with the software, modify it to fit your current account structure, or build your own chart of accounts from scratch. To save time, we recommend using the chart of accounts that comes with the software and modifying it as needed.

When the software was installed, an option to install starter data was provided. If the person who installed the software elected to include starter data, you can print out the chart of accounts and use the printed copy as a basis for determining which accounts can be deleted.

▶ To print a chart of accounts

1. In the GL Quick Launch, search for and select "Chart of Accounts List."
2. On the **Options** tab, under *Print Type*, select **Detail**. A detail list will include the accounts that journal entries can be posted to.
3. Click **OK**. Use the printed list to mark which accounts can be deleted.

▶ To delete an account

1. In the GL Quick Launch, search for and select "Chart of Accounts."
2. Highlight the account you want to delete.
3. Click .

A Little Background About Accounts

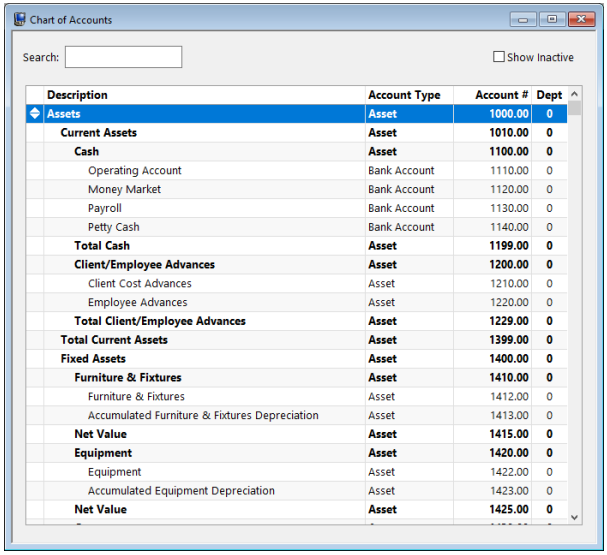
The **Print Type** and **Account Type** fields are the most important fields to understand.

Print Type	There are 4 different **Print Types**:	
	Detail	**Detail** accounts are the accounts that journal entries are posted to. Detail accounts are indented in the Chart of Accounts window.
	Heading	**Heading** accounts are used to determine the beginning of a group of detail accounts and can optionally print on the Balance Sheet or Income Statements. Heading accounts are automatically paired with a Total account and are shown as bold in the Chart of Account window.
	Total	**Total** accounts are used to determine the end of a group of detail accounts and can optionally print a total line on the Balance Sheet or Income Statement. Total accounts are automatically paired with a Heading account and are shown as bold in the Chart of Accounts window.
	Comment	Comment accounts are used to print additional information on the Balance Sheet or Income Statement.

Account Type	There are 7 different Account Types.

Asset	**Asset** accounts appear on the Balance Sheet and typically have debit balances.
Liability	**Liability** accounts appear on the Balance Sheet and typically have credit balances.
Income	**Income** accounts appear on the Income Statement and typically have credit balances.
Expense	**Expense** accounts appear on the Income Statement and typically have debit balances.
Bank Account	**Bank Accounts** are a type of asset account that can be reconciled.
Credit Card	**Credit Card** accounts are a type of liability account that can be reconciled.
Retained Earnings	There can be only one **Retained Earnings** account. The Retained Earnings account balance is calculated as Assets minus Liabilities, plus or minus any journal entries posted to the account.

Figure 71 shows the Chart of Accounts window. You can drag and drop accounts to their desired position.



Description	Account Type	Account #	Dept
Assets	**Asset**	**1000.00**	**0**
Current Assets	**Asset**	**1010.00**	**0**
Cash	**Asset**	**1100.00**	**0**
Operating Account	Bank Account	1110.00	0
Money Market	Bank Account	1120.00	0
Payroll	Bank Account	1130.00	0
Petty Cash	Bank Account	1140.00	0
Total Cash	**Asset**	**1199.00**	**0**
Client/Employee Advances	**Asset**	**1200.00**	**0**
Client Cost Advances	Asset	1210.00	0
Employee Advances	Asset	1220.00	0
Total Client/Employee Advances	**Asset**	**1229.00**	**0**
Total Current Assets	**Asset**	**1399.00**	**0**
Fixed Assets	**Asset**	**1400.00**	**0**
Furniture & Fixtures	**Asset**	**1410.00**	**0**
Furniture & Fixtures	Asset	1412.00	0
Accumulated Furniture & Fixtures Depreciation	Asset	1413.00	0
Net Value	**Asset**	**1415.00**	**0**
Equipment	**Asset**	**1420.00**	**0**
Equipment	Asset	1422.00	0
Accumulated Equipment Depreciation	Asset	1423.00	0
Net Value	**Asset**	**1425.00**	**0**

