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Customizing PracticeMaster Guide

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Customizing PracticeMaster Guide

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Table of Contents

Introduction **6**

Purpose of this Guide 6

How to Use This Guide 7

Part 1 - Customizing the Database **8**

File Maintenance 9

File Definitions 9

Field Tab 10

Index Tab 12

Form Designer 14

Implementing New Fields 19

Example: Adding a "Date of Last Contact" field to the Client File 19

Form Designer Control Panel 21

Customizing the Data Files 23

Determining What Data to Store 23

Data Storage Options 23

Virtual Fields 31

Considerations for Where to Store Data 34

Areas of Practice 43

Using Predefined Area of Practice Templates 43

Installing Areas of Practice 43

WorkFlows 44

Part 2 - Day-to-Day Features **45**

Quick Clicks 46

Introduction to Quick Clicks 47

Manage Quick Clicks 49

List Preferences 51

Preferences for the List Tab 51

List Preferences for PracticeMaster Matter Manager 52

Column Layouts 56

The Default Column Layout 58

The Restricted Column Layout 58
Filtering Data 59
Search Box 59
Predefined Filters 60
Custom Filters 61
Optimizing Filters with Indexes 62
Sort Order 63
QuickViews and Smart tabs 65
Calendar 68
Calendar Window 68
Calendar Rights 69
Calendar Properties 70
General Tab 72
Display Fields 72
Event Colors 74
Task List Tab 75
Column Layout 75
Index to Use for Sorting 75
Time Zone Tab 75
Calendar Plans & Calendar Plan Templates 76
Creating a Calendar Plan Template 76
Generating a Calendar Plan 78
Calendar Plan Templates and WorkFlows 79
Outlook® Synchronization 80
Conflict of Interest Searching 81
Reviewing Which Fields are Conflict Checked 83
Convert to Fee Settings 86
Other Areas to Customize 89
History Tracking 89
Email Preferences 90
Matter Manager 92
Custom Activity Lists 93
Custom Taskbar 93

Timer Preferences & Visual Timer Display Properties 94
Visual Timer Display Properties 95
eNote Preferences 96

Part 3 - Focus Areas **98**
Check Requests 99
Overview 99
Check Request Settings 103
Document Management 106
Document Assembly 107
Overview 107
Word Document Assembly 107
HotDocs Document Assembly 108
Report Writer 110

Resources **111**
Guides & Quick Guides 111
Sample Reports 111
Training Videos 111
Knowledge Base 112
Help 112
Tabs3 Support 112
Tabs3 Consultants 113

Index **114**

Introduction

PracticeMaster is a comprehensive practice management software application for law firms that incorporates a great deal of features. So many features, in fact, that we created a guide to help you know where to start.

PracticeMaster is set up so that it can be used out of the box when you start using the software. However, PracticeMaster's real strength and power lies in its ***tremendous flexibility***.

Purpose of this Guide

To help you harness the power of the software, we have developed this ***Customizing PracticeMaster Guide***. This guide will help you learn how to take advantage of that flexibility, help you learn how to configure PracticeMaster to best meet your firm's needs, and show you how you can customize the different areas of PracticeMaster to work for you. With this guide, you can familiarize yourself with the areas you want to incorporate first, which can help you develop a rollout plan.

You don't need to read this guide from cover to cover (although you most certainly can). Instead, you can read only the areas you are interested in when you are ready to work with those features. For example, if you are primarily interested in implementing the Calendar, just read that section for now. Likewise, if you want to learn about Document Assembly, read that section. Many sections of this guide cover the basics and also provide the in-depth resources you will want to use to learn about best practices and how to implement those features.

You may simply want to scan the Table of Contents and decide which areas you want to work with first. You can do the customization yourself; or, if you prefer, you can work with one of our many qualified consultants *(page 113)* to help you streamline this process.

How to Use This Guide

The information in this guide is presented in three distinct sections.

Part 1 - Customizing the Database

The content in this section is aimed towards the Law Firm Administrator or the person(s) most interested in deciding what information needs to be included in the database. This section presents information to consider when determining how you want to modify the data files to best meet your firm's needs. The information in Part 1 discusses the different types of files, how to use File Maintenance to modify and create fields and files, how to use Areas of Practice, how to modify your data entry screens using the Form Designer, and where you can learn about how to use the extremely powerful WorkFlows to help manage your cases.

