Billing Adjustments Guide

Tabs3 Software Billing Adjustments Guide

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Purpose of this Guide

This **Billing Adjustments** Guide covers adjusting transactions in the Tabs3 Billing software. It includes information on making adjustments to work-in-process (unbilled) and archive (billed) transactions.

Adjustments are a fact of life when it comes to billing. They can be the result of a misunderstanding, a data entry error, a bounced check, a normal transaction, or even part of a standard billing process. Tabs3 Billing has built-in features to help you make any necessary adjustments and ensure that an audit trail exists when required.

Information on billing methods used in Tabs3 Billing can be found in the **Tabs3 Billing Methods Guide**.

All guides are available on our website at:

Tabs3.com/support/docs.html

Knowledge Base

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

support.Tabs3.com

Additional Resources

A list of additional resources for billing adjustment features can be found on page 36.

Work-In-Process vs. Archive Transactions

When making an adjustment, the first thing to consider is whether the transaction or transactions that will be affected by the adjustment are work-in-process or archived transactions.

Work-In-Process Transactions   From the time a transaction is first entered into Tabs3 Billing until the point it is included on an updated statement, it is considered a work-in-process transaction. Work-in-process transactions, also referred to as WIP, can be manually changed and deleted (assuming you have the appropriate access rights associated with your user profile).

Archived Transactions   Once a transaction has been included on an updated statement, it is moved to the archive file. Archived transactions cannot be directly edited or deleted by the user. Tabs3 Billing offers multiple methods of adjusting archived transactions that provide an audit trail of any changes made.

Types of Adjustments

This guide includes information on multiple adjustment types. The following table provides a list of adjustment types and which transactions they affect.

Adjustment Type	Page	WIP	Archive
Payment Adjustments	page 6		✔
Credits	page 10		✔
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Write-Up / Write-Down Fees and Costs	page 20	✔	
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Payment Adjustment

Menu:	*Maintenance	Transaction Related	Payment Adjustment*
Home:	*All Actions	Transactions	Payment Adjustment*
Quick Launch:	*Payment Adjustment*

The Payment Adjustment utility allows you to back out all or part of a processed payment from the client ledger/accounts receivable information and the receipt allocation information automatically. This utility is used to reverse payments that have already been updated. If the payment is still in WIP, you can use the Payment Entry window to edit or delete the payment. If the payment has been included on a statement but has not been updated, then you must either unbill the statement or update the statement before you can adjust the payment.

> **More Info:** Information regarding the Unbill Final Statements and Update Statements utilities can be found in the *Statements Guide*.

▶ Using the Payment Adjustment Utility

1. In the Quick Launch, search for and select "Payment Adjustment.".

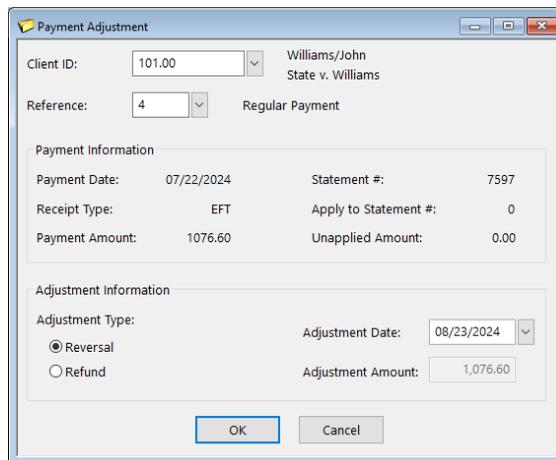2. When prompted, perform the backup if needed.

Figure 1, Payment Adjustment Window

3. In the **Client ID** and **Reference** fields, select the client and payment you want to adjust.

4. Specify the **Adjustment Type**.

   a. If you are reversing the entire payment, select **Reversal**.

   b. If you are refunding all or a portion of the unapplied portion of the payment, select **Refund**.

5. Specify the **Adjustment Date**. This is the date the adjustment will be applied to the client's ledger.

6. Click **OK** to continue the adjustment.

7. You will be prompted to confirm the adjustment. Click **Yes** to continue.

▶ **Using the Payment Adjustment Options window**

1. Once you confirm the payment adjustment, the Payment Adjustment Options window will be displayed (Figure 2).
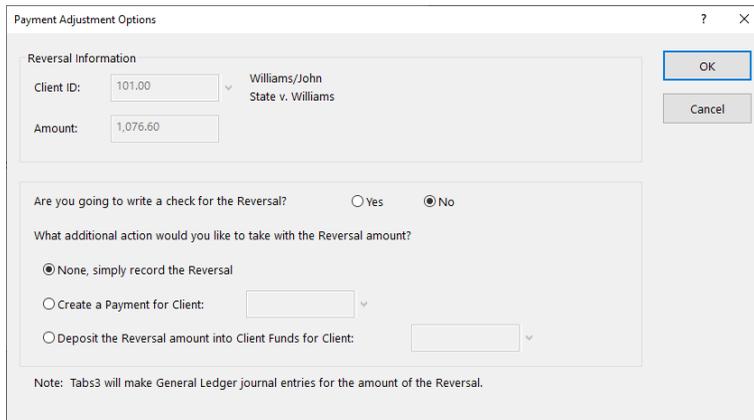

Figure 2, Payment Adjustment Options Window

2. Your choice for the **Are you going to write a check for the Reversal/Refund?** field will depend on the type of adjustment you are making.