Figure 71, GL Chart of Accounts window

Double-clicking an account opens the Account Setup window. The Account Setup window has two tabs, the **Account** tab and the **Report Options** tab as shown in Figure 72 and Figure 73.

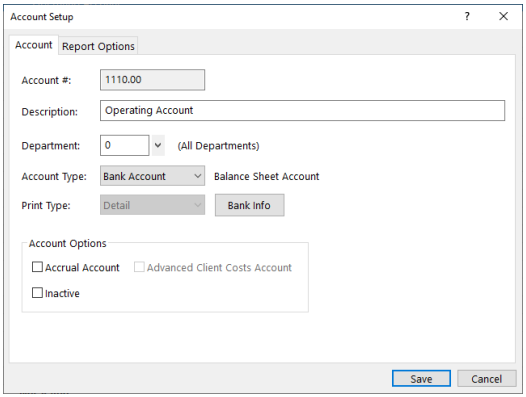


*Figure 72, **Account** tab of GL Account Setup*

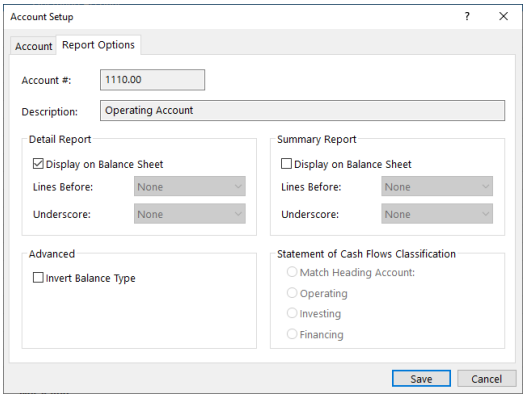


*Figure 73, **Report Options** tab of GL Account Setup*

▶ To add a new account

1. In the GL Quick Launch, search for and select "Chart of Accounts."
2. In the Chart of Accounts window, highlight the account above the account you want to add.
3. Click .
4. Specify the account number you want to use and click **OK**.
5. The Account Setup window will be displayed.
    a. Enter the account **Description**.
    b. Specify the **Account Type**.
    c. Specify the **Print Type**.
        i. If the **Print Type** is a **Bank Account** or **Credit Card**, click the **Bank Info** or **Card Info** button to enter bank or credit card information.
    d. Specify any other settings.
6. Click **Save**.

Posting Beginning Balances

Beginning balances are transferred to General Ledger by posting journal entries. Before you can post journal entries, your chart of accounts must be defined.

Determine Starting Date & Posting Date

Before posting beginning balances, you will need to determine your starting date, which is the first day of the month that you want to begin using GL. Then, when posting journal entries for beginning balances, you will use the day ***prior*** to the starting date.

Examples
• If your starting date is April 1, then you will use a March 31 posting date. • If your starting date is October 1, then you will use a September 30 posting date. • If your starting date is January 1, 2026, then you will use a December 31, 2025 posting date.

Post Journal Entries for Starting Balances

Once you have determined your starting date, you can post starting balances as follows.

- You will post a single transaction that includes a journal entry for ***each account***.
- All journal entries ***must*** use the same date. Use the day prior to your starting date for your posting date.
- Your accounts ***must*** be in balance before you can save the transaction.