Part 2 - Day-to-Day Features

The content in this section includes how you can easily customize the various features that are used by attorneys, paralegals, and all other employees in the firm on a daily basis. This section includes features such as Quick Clicks, the PracticeMaster Calendar, Outlook integration, conflict of interest searching, converting items to fees, Task Folders for navigation, and more.

Part 3 - Focus Areas

The content in this section includes information on the areas that you will want to implement at some point once PracticeMaster is installed. It's not easy to change everything all at once, and these areas are ones that can be implemented when needed or when you are ready to take the next steps, such as document management, document assembly, and PracticeMaster Report Writer.

Part 1 - Customizing the Database

Part 1 of the ***Customizing PracticeMaster Guide*** outlines the process of customizing the database to match your firm's specifications.

The content covered in this section includes:

- An overview of the ***File Maintenance*** utility, including instructions for adding fields and indexes
- An introduction to the ***Form Designer***, with instructions on adding fields to PracticeMaster form layouts
- Information on the various ***types of files*** available for customization, and an in-depth look at how to determine which file should be used to store particular types of information
- An introduction to ***Areas of Practice***, and instructions on how to install predefined Area of Practice templates
- An introduction to ***WorkFlows***, a powerful tool used for automating common tasks

File Maintenance

Menu: ***Maintenance | File Maintenance***
Home: ***All Actions | Maintenance | File Maintenance***
Quick Launch: ***File Maintenance***

The File Maintenance utility is one of the most powerful parts of the PracticeMaster software, allowing you to customize the data files as you see fit. Add additional files and fields to track the information your firm needs most, and remove fields that aren't of use. You can also customize file indexes to speed up the process of sorting records on the **List** tab of each file.

The File Maintenance window consists of a file tree structure that includes all files in PracticeMaster. Clicking the plus (+) symbol to the left of a branch expands the branch to display the various files. Likewise, clicking the minus (-) symbol to the left of a branch will collapse its contents.

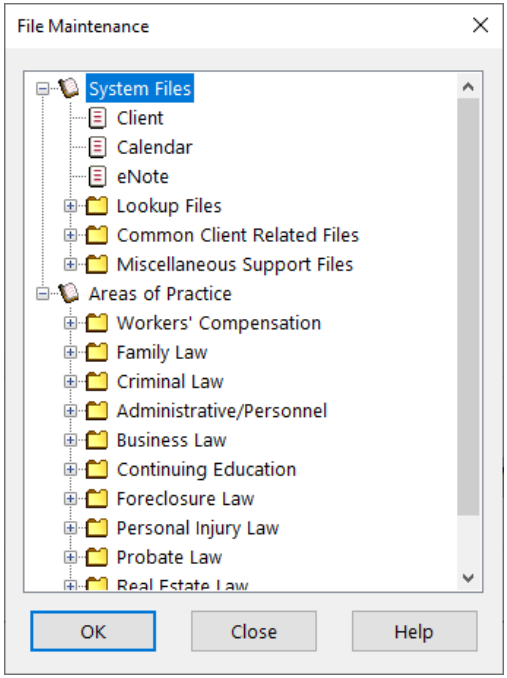


Figure 1, File Maintenance window

Note: The File Maintenance utility is an exclusive task, meaning that all other users must exit PracticeMaster before you can access this feature.

Tip: You will be prompted to make a backup prior to accessing the File Maintenance utility. Making a backup allows you to quickly reverse any changes made and protects you from potential data corruption if the File Maintenance utility is interrupted.

File Definitions

Once the File Maintenance window is displayed, double-click the desired file to display the File Definition window. The File Definition window consists of **Main**, **Field**, **Index**, and **Utility** tabs. The **Field** and **Index** tabs are the most important tabs in File Maintenance. These tabs allow you to access the information that can be customized.

Field Tab

The **Field** tab in the File Definition window is used to add, edit, rename, or delete fields in a file *(Figure 2)*. A maximum 500 user-defined fields can be defined in a file in addition to protected fields.

Fields can be added or modified using the **Field** tab. Once a field has been added, it can then be added to a form layout using the Form Designer *(page 14)*. Once a field has been added to Form Designer, you can begin using that field during data entry.

Each field must be assigned a **Field Type**. There are fifteen field types in PracticeMaster. Field types are used to classify the type of information that can be entered into a field. Common field types include alpha, date, number, money, phone, email, web page, and more.

Note: For more information on field types, see PracticeMaster Help.

The **Help Text** field allows you to enter explanatory text that will be displayed as a screen tip when a user hovers over a field during data entry. This makes it easy for users to determine the purpose of a specific field and lets them know what they need to enter.