   • If you are issuing the reversal or refund using a method that will generate GL journal entries (e.g., posting a check in AP), select **Yes** in the **Are you going to write a check for the Refund?** field and click **OK** and proceed to step 4.

   • Otherwise, select **No**.

3. Your choice for the **What additional action would you like to take with the Reversal/Refund amount?** field will depend on the type of adjustment you are making.

- If you want to apply the amount of the adjustment as a payment for a client, select **Create a Payment for Client** and select the client you want to assign the payment to in the field on the right.

- If you want to deposit the amount of the adjustment to a client's Client Funds, select **Depost the Reversal/Refund into Client Funds for Client** and select the client you want to assign the deposit to in the field to the right.

- Otherwise, select **None, simply record the Refund**.

4. Click **OK**.

5. If necessary, you will be prompted to specify the date to use for the reversing journal entries for the refund in GL.
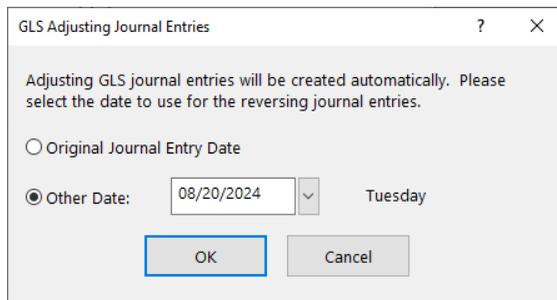

Figure 3, GLS Adjusting Journal Entries window

6. Specify the date you want the journal entries to use and click **OK**.

7. You will be prompted to enter a description-only transaction. This transaction is linked to the payment adjustment and is used for audit trail purposes.
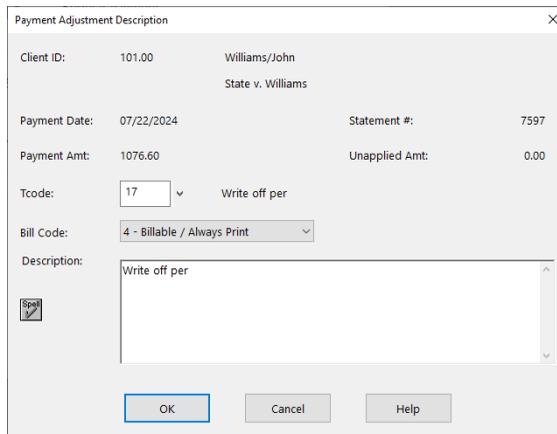

Figure 4, Payment Adjustment Description window

8. Enter an appropriate description in the **Description** field and click **OK**.

9. If you chose to apply the reversal/refund as a payment to a client or deposit it to client funds, a payment or client funds entry window for the specified client will be displayed. Enter the appropriate information and save the record.

Note: If the payment has a linked electronic payment transaction, you will be asked if you want to create a void/credit transaction for the payment processor (i.e., Tabs3Pay, LawPay, or LexCharge). Complete details regarding credit card authorization can be found in Tabs3 Billing Help.

Caution: Make a backup before running this utility. If this utility is interrupted for any reason, you must restore from the backup. You will be given the opportunity to make a backup immediately after selecting this utility.

Note: Adjusting GL journal entries for the net difference are optionally created when payments are reversed or refunded.

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**.

> ▶ **Working with Payments**

> ▶ **Working with Payment Adjustments**

Credits

Credit transactions are used to adjust billed amounts and must be applied separately to fees, expenses, advances and finance charges. Credit transactions are entered using the Fee and Cost entry windows using a *negative* value in the **Amount** field.

> **Tip:** The **Amount** field is only available in Detail view. Click the 🖳 (**Detail/Rapid**) button to toggle between Detail and Rapid views.

If you need to credit a payment, use the **Payment Adjustment** *(page 6)* utility.

In order to process a credit transaction, you must run a final statement with the credit transaction on the statement, and then run the Update Statements utility.

```
                        Fees
                        ----

08/05/2026 Research                               1,000.00

                                                  --------
          For Current Services Rendered           1,000.00

08/05/2026 Credit for free first hour.             -200.00
                                                   -------
          Total Credits for Fees                   -200.00

          Total Current Work                        800.00
```

Figure 5, Fee Credits on a Statement

> **Note:** Credit transactions apply at the time they are processed. Credits will first apply to any applicable work-in-process included on the statement being processed. Then, if there is still a credit amount to apply, it will automatically apply toward any outstanding amount due for that timekeeper or cost type. Once there is no outstanding amount due, credit transactions will apply toward previous balances, beginning with the most current statement due and working backwards chronologically.