Asset & Liability Accounts	Use the account's closing balance as of the posting date. • For example, if you want to begin using GL in May 2026, use April 30, 2026 for your posting date and the account's closing balance as of April 30, 2026. **Bank Account Note:** When posting starting balances for bank accounts, use the closing balance for the account from your previous bookkeeping system, rather than the balance provided by your banking institution. Using the account balance provided by your bank will result in an incorrect account balance if there are any outstanding transactions (e.g., uncleared checks or deposits). **Outstanding Checks and Deposits Note:** Before performing your first reconciliation, you must enter journal entries for any outstanding checks and deposits. You can do this now or later. Use the same account number for both the debit and credit entry. Step by step instructions for entering outstanding transactions and performing the initial reconciliation can be found in Knowledge Base article **R11661**, "GL Reconciliation Troubleshooting" *(**support.Tabs3.com**)*.
Income & Expense Accounts	Use the account's cumulative YTD balance as of the posting date. • For example, if you want to begin using GL in May 2026, use April 30, 2026 for your posting date and the account's cumulative YTD balance as of April 30, 2026.

Retained Earnings Account	Your retained earnings account may or may not require a journal entry. • If your retained earnings account started the year with a zero balance, your debits and credits will be in balance and no journal entry to the retained earnings account is required. • If your retained earnings account balance is carried over from the previous year, you will need to post a journal entry for the account balance as of the beginning of the year. Use the same posting date as the other journal entries. After making this journal entry, your debits and credits should be in balance.

More Info: Detailed information regarding the Journal Entries window can be found in the ***General Ledger Guide*** or in Help by pressing F1.

Once you have entered balances for all accounts in the transaction, save the transaction. You can verify your balances by printing a Balance Sheet and Income Statement using the month of your starting date for the Calendar Month to Print.

Platinum & Tabs3 Connect

If you are using Platinum software, you will need to configure HotBackup and Tabs3 Connect. The ***Platinum Setup Guide*** includes a great introduction to Platinum software and the various configuration screens used.

Configuring HotBackup

Once the Platinum software has been installed, you can enable HotBackup, set up the HotBackup schedule, and configure the email messages you want sent when a HotBackup successfully completes or does not complete. Detailed information on HotBackup can be found in the ***Platinum Setup Guide*** and the ***Platinum Server Guide***. Additionally, you can find detailed field level information in System Configuration Help for the various windows. Knowledge Base article **R11193**, "HotBackup Overview," also includes detailed information regarding HotBackup.

Configuring Tabs3 Connect

Once Tabs3 Connect has been configured, you can designate which users can use Tabs3 Connect. Detailed information on configuring Tabs3 Connect and enabling users can be found in the ***Platinum Setup Guide*** and System Configuration Help. Knowledge Base article **R11480**, "All About Tabs3 Connect," includes comprehensive information about Tabs3 Connect.

Configuring the Client Portal

In addition to Tabs3 Connect, you can also configure the Client Portal, which allows you to offer your clients the ability to view and pay their bills from any web browser. Detailed information on configuring the Client Portal can be found in the ***Platinum Setup Guide*** and System Configuration Help. Knowledge Base article **R11919**, "Configuring the Tabs3 Client Portal," includes comprehensive information about the Client Portal.

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting “Training Videos,” and at **Tabs3.com/video**.

Platinum Overview

Configuring Additional Features

Electronic Payment Processing

For electronic payment processing in Tabs3 Software, we recommend Tabs3Pay®. Tabs3Pay can be used with Tabs3 Billing and Tabs3 Trust Accounting (Trust) to process credit card and eCheck (ACH) transactions. Tabs3Pay includes the following features:

- Send payment and trust replenishment links with your statements so your clients can pay their bills electronically.
- Send emails with trust replenishment links directly from the Tabs3 Billing Matter Manager.
- Enter payments and client funds deposits directly in Tabs3 Billing and trust deposits directly in Trust.
- Import payments and trust deposits generated anywhere in the Tabs3Pay system (including recurring payments) via Tabs3 Billing.
- Enable surcharging to pass any associated credit card transaction fees to the cardholder.
- Sign up and enable Tabs3Pay directly from Tabs3 Billing or Trust.

More information regarding Tabs3Pay can be found in the ***Tabs3Pay Guide***.

Alternatively, Tabs3 Software can also integrate with both LawPay® (an Affinipay solution) and LexCharge® (formerly ProPay) to provide electronic processing of credit card and eCheck transactions in Tabs3 Billing and Trust. Both of these services also enable you to send payment links with your email statements, which your clients can use to pay their bills electronically.