When creating or modifying fields, you can also edit the **Custom Properties** for that field. The Custom Properties available differ depending on which **Field Type** is selected. Some particularly useful Custom Properties are explained below; full details on the complete list of Custom Properties can be found in PracticeMaster Help.

Required	Fields that are marked as **Required** must be filled in before a user can save the record.
Track History	The **Track History** field is used in conjunction with the History Tracking feature *(page 89)* to provide an audit trail of additions and changes made to a particular field.

Restrict Changes

The **Restrict Changes** field is used to indicate whether users must have access rights to **Change <file name> Restricted Fields** for the current file in order to make changes to the field. If **Restrict Changes** is selected, this field will be read-only for users who do not have access rights to **Change <file name> Restricted Fields** for the current file. Field restrictions apply when changing an existing record; they do not apply when adding a record.

Include in Conflict Search
Include in Contact Search
Include on Conflict Report

These fields are used in Conjunction with the Conflict of Interest and Contact Search reports. More information on each of these fields can be found on page 81 of this guide.

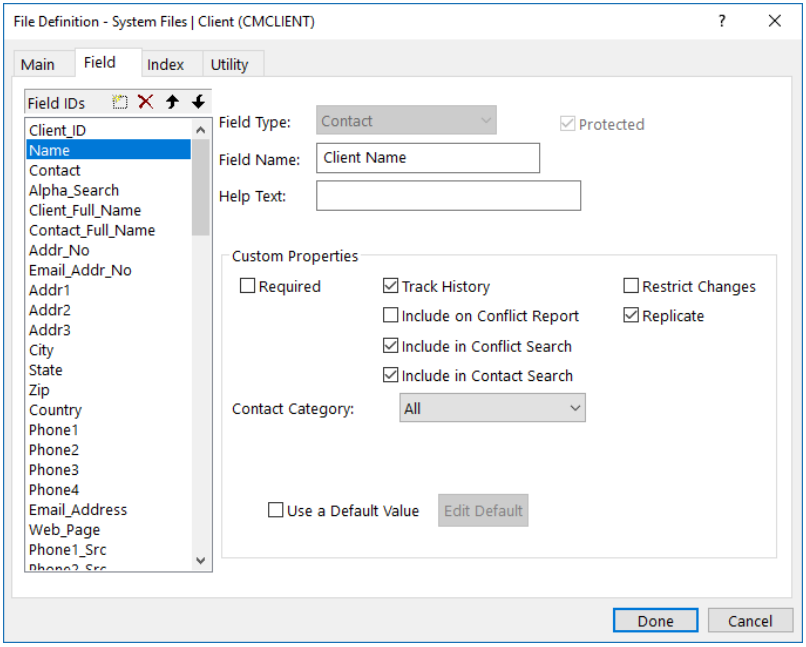


*Figure 2, File Maintenance - **Field** tab*

▶ To add a field to an existing file definition

1. In the Quick Launch, search for and select "File Maintenance."
2. From the File Maintenance window, click the plus (+) sign next to the System Files or Areas of Practice to display the corresponding list(s) of files.

3. Double-click the file you want to edit and select the **Field** tab.
4. Click the icon or press Ctrl+N. A field named "New Field" will be created in the Field IDs list.
    a. Replace the "New Field" text with the name you want to use for your field.
    b. Select the desired **Field Type**.
    c. Optionally, modify the default **Field Name**.
    d. Select the desired **Custom Properties**.
        - If the field should be included in the Conflict of Interest Search, be sure to select the **Include in Conflict Search** check box.
    e. Optionally, use the and icons to reposition the field in the list of Field IDs. The order of the Field IDs determines the order of the fields on the **Default** file layout.
5. Click **Done**.
6. Use the Form Designer to add the field to the data entry screen. More information on the Form Designer and form layouts can be found on page 14.

Index Tab

Indexes are used to specify the order in which records are displayed within a file. Indexes defined in File Maintenance are permanent indexes. Although you can click on any column heading in a lookup window to change the sorting order, permanent indexes provide the added benefits of faster sorting and the ability to define multiple sort orders (e.g., sort by client name and then primary timekeeper). Each index can have up to four sort orders defined. Once defined, you can use indexes in Editor windows, QuickViews, and reports. For non-Platinum users, up to 15 user-defined permanent indexes can be created per file. For Platinum users, up to 30 user-defined permanent indexes can be created.