> **Note:** Credit transactions are applied before unapplied payments are applied.

Fee Credits

Menu:	*File	Data Entry	Fee*
Home:	*All Actions	Transactions	Fee Entry*
Quick Launch:	*Fee Entry*

To make a fee credit entry, use the Fee Entry window. You may want to set up separate transaction codes specifically for fee credits for each timekeeper. A fee credit is used to deduct hours and/or an amount from the billed fees for a client. It will also deduct the hours and amount from the receipt allocation balances and the timekeeper, category, and client productivity totals. The **Hours** and **Amount** fields are entered preceded by a minus sign, thus causing a subtraction when processed.

Expense or Advance Credits

Menu:	*File	Data Entry	Cost*
Home:	*All Actions	Transactions	Cost Entry*
Quick Launch:	*Cost Entry*

To make an expense or advance credit entry, use the Cost Entry window. You may want to set up separate transaction codes specifically for expense credits for each cost type and separate transaction codes specifically for advance credits for each cost type. An expense credit is used to deduct an amount from the billed expenses for a client whereas an advance credit is used to deduct an amount from the billed advances for the client. Processed expense and advance credits will also deduct from receipt allocation balances and client productivity totals. The **Amount** field is entered preceded by a minus sign, thus causing a subtraction when processed.

Finance Charge Credits

There are several methods for reversing finance charges. The methods available depend on whether the statement has been updated or not.

Reversing a finance charge on an updated statement

If the finance charge has been updated, it is part of accounts receivable. Use one of the following methods to reverse the finance charge.

▶ Method 1

1. Undo the updated statement.

2. Make the appropriate adjustment to change how finance charge is accrued. For example, you may need to change the finance charge settings for the client, or you may need to use a different statement date.

3. Rerun the final statement and update it.

▶ Method 2

- Use the **Write Off Client** *(page 13)* utility to write off the finance charge.

- You can write off the entire finance charge amount or portions of the finance charge on each statement.

- Finance charge write offs are tracked as a separate line item on reports.

Reversing a finance charge on a statement that hasn't been updated

If the finance charge has appeared on a final statement that has not yet been updated, use one of the following methods to reverse the finance charge.

▶ Method 1

- Make the appropriate adjustments to change how finance charge is accrued and rerun the final statement.

▶ Method 2

- Use the Unbill Final Statements utility to unbill the final statement.

Note: Additional information about credit transactions can be found in KB Article **R11760**, "Best Practices When Applying Credits."

Write Offs

Menu:	*Maintenance	Client Related	Write Off Client*
Home:	*All Actions	People	Write Off Client*
Quick Launch:	*Write Off Client*

Menu:	*Maintenance	Client Related	Reverse Write Off*
Home:	*All Actions	People	Reverse Write Off*
Quick Launch:	*Reverse Write Off*

The Write Off Client utility is used to write off all or a portion of a client's accounts receivable balance. If you select to write off an individual statement, you have the option of writing off the entire statement or selecting which portion of the statement you want to write off. You also have the option of writing off the balance for all timekeepers or a specific timekeeper for all statements or an individual statement. When writing off a client, Tabs3 Billing allows you to add a "description only" transaction (type 4) that can optionally print on the next statement. This description only transaction is used to explain the presence of the write off on the client's ledger.

By using the Write Off Client utility to adjust a client's balance, client ledger statement records with write off amounts are automatically created. This makes it easy to track the billing history for the client. All billed productivity reports will reflect the write off as well. The Write Off Client utility is also used to write off finance charges.

Write Offs can be reversed using the Reverse Write Off utility.

> **Note:** Do not confuse this utility with the **Write-Up/Write-Down Fees & Costs** utility *(page 20)* which is used to adjust work-in-process amounts *before* billing.