More information regarding LawPay and LexCharge integration can be found in the ***LawPay Integration Guide*** and ***LexCharge Integration Guide***.

Document Management

PracticeMaster includes enhanced Document Management features that help your firm track all types of documents. You can create a convention for document names and locations, and then let PracticeMaster automatically name and file your documents. You can create your own document types for use in classifying, naming, and storing documents in a manner that meets your firm's needs. Check Out and Check In features let you check

out documents to prevent others from editing them while you are working on them. You can also create versions of documents, which enhances your ability to track changes during the editing and review process. Instantly save and update managed documents from Word, Adobe, Outlook, Excel, PowerPoint, WordPerfect, and Outlook email attachments. A powerful import feature lets you import entire groups of documents at one time directly from Windows Explorer and organize them in PracticeMaster.

More Info: Complete information regarding Document Management in PracticeMaster can be found in the ***Document Management Guide***. Appendix A of this guide includes a Getting Started Checklist.

Tabs3 Taskbill

Many larger corporations, particularly insurance companies, commonly require law firms to submit their invoices in an electronic format that conforms to a specific format as required by an electronic billing service. These formats have very specific and unique requirements regarding how the information must be submitted. Tabs3 Taskbill was designed to meet these specific requirements and currently supports over 100 different formats. Knowledge Base article **R10435**, "Tabs3 Taskbill Product Information," includes information regarding the formats that Taskbill supports.

Many company's formats require task based billing. Enabling task based billing for a client allows you to enter phase and activity/expense codes when inputting fees and costs. These codes are based on the Universal Task-Based Management system (or UTBMS).

More Info: Additional information regarding task based billing can be found in the ***Billing Methods Guide***.

More Info: Additional information regarding how to install and configure Tabs3 Taskbill can be found in the **Knowledge Base** and in the Help provided with Tabs3 Taskbill.

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

eBilling Using Tabs3 and Taskbill

Administrative Maintenance

The following section of this guide includes best practices regarding general usage.

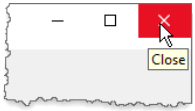
General Usage Tips

Use the following tips to keep the software running at its best.

Exit the Software Before Turning Off the Computer

It is important that all users exit the software properly before turning off the computer. You can use any of the following methods to exit the software.

- Select the ***File | Exit*** menu option
- Click the **Close** button on the title bar



Active User List

The Active User List can be accessed from the Quick Launch by searching for and selecting "Active User List," and shows which users are in the software. Managers can select the **All Systems** check box to optionally view all users in all of the software. Additionally, managers have the right to reset individual users.

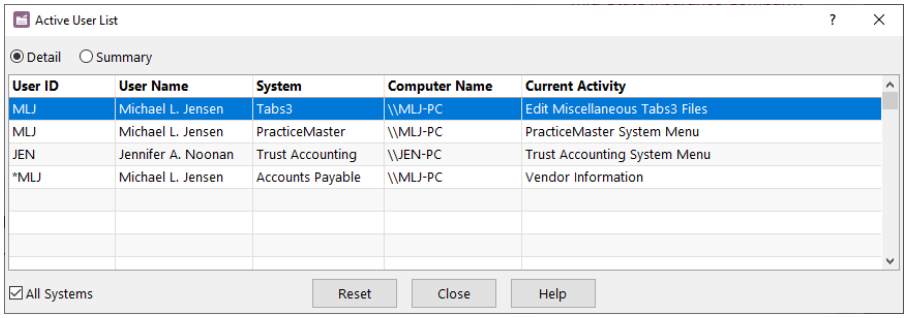


Figure 74, Active User List window

Resetting Users

When a user exits the software properly, the Active User List is updated. If a users does not exit the software properly, the user must be reset. For example, if a user's computer is accidentally unplugged while the software is open, that user must be reset. That same user can reset himself, or a manager can reset him. However, non-manager users cannot reset other users.