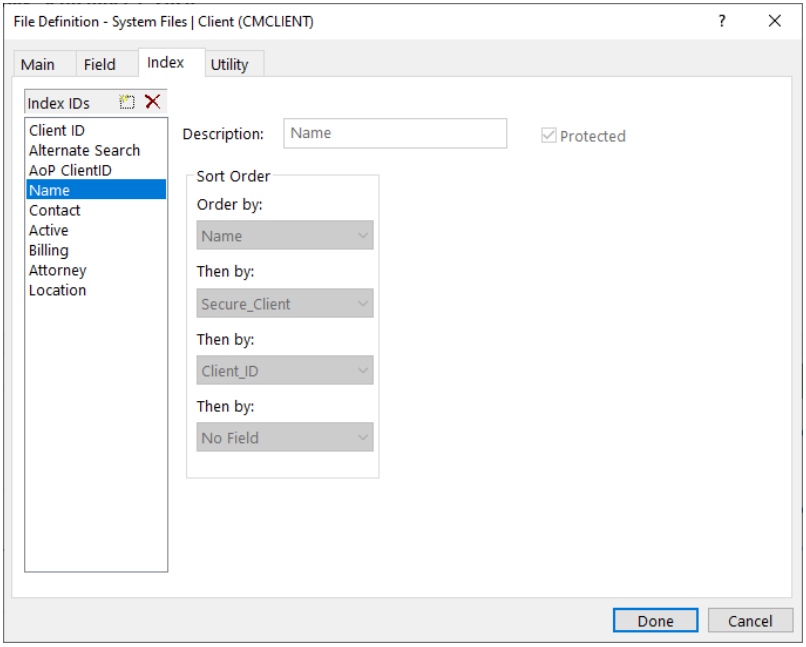


*Figure 3, File Maintenance - **Index** tab*

▶ To create a new index

1. In the Quick Launch, search for and select "File Maintenance."
2. From the File Maintenance window, click the + next to System Files or Areas of Practice to display the corresponding list of files.
3. Once you have located the desired file, double-click the file and select the **Index** tab.
4. Click the icon to add a new index.
5. Under the **Index IDs** list, enter the new **Index ID** by replacing the "New_Index" text shown.
    a. Enter the desired **Description**.
    b. Enter the desired **Sort Order**.
6. Click **Done** to complete the process. When asked to confirm whether you want to continue, click **Yes**.

Form Designer

Menu ***File | Open | (File Name) | Edit | Form Designer***

The Form Designer is used to create form layouts. Form layouts are used to determine the arrangement of fields on the data entry screens in an Editor window. The Form Designer is also used to specify the tab order of the fields in an Editor window. This makes it easy to set the flow of data entry to your firm's specifications. The Form Designer uses a graphical user interface complete with drag-and-drop capabilities.

To access the Form Designer, you must be on the **List** tab of the file you want to edit. From the **List** tab, click **Edit**, then select **Form Designer**.

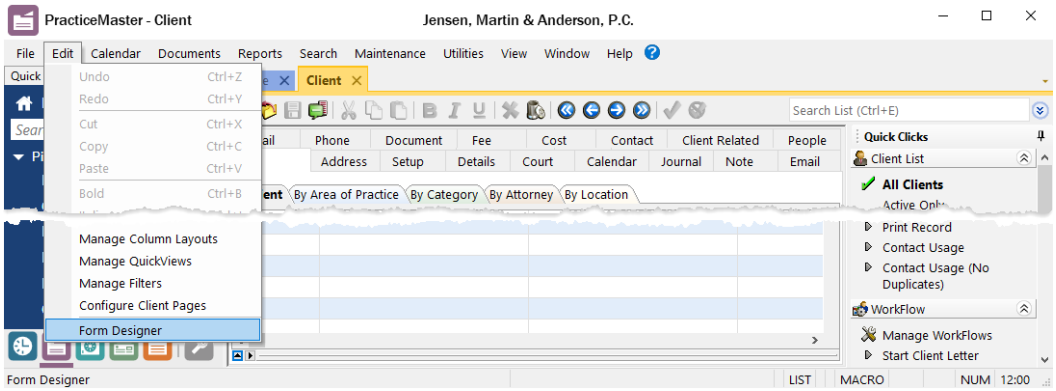


Figure 4, How to access Form Designer

The Form Designer is made up of tabs, referred to as pages. Each page contains various elements, including fields, labels, and group boxes. By moving and resizing these fields, you can create a form layout that works best for your firm.