▶ **To write off all of a client's balance.**

1. In the Quick Launch, search for and select "Write Off."

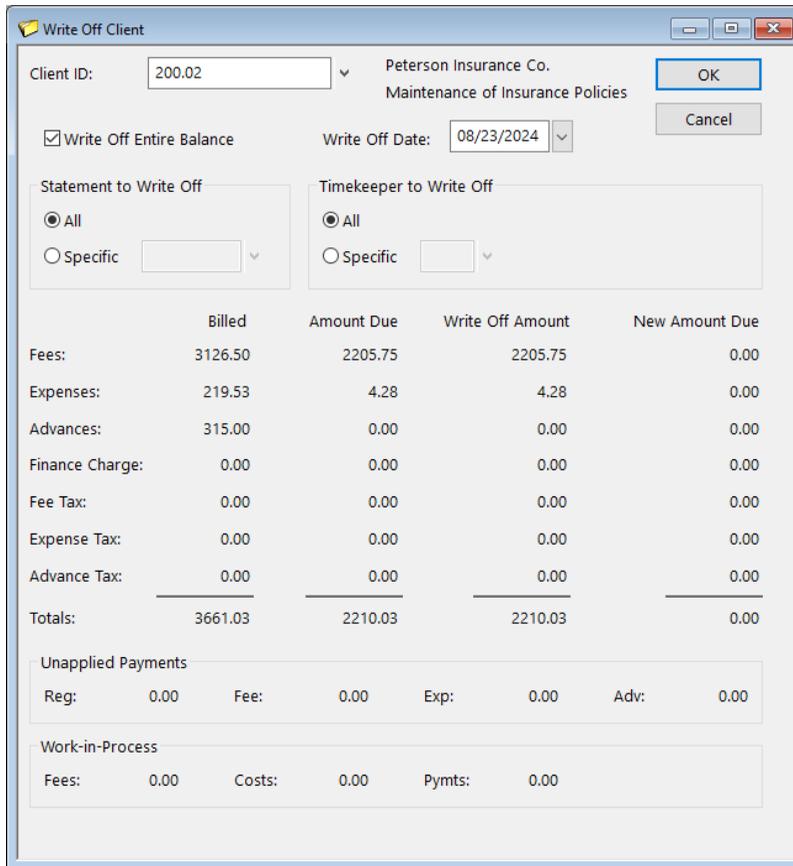*Figure 6, Write Off Client window*

2. In the **Client ID** field, select the client whose balance you want to write off.

3. Select the **Write Off Entire Balance** check box.

4. Verify that the values for **Fees**, **Costs**, and **Pymts** in the **Work-in-Process** section are all $0.00. *(Note: You cannot write off the entire balance of a client with work-in-process transactions.)*

5. Click **OK** to write off the balance. You will be prompted to confirm that you want to write off the balace, click **Yes** to continue or **No** to return to the Write Off Client window.

6. A Client Write Off Description window will be displayed. This window creates a description only transaction, allowing you to enter an explanation for the write off. Enter the appropriate information in the **Description** field and click **OK**.

Figure 7, Client Write Off Description window

7. Since you have written off the client's entire balance, you will be given multiple options for dealing with the client record *(Figure 8)*.

   a. Select **Leave client active** if you do not want to change the client to inactive or delete the client.

   b. Select **Change client's billing status to Inactive** if you want to change the client to inactive. If you select this option, the **Close Date** field will become available. The date entered in this field will be written to the **Date Closed** field on the **Address** tab in the Client file.

   c. Select **Delete client** if you want to delete the client.

   > **Note:** Deleted clients are not available for conflict of interest checking. If you delete the client, you will not be able to print a Receipt Allocation Report, Client Productivity Report, Client Ledger Report, Cash Receipts Report, or Write-Up/Write-Down Report for the client. If you want to maintain report totals or history for a client, change the client's status to **Inactive** instead of deleting the client.
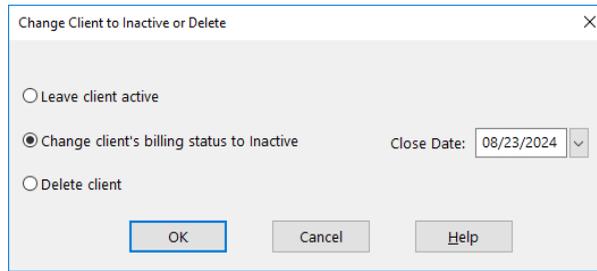
Figure 8, Change Client to Inactive or Delete window

8. Select the appropriate option and click **OK** to complete the write off process.

▶ **To write off part of a client's balance.**

1. In the Quick Launch, search for and select "Write Off."

Figure 9, Write Off Client window

2. In the **Client ID** field, select the client whose balance you want to write off.

3. If you want to write off a specific statement, select **Specific** in the **Statement to Write Off** section and select the statement you want to write off.

Figure 10, Statement to Write Off

4. If you want to write off all transactions for a specific timekeeper, select **Specific** in the **Timekeeper to Write Off** section and select the timekeeper you want to write off.

Figure 11, Timekeeper to Write Off

5. If you want to write off a specific timekeeper's portion of a statement, select **Specific** in both the **Statement to Write Off** and **Timekeeper to Write Off** fields and select the statement and timekeeper you want to write off.

6. Verify that the amounts you are writing off are correct.

	Billed	Amount Due	Write Off Amount	New Amount Due
Fees:	1175.00	1175.00	1175.00	0.00
Expenses:	0.00	0.00	0.00	0.00
Advances:	0.00	0.00	0.00	0.00
Finance Charge:	0.00	0.00	0.00	0.00
Fee Tax:	0.00	0.00	0.00	0.00
Expense Tax:	0.00	0.00	0.00	0.00
Advance Tax:	0.00	0.00	0.00	0.00
Totals:	1175.00	1175.00	1175.00	0.00

Figure 12, Write Off Amounts

7. Click **OK** to write off the balance. You will be prompted to confirm that you want to write off the balance, click **Yes** to continue or **No** to return to the Write Off Client window.