Although it is necessary in certain circumstances to have to reset users, it should be the exception as opposed to the rule. Users that are in the software should never be reset. Resetting users that are in the software can cause data loss, data corruption, and fatal errors. If it becomes necessary to reset a user, contact the user and ask them to log out. If the user is unavailable, go to the user's computer and close the application(s) yourself.

You can see which users have been reset by viewing the reset log file, which can be accessed in the Quick Launch by searching for and selecting "Reset Log."

More Info: Knowledge Base article **R10789**, "Resetting Users," includes detailed information regarding resetting users and how to reduce the frequency of resets.

Startup Options

The Tabs3 Software includes various startup options that can be used when starting the software. We recommend familiarizing yourself with the various options available.

One startup option that most firms like to implement is the ability to bypass the User ID in the Logon window. You can modify the desktop shortcuts to include the User ID so that the user does not have to type in their User ID every time they start the software.

More Info: The Help for each Tabs3 Software application includes detailed information regarding startup options.

Month-End/Year-End Procedures

There are several tasks that must be performed at month-end and year-end for the Tabs3 Billing, Trust Accounting, Accounts Payable, and General Ledger applications. Checklists with these monthly tasks can be found in each application's built-in Help files under the "Month-End Procedures" index entry. Procedures for year-end tasks can be found in the following Knowledge Base articles.

R10429	Year-End Overviews for Tabs3 Software Products
R11693	Tabs3 Billing Year-End Overview
R11600	Tabs3 General Ledger Year-End Overview
R11278	Tabs3 Accounts Payable Year-End Overview
R10433	Tabs3 Trust Accounting Year-End Overview

Backup Best Practices

Tabs3 Software includes a built-in backup feature. In addition to using the built-in backup, it is important that you implement another backup method. A thorough discussion of the backup options can be found in Knowledge Base article **R11213**, "Backup Strategy."

Integrity Check Utilities

Tabs3 Software includes built-in utilities that check the integrity of the data. We recommend that these utilities be run on a monthly basis and also prior to all backups. In addition, these utilities should be run if a hardware failure occurs while using the software (i.e., power failure, power surge, etc.).

Application	Quick Launch
Tabs3 Billing	*Data File Integrity Check*
	Archive Integrity Check
PracticeMaster	*Data File Integrity Check*
Trust Accounting	*Data File Integrity Check*
Accounts Payable	*Data File Integrity Check*
General Ledger	*Data File Integrity Check*

After the Data File Integrity Check completes, verify that there are zero errors. If errors are encountered, review the Error Report and resolve the errors before continuing to use the software.

More Info: Knowledge Base article **R11819**, "Data File Integrity Check Errors," includes detailed information on how to resolve any data file integrity check errors that may occur. Likewise, Knowledge Base article **R10771**, "Archive File Integrity Check Errors," includes detailed information on how to resolve any archive file integrity check errors that may occur.

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

Data File Integrity Check

Tracking Tools

Tabs3 Software includes various tools to help you track software activity.

Verification Lists

Verification lists are lists of activity that has occurred.

Each user can run a list of all transactions that have been entered. For example, the Tabs3 Billing Fee Verification file includes a list of all fee transactions that have been added, changed, and deleted. Users can review their own verification lists or they can submit them to an administrator for review purposes.

More Info: Examples of the various verification lists are available in the Sample Reports. In the Quick Launch, search for and select "Documentation," for a list of all available resources.

More Info: Knowledge Base article **R10793**, "All About Verification Lists," includes detailed information regarding the various verification lists in Tabs3 Software.

Log Files

Log files track multiple activities in the Tabs3 Software. Multiple log files are available for each application. They can be very useful in tracking down the cause of errors and determining when changes were made.

The following log files are maintained in the software for troubleshooting purposes and can be accessed by searching for and selecting their name in the Quick Launch.