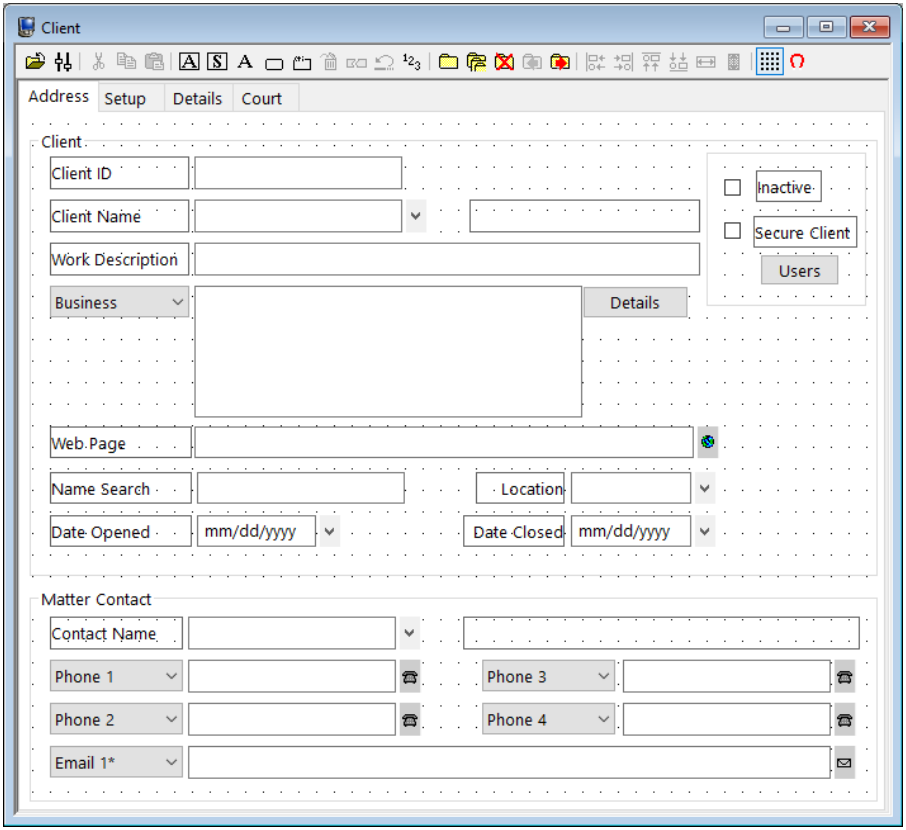


Figure 5, Form Designer window

▶ To add a field to a PracticeMaster form layout

1. From the PracticeMaster **File** menu, point to **Open** and select the file for the form layout you want to edit.
2. From the **Edit** menu, select **Form Designer**.
3. In the Form Designer window, select the tab (page) where you want the new field to appear.
4. Click the (Add Field) button on the toolbar.
5. In the **Field Selection List** *(Figure 6)*, locate and double-click the field you want to add. The field will appear at the top left corner of the form.

a. Click the new field and hold down the mouse button.

b. While holding down the mouse button, drag the field to the desired location on the form.

6. Click the (Run Form) button on the toolbar.
7. Click **Yes** when prompted to save your changes.

The field will now be available for data entry.

Tip: The Form Designer toolbar includes various sizing and positioning buttons that help place newly added fields in the desired position. More information on the Form Designer toolbar can be found in PracticeMaster Help.

All fields in a file can be added to one or more pages. The **Other Pages** column of the **Field Selection List** *(Figure 6)* includes a count of all pages that the selected field appears on (not including the currently selected page).

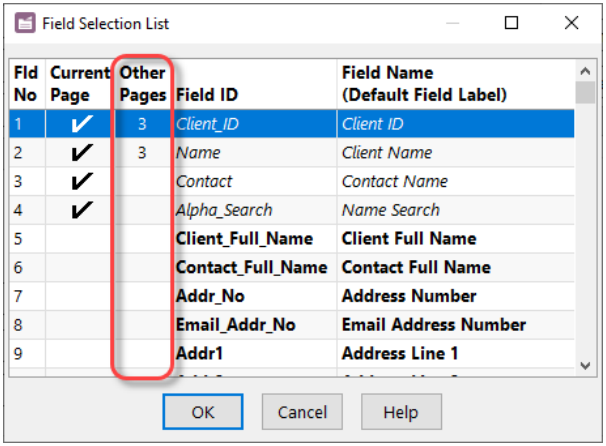


*Figure 6, **Other Pages** column of **Field Selection List***

You can organize related fields by adding them to a new page. For example, the **Court** page contains fields specific to an individual matter's court information *(Figure 7)*.