8. A Client Write Off Description window will be displayed. This window creates a description only transaction, allowing you to enter an explanation for the write off. Enter the appropriate information in the **Description** field and click **OK** to complete the write off process.

Figure 13, Client Write Off Description

▶ **To reverse a write off**

1. In the Quick Launch, search for and select "Write Off."

Figure 14, Reverse Write Off Window

2. In the **Client ID** field, select the client whose write off you want to reverse.

3. In the **Reference Number** field, select the write off you want to reverse.

4. Verify that the **Write Off Date** and amounts shown match the write off you want to reverse.

5. Click **OK** to reverse the write off.

Caution: Make a backup before running these utilities. If these utilities are interrupted for any reason, you must restore from the backup. You will be given the opportunity to make a backup immediately after selecting these utilities.

GL Integration Note: Adjusting journal entries are not made to GL when these utilities are run. You may need to make manual journal entries in GL that reflect the write off or reversal.

Write-Up / Write-Down Fees and Costs

Menu:	*Statements	Statement Preparation	Write-Up/Write-Down Fees & Costs*
Home:	*All Actions	Statement Preparation	Write-Up/Write-Down Fees and Costs*
Quick Launch:	*Write-Up/Write-Down Fees and Costs*

The Write-Up/Write-Down Fees and Costs utility allows you to write-up or write-down total unbilled fees, costs, or hours for a client for a range of timekeepers, transaction codes, categories, or dates for a client prior to billing. Write-ups and write-downs can be adjusted to a specified amount or by a specified percentage. When you choose to write-up or write-down fees, you will be allowed to write-up or write-down the number of hours to bill as well. You can write-up or write-down a single matter, or optionally write-up or write-down all matters for a client at the same time.

> **Note:** Do not confuse this utility with the Write Off Client utility *(page 13)* which is used to write off billed amounts after transactions have been billed.

This utility is used to adjust billable amounts for a client's transactions to a specified amount while maintaining the integrity of the effective billing rate and productivity figures. This function is commonly used for contingency billing and some types of value billing.

After performing the write-up/write-down, you can print a verification list when exiting the utility that shows the old total, new total, and the net write-up/write-down. Additionally, a Write-Up/Write-Down Report is also available.

▶ Using the Write-Up/Write-Down Fees and Costs utility

1. In the Quick Launch, search for and select "Write-Up/Write-Down Fees & Costs."

Figure 15, Write-Up/Write-Down Fees and Costs window

2. Select the matter you want to write up or write down in the **Client ID** field. To write up or down amounts for all matters for the specified client, select the **Include All Matters for this Client** option.

3. In the **Transaction Type** section, specify whether you want to adjust **Fees**, **Expenses Only**, **Advances Only**, or **Both Expenses and Advances**.

Figure 16, Transaction Type section

4. In the **Transaction Selection** section, select the range of transactions you want to adjust.

Figure 17, Transaction Selection section

5. Click the **Calculate Client Total** button to show the amount eligible for the write-up/write-down.

6. In the **Amount Adjustment Type** section, specify whether you want to adjust the transactions by a specific amount or by a percentage.

7. Enter the **New Total** or **Percentage** you want to use.

Figure 18, Amount Adjustment Type section

8. In the **Hour Adjustment Type** section (Fee adjustments only), specify whether you want to adjust the transactions by a specific amount or by a percentage.

9. Enter the **New Total** or **Percentage** you want to use.

Figure 19, Hours Adjustment Type section

10. Verify that the **New Total Billable Amount** and **New Total Billable Hours** fields are correct.

11. Click **OK** to apply the adjustment. Click **Yes** to confirm you want to perform the write-up or write-down.

> **Note:** Adjusting GL journal entries are created when costs are written up or down.

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**.

Write-Up/Down Fees & Costs

Transfer A/R and Transactions

Menu:	*Maintenance	Transfer A/R and Transactions*
Home:	*All Actions	Transactions	Transfer Transactions*
Quick Launch:	*Transfer Transactions*

The Transfer A/R and Transactions utility is used to transfer unbilled fee, cost, or payment transactions from one client to another. It can also be used to transfer the accounts receivable balance and client funds information from one client to another.

> **More Info:** More information on using the Transfer A/R and Transactions utility can be found in the Tabs3 Billing Help.