Error Log *(All Applications)*	The Error Log tracks any fatal errors that occur in the software.
Reset Log *(All Applications)*	The Reset Log tracks information regarding when users are reset using the Active User List utility.
Support Log *(All Applications)*	The Support Log tracks various activities performed in the software.
Outlook Sync Billing Changes Log *(Tabs3 Billing)*	The Outlook Sync Billing Changes Log tracks changes to Bill To contacts made by the Outlook Synchronization process in PracticeMaster.
Outlook Sync Log *(PracticeMaster)*	The Outlook Sync Log tracks information on the changes made during the Outlook Synchronization process.
Outlook Search Log *(PracticeMaster)*	The Outlook Search Log stores any errors that occur while PracticeMaster updates email records in Outlook.
Tabs3 Connect Log *(System Configuration)*	The Tabs3 Connect Log is a detailed log file used for reviewing chronological Tabs3 Connect activity and troubleshooting connection issues.
Tabs3 Connect Access Log *(System Configuration)*	The Tabs3 Connect Access Log tracks user access to Tabs3 Connect and records occurrences of log ins, log outs, lock outs, and downloads of documents and email attachments.

Submit Log Files

Menu: ***Help | Internet Resources | Submit Log Files***
Quick Launch: ***Submit Log Files***

The Submit Log Files utility *(Figure 75)* is used to provide log file information to Tabs3 Support for troubleshooting purposes via the Internet. Before the requested log files can

be submitted, you will be required to enter an **Incident ID**, which will be provided by the Tabs3 Support Representative with whom you are speaking.

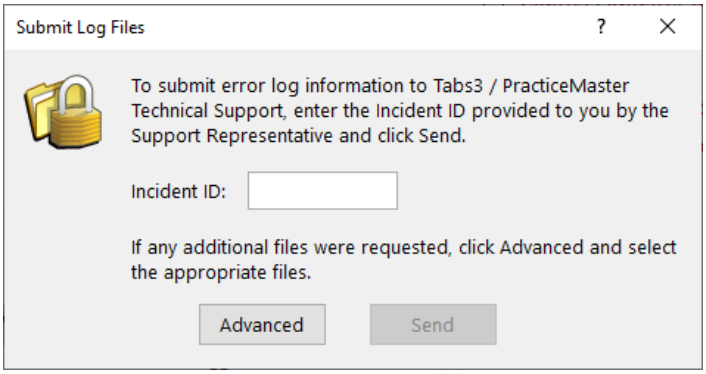


Figure 75, Submit Log Files window

Incident ID

The **Incident ID** will be provided by the Support Representative that you are speaking with on the phone. The **Incident ID** will be a 4-character code. Until this field is filled in, the **Send** button will remain unavailable.

The **Advanced** button opens the Advanced File Selection window, which allows you to select additional log files to be submitted to Tabs3 Support.

The **Send** button will submit all files that were selected in the Advanced File Selection window, but only becomes available after the Incident ID has been entered.

History Tracking

History Tracking is an optional feature in PracticeMaster that can be used to track all additions and changes to specific fields in a file. History Tracking does not track deletions.

By default, History Tracking is not enabled. When History Tracking is enabled, additional activity is performed by PracticeMaster. PracticeMaster performs additional writing to the hard drive every time a record is added or changed for any file that has a field configured to track history. Therefore, we recommend enabling History Tracking for only those fields that require it.

How to Configure History Tracking

History tracking is configured at two levels—the system level and for each individual field.

▶ To configure History Tracking at the System Level

1. In the PracticeMaster Quick Launch, search for and select "Customization."
2. Select the **Use History Tracking** check box.
3. If you want to limit the size of the History Tracking file, select **Limit history file size** and specify the maximum size (in megabytes) that you want to allow the History Tracking file to reach.
4. Click **OK** to save the Customization settings.

▶ To configure History Tracking for an Individual Field

1. In the PracticeMaster Quick Launch, search for and select "File Maintenance."
2. Click the + next to **System Files** or **Areas of Practice** to display the corresponding list(s) of files.
3. Once you have selected the desired file, right-click the file and choose **Edit Field Definitions**.
   ...or...
   Alternatively, double-click the file and select the **Field** tab.
4. The File Definition window will be displayed. Highlight the field you want to change in the **Field IDs** list.
5. Select the **Track History** check box.
6. Click **Done** to save the change.

Note: The About PracticeMaster window indicates whether History Tracking is enabled, the user defined maximum History File size, and the combined size of the current History Files. In the Quick Launch, search for and select "About PracticeMaster," to access this window.

Viewing the History File

Viewing the History File is accomplished via the Editor window.