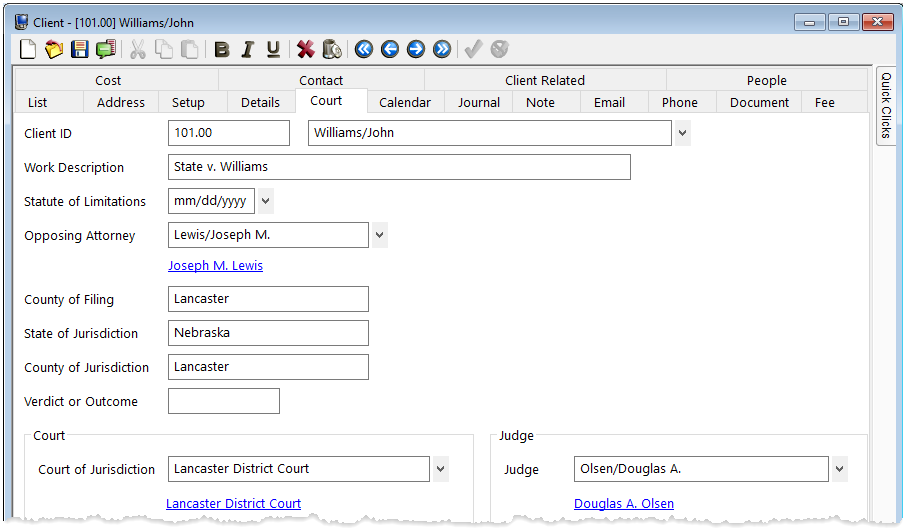


*Figure 7, Client file **Court** tab*

▶ To Add a Page in the Form Designer

1. From the Form Designer window, click the icon, or right-click the form layout background and select the **Add New Page** menu option.
2. A new page will automatically be added with a default page name.
3. Right-click the page and select the **Rename Page** menu option.
4. The **Page Name** window will be displayed allowing you to specify the desired page name.

You can now add the desired fields to the page.

After adding or otherwise changing fields in the form layout, you may also want to edit the tab order of the fields. The tab order represents the order used when a user tabs through the fields on the page.

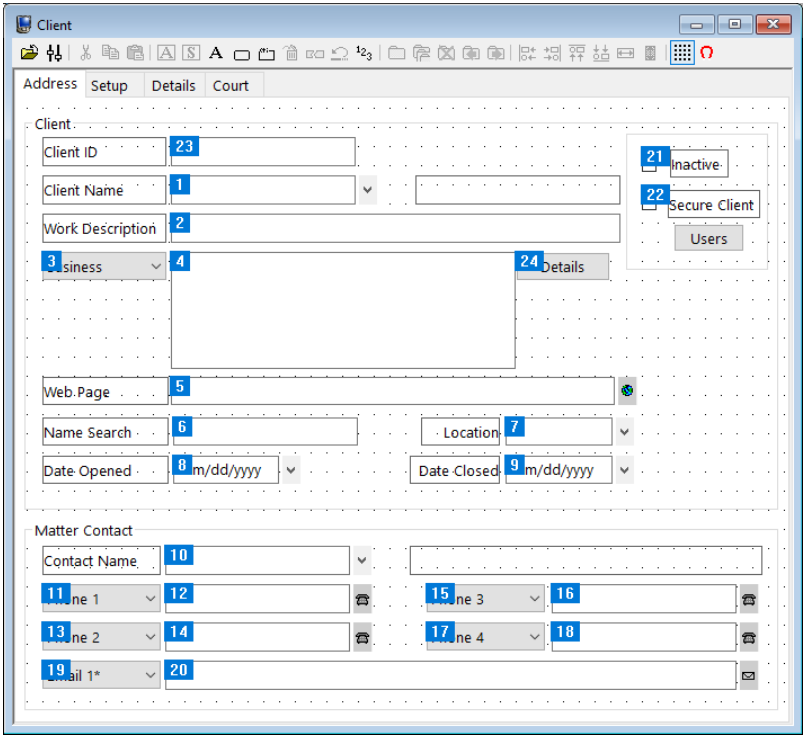


Figure 8, Form Designer window with Tab Order displayed

▶ To Set the Tab Order of Fields on a Page

1. From the Form Designer, click the tab of the desired page.
2. Click 123, or right-click the page and select the **Set Tab Order** menu option.
3. A number in a colored box will be shown next to each field. These numbers represent the current tab order.
4. Once the numbers are displayed, you have two options—you can reset the tab order for all fields, or you can reset the tab order for selected fields.