The most common use of the Transfer A/R and Transactions utility is to correct transactions that were entered for an incorrect client or matter. Once a transaction has been saved, you cannot edit the Client field. However, you can use this utility to transfer the transaction to the correct client. You can transfer work-in-process fee, cost, and payment transactions from one matter to another based on the following ranges:

- Transaction Code
- Timekeeper
- Category
- Date
- Reference Number

▶ **Using the Transfer A/R and Transactions utility**

1. In the Quick Launch, search for and select "Transfer A/R and Transactions."
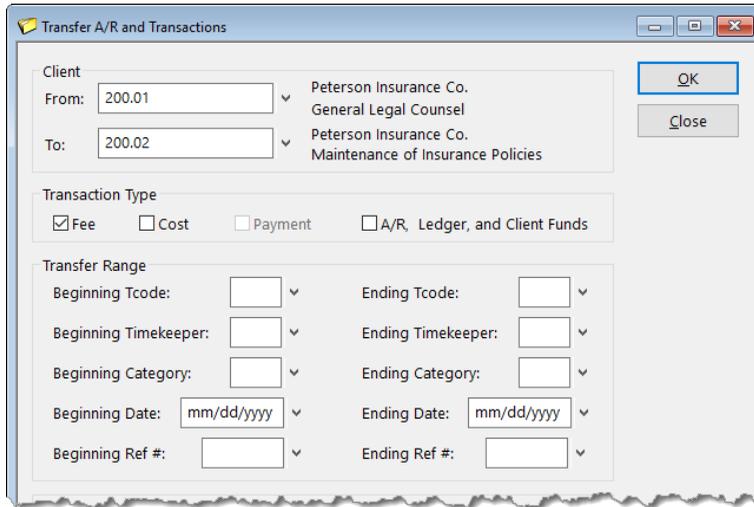
Figure 20, Transfer A/R and Transactions window

2. In the **From** and **To** fields in the **Client** section, select the matters you want to transfer the information from and to respectively.
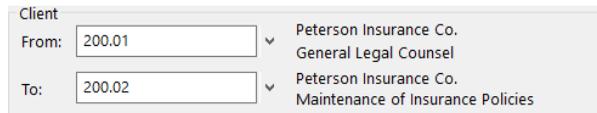
Figure 21, Client section

3. In the **Transaction Type** section, select the type(s) of transactions you want to transfer.

   • Select the **Fee** check box to transfer work-in-process fee transactions.

   • Select the **Cost** check box to transfer work-in-process cost transactions.

   • Select the **Payment** check box to transfer work-in-process payment transactions.

   • Select the **A/R, Ledger, and Client Funds** check box to transfer **all** Accounts Receivable, Client Ledger, and Client Funds information.
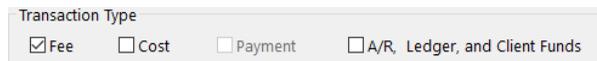
Figure 22, Transaction Type section

4. In the **Transfer Range** section, select the range of transactions you want to transfer.

   • To specify a range of Transaction Codes, fill in the **Beginning Tcode** and **Ending Tcode** fields.

- To specify a range of timekeepers, fill in the **Beginning Timekeeper** and **Ending Timekeeper** fields.

- To specify a range of categories, fill in the **Beginning Category** and **Ending Category** fields.

- To specify a range of dates, fill in the **Beginning Date** and **Ending Date** fields.

- To specify a range of reference numbers, fill in the **Beginning Ref #** and **Ending Ref #** fields.

Figure 23, Transfer Range section

5. Once you have specified the criteria you want to use, click **OK** to transfer the information to the client specified in the **To** field.

Note: You can print a verification list of transferred transactions when exiting the utility.

Change WIP Transactions

Menu:	*Maintenance	Transaction Related	Change WIP Transactions*
Home:	*All Actions	Transactions	Change WIP Transactions*
Quick Launch:	*Change WIP Transactions*

The Change WIP Transactions utility is used to change specified options for a range of fee, cost, and payment transactions in work-in-process. You can specify ranges of clients and transactions. Fields that can be changed include the **Status**, **Date**, **Task Code**, **Sales Tax**, **Bill Code**, **Category**, and **Rate** fields. This utility allows you to quickly make changes to multiple transactions.

For example, if a timekeeper's rate changes and Tabs3 Billing was not updated with the new rate, entries made for that timekeeper would use the old rate. You can use the Change WIP Transactions to automatically change all of that timekeeper's fees for the month to the new rate, thereby saving you the time of making the changes manually.

▶ **Using the Change WIP Transactions utility**

1. In the Quick Launch, search for and select "Change WIP Transactions."

2. From the **Client** tab, select the range of clients whose transactions you want to change. *(Note: If you want to change all clients' transactions, you must clear the* **Thru** *field.)*
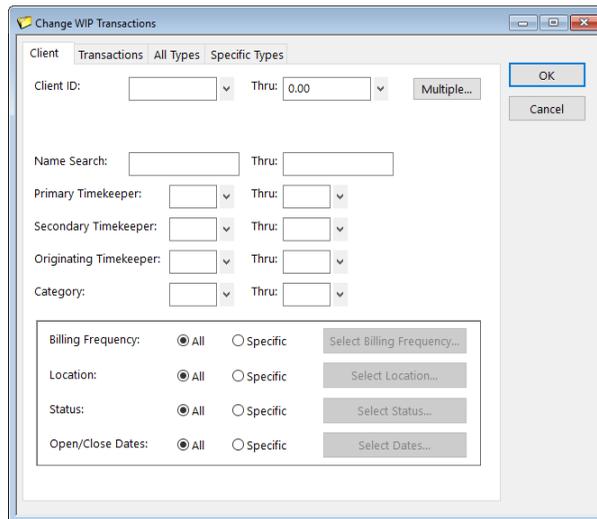
Figure 24, Change WIP Transactions - **Client** *tab*

3. From the **Transactions** tab, specify the range of transactions you want to change.

*Figure 25, Change WIP Transactions - **Transactions** tab*

4. From the **All Types** tab, you can optionally change the **Status** or **Date** fields of the specified transactions.