▶ To view the History File

1. Use the Quick Launch to open the file whose history you want to view.
2. From the **List** tab, highlight the desired record.

3. Right-click the highlighted record, point to **Action** and then select **Display History**.
4. If changes have been made, the View Record History window will be displayed allowing you to browse through the changes. Otherwise, a message will displayed indicating history tracking cannot be displayed.

When the History File Gets Too Large

The history for all configured fields is maintained in a single set of files named CMAUDIT.DAT and CMAUDIT.IDX. Depending on which fields are using History Tracking, these files have the potential of becoming extremely large. Because of this, you have the ability to specify a maximum History File Size. Once the files have reached their size limit, any data written to the History Tracking File will begin replacing the oldest data to make room for the new data.

When the size of the CMAUDIT.DAT file is within 10% of the specified maximum size, a message will be displayed when PracticeMaster is started. This message indicates that the maximum history tracking file size will soon be reached. You can either increase the maximum file size or leave it at its current size. If you leave the file at its current size, the message will be displayed again the next time PracticeMaster is started. If you select the **Do not show again** check box, the message will not be displayed again for you *(unless the user profile is reset or you run the **Reset Optional Messages** utility)*.

Miscellaneous Notes

History tracking is available for all files whose file structure can be modified. However, history tracking is not available for the following files:

- Timekeeper File
- Category File
- Tcode File
- Task Code File
- User File
- Text Macro File
- Location File
- eNote File
- Secure Client File

Resources

There are many resources available to help you learn and use the software.

Guides & Quick Guides

There are multiple guides installed with the software. In the Quick Launch, search for and select "Documentation" for a list of all available resources. The guides can also be accessed via our Web site at:

Tabs3.com/support/docs.html

Report Packs

Report packs are available for all software. These report packs includes examples of each report in the software and include detailed information regarding each item on the report. In the Quick Launch, search for and select "Documentation" for a list of all available resources.. The sample reports can also be accessed via our Web site at:

Tabs3.com/support/docs.html

Training Videos

Training videos are multimedia resources that walk you through Tabs3 Billing and PracticeMaster features. In the Quick Launch, search for and select "Training Videos" to access the training video libraries. The training videos can also be accessed at:

Tabs3.com/videos

Knowledge Base

The Knowledge Base includes information regarding Tabs3 Software applications and is provided for end-users, consultants, and other third parties who work with Tabs3 Software.

It contains extensive information on Error Troubleshooting, Networking & Windows Issues, “How To” articles and application-related articles. You can access the Knowledge Base in the Quick Launch by searching for and selecting “Knowledge Base,” or from your web browser at **support.tabs3.com**.

Help

Help is installed with the software and is easily accessed by pressing F1, by clicking the button, or in the Quick Launch by searching for and selecting “Help Topics.” Help includes detailed information regarding specific applications and features. Clicking the button opens the relevant Help topic for the window you are currently using. Many times, reading the appropriate Help topic may be the fastest way to find your answer.

Tabs3 Support

Tabs3 Software provides some of the best support in the industry. Service to our customers is extremely important to us—so much so that our motto is:

Reliable software. Trusted service.

Support is provided at no charge with an active subscription and is available from 8:00 a.m. to 5:00 p.m. Central Time, Monday through Friday. If you have any questions, please feel free to call our Support staff at (402) 419-2210.

Email support is also available for all firms with an active subscription. Our support team responds to emails during office hours. Our goal is to respond to your question within one business day. Please keep in mind that time-sensitive and complex issues are better handled over the phone. To request email support, visit **Tabs3.com/support**.

Tabs3 Consultants

Tabs3 Software products are available through a national network of over 250 consultants. Those consultants are small independent firms that specialize in the sales, installation, training and support of billing, financial, and practice management software for law firms. By having consultants service all 50 states, you can work directly with a local person familiar with Tabs3 Software, who can provide personalized on-site installation, training,

and support services. Visit our website for a consultant near you or contact our Sales staff at (402) 419-2200.

Tabs3.com/find-a-consultant

Thank you for choosing Tabs3 Software. We look forward to serving your practice management and billing needs with reliable software and trusted service for many years to come. Let us know how we can help you get started with Tabs3 Software.

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