   To reset all fields: Click the field you want to come first in the new tab order. Click the field you want to come second in the new tab order. Click the field you want to come third in the new tab order, etc. until all fields are in the desired order. The tab order will update automatically as you click on each field.

   To reset selected fields: Set the counter by holding the *Ctrl* key and then clicking

on a field. Although nothing will have appeared to happen, the counter will have been set to that number. The next field you click will increment the counter by one and adjust all subsequent fields. For example, let's say you want to switch fields 8 and 9. First set the counter to 7 by holding the Ctrl key and then click on field 7. Next click on field 9 which will be changed to field 8. The old field number 8 will automatically be changed to 9 since there cannot be two fields with the same tab order.

5. Finalize your changes by clicking the (Run Form) button.

More Info: Additional information regarding the Form Designer can be found in PracticeMaster Help.

Implementing New Fields

To summarize, there are two parts to adding additional fields to existing data files.

1. Add the field to the file via File Maintenance.
   See "To Add a Field to an Existing File Definition" on page 11
2. Add the field to the data entry screen via the Form Designer.
   See "To Add a Field to Form Layout" on page 15

To demonstrate this entire process, the following example provides step-by-step procedures using a specific scenario.

Example: Adding a "Date of Last Contact" field to the Client File

Let's say you want to add a new date field called "Date of Last Contact" to the Client File. You need to add the new field to the data file structure via File Maintenance and then add the field to the data entry screen via the Form Designer.

Note: All other users must exit the software in order to perform these steps.

▶ Part 1 - To add a "Date of Last Contact" field to the Client file

1. In the Quick Launch, search for and select "File Maintenance."
2. Double-click **Client**.
3. Click the **Field** tab.

a. Click the button to insert a new field.

b. Type over the "New_Field" text with the appropriate name for the field. For this example, we will name the field "Date of Last Contact" ..

c. From the **Field Type** drop-down, select **Date**.

4. Click **Done**.
5. Click **Yes**.
6. When the Task Completed message is displayed, click **OK**.

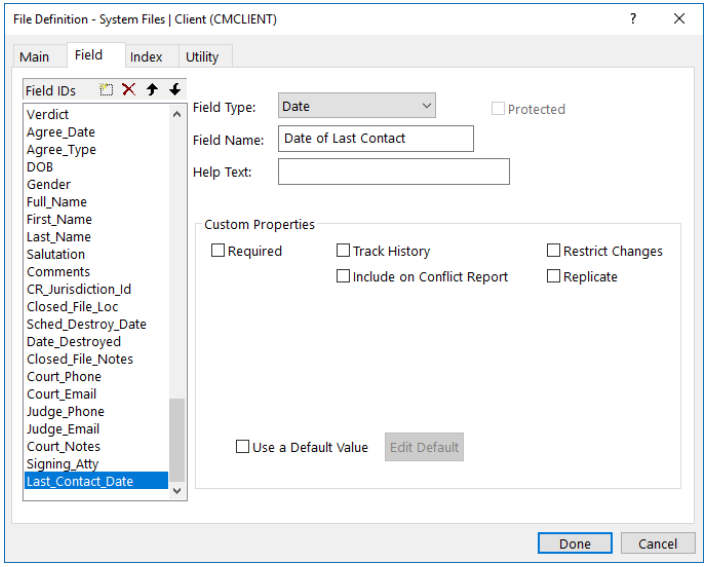


*Figure 9, Example of **Date of Last Contact** Date field*

▶ Part 2 - To add the "Date of Last Contact" to the Form Layout

1. In the Quick Launch, search for and select "Client File."
2. From the **List** tab, select ***Edit*** | ***Form Designer***.
   a. Click the page on which you want the **Date of Last Contact** field to appear.
   b. Click the button on the Form Designer toolbar.
      i. From the **Field Selection List** window, scroll down and select the "Last_Contact_Date" field.
      ii. Click **OK**.
   c. Click and drag the field to the desired position.
   d. Click the button.