*Figure 26, Change WIP Transactions - **All Types** tab*

5. The **Specific Types** tab is divided into two sections: **Fees and Costs Only** and **Fees Only**.

*Figure 27, Change WIP Transactions - **Specific Types** tab*

6. You can make the following changes to fees and costs in the **Fees and Costs Only** section:

- **Convert Tcode to Task Code** - This option allows you to convert existing fee and cost transactions' tcodes to their corresponding phase/task and activity/expense codes.

- **Phase/Task** - This option allows you to convert fees and costs from one phase/task code to another.

- **Activity/Expense** - This option allows you to convert fees and costs from one activity/expense code to another.

- **Sales Tax** - This option allows you to convert fees and costs from one sales tax rate to another.

- **Bill Code**- This option allows you to convert fees and costs from one bill code to another.

> **Note:** Selecting **Convert Tcode to Task Code** will disable the **Phase/Task** and **Activity/Expense** options. Likewise, selecting **Phase/Task** or **Activity/Expense** will disable the **Convert Tcode to Task Code** option.

Figure 28, Fees and Costs Only section

7. You can make the following changes to fees in the **Fees Only** section:

    • **Category** - This option allows you to convert fees from one category to another.

    • **Rate** - This option allows you to convert fees from one rate to another.

Figure 29, Fees Only section

8. Once you have configured the settings you want to use, click **OK** to apply them to the specified transactions.

Note: You can print a verification list when exiting the utility that shows the transactions that have been changed.

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**.

Changing Work-In-Process Transactions

Adjust Flat Fee Clients

Menu:	***Statements	Statement Preparation	Adjust Flat Fee Clients***
Home:	***All Actions	Statement Preparation	Adjust Flat Fee Clients***
Quick Launch:	***Adjust Flat Fee Clients***

The Adjust Flat Fee Clients utility allows you to adjust fee transactions in work-in-process to equal the flat amount assigned in the Client file. The Adjust Flat Fee Clients utility only adjusts fee transactions for clients whose Billing Rate Code is "0" (zero). Cost transactions are not adjusted.

> **Tip:** More information on the Flat Fee billing method can be found in the Tabs3 Billing Help and the **Tabs3 Billing Methods Guide**.

> **Caution:** Make a backup before running this utility. Once flat fee clients have been adjusted, you cannot reverse the process unless you restore from a backup. You will be given the opportunity to make a temporary backup immediately after selecting this utility.

▶ **Using the Adjust Flat Fee Clients utility**

1. In the Quick Launch search for and select "Adjust Flat Fee Clients."

2. From the **Client** tab, select the range of clients whose fees you want to adjust. *(Note: Only matters that are configured for Flat Fee Billing will be affected.)*
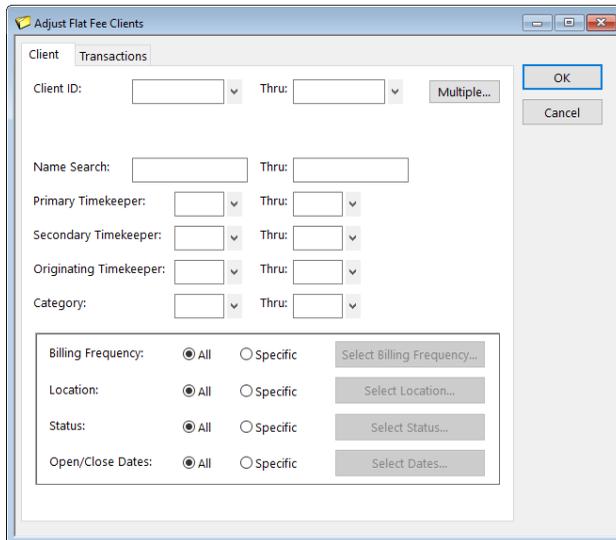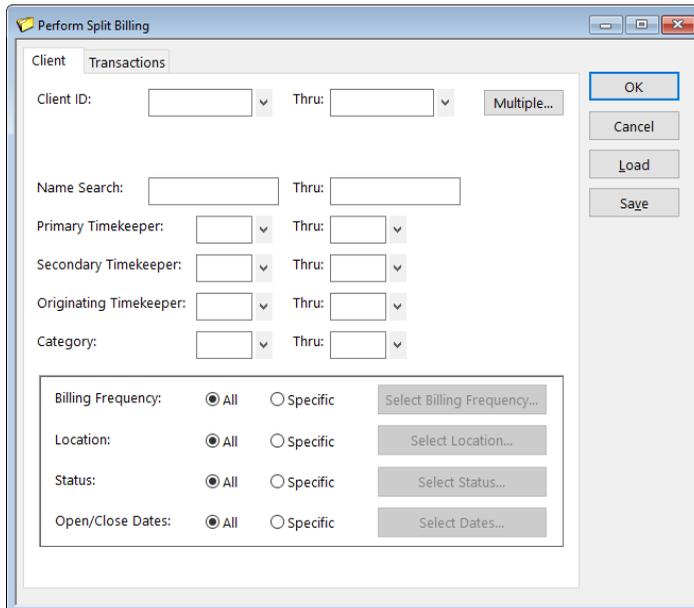

*Figure 30, **Client** tab*

3. Click the **Transactions** tab and select the range of fees you want to adjust.

*Figure 31, **Transactions** tab*

4. Click **OK** to begin the adjustment process.

> **Note:** You can print a verification list when exiting the utility that shows clients whose fees have been adjusted.

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**.

▶ Flat Fee Billing

Perform Split Billing

Menu:	***Statements	Statement Preparation	Perform Split Billing***
Home:	***All Actions	Statement Preparation	Perform Split Billing***
Quick Launch:	***Perform Split Billing***
Menu:	***Maintenance	Transaction Related	Undo Split Billing***
Quick Launch:	***Undo Split Billing***

The Perform Split Billing utility allows you to split the fee and cost transactions in a client's work-in-process using the split percentages and options defined for Split Billing matters. This utility will copy the transactions to the split matters and adjust the **Amounts**, **Hours Worked**, **Hours to Bill**, and **Units** of the specified transactions. You can reverse the split billing process using the Undo Split Billing utility.

More Info: More information on Split Billing can be found in the Tabs3 Billing Help and the **Tabs3 Billing Methods Guide**.

▶ **Using the Perform Split Billing utility**

1. In the Quick Launch, search for and select "Perform Split Billing."

2. From the **Client** tab, select the range of clients whose fees you want to adjust.
   (Note: Only matters that are configured for Split Billing will be affected.)

*Figure 32, **Client** tab*

3. Click the **Transactions** tab and select the range of transactions you want to split.

*Figure 33, **Transactions** tab*

4. Click **OK** to begin the splitting process.

Note: You can print a verification list when exiting the utility that shows clients whose transactions have been split.

▶ **Using the Undo Split Billing utility**

1. In the Quick Launch, search for and select "Undo Split Billing."
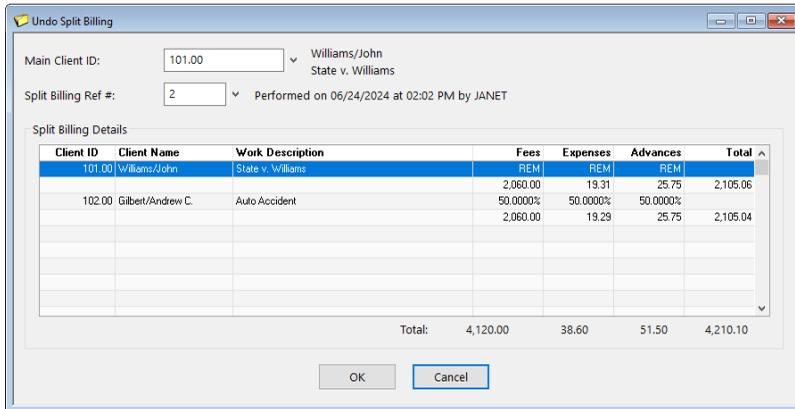
2. Perform the recommended backup if necessary.

Figure 34, Undo Split Billing window

3. In the **Main Client ID** field, select the main client whose split you want to reverse.

4. In the **Split Billing Ref #** field, select the split you want to reverse.

5. Verify the information in the **Split Billing Details** section is correct.

6. Click **OK** to reverse the split.

Note: You can print a verification list when exiting the utility that shows a list of splits that have been reversed.

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**.

Split Billing

Resources

Additional information on the features included in this guide is available via Tabs3 Software's built-in help files, Tabs3 Training Videos, and the Tabs3 Knowledge Base.

Built-in 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.

Knowledge Base

Tabs3 Software publishes an extensive Knowledge Base with advanced information. It contains information on Error Troubleshooting, Networking & Windows Issues, "How To" articles, and product-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**.

- **R10772** - Adjusting Work-In-Process
- **R11063** - Write-Up/Write-Down Functionality in Tabs3 Billing
- **R10832** - Transferring a Tabs3 Billing Credit Balance
- **R11616** - All About Tabs3 Split Billing
- **R11296** - Including Sales Tax with a Flat Fee

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

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**.

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