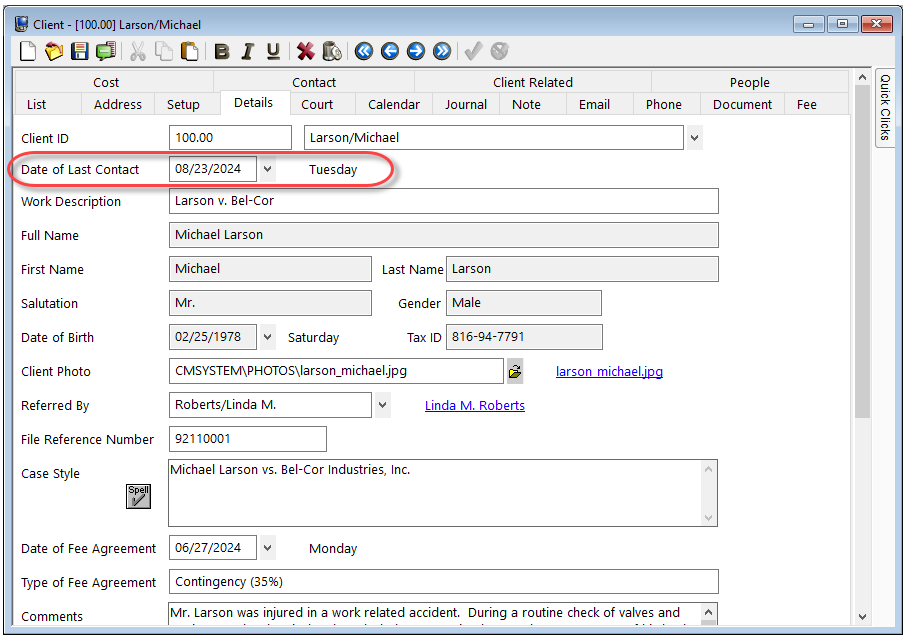


*Figure 10, **Date of Last Contact** field added to Client file*

Form Designer Control Panel

A file's font can be modified to improve legibility and spacing via the Form Designer Control Panel ( ).

Standard Font

Select this option to use the standard font face (Segoe UI) and size (10pt).

Classic Font

Select this option to use the font face (MS Sans Serif) and size (8pt) that was used in prior versions of the software (i.e., Version 18 and earlier).

Custom Font

Select this option to specify a font face and size manually. When this option is selected, the **Select** button will be available to display the Font window to choose a font face and size.

Apply Font to All PracticeMaster Files

Select this check box if you want to change all files in PracticeMaster to use the selected font face and size. Otherwise, clear this check box if you only want to only change the font for the current file.

Additionally, you have the option to **Reset to Generic Layout**, which changes the form to simply list all fields in a single column, or **Reset to OEM Layout**, which changes the layout back to the layout provided in the software for the current version.

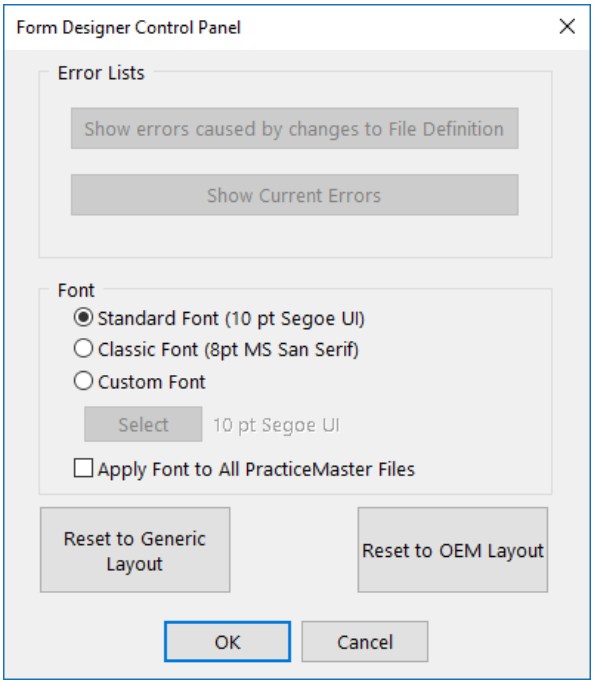


Figure 11, Form Designer Control Panel

Customizing the Data Files

One of PracticeMaster's most powerful features is its customizability. When first starting to use PracticeMaster, most firms start out using the default data files provided with the software. PracticeMaster's default data files store information common to the majority of firms. However, before long, you may find that you want to add fields to PracticeMaster for storing additional data that your firm needs to track.

Determining What Data to Store

Before adding additional files and fields to PracticeMaster, you need to determine what information needs to be tracked, reported on, and used in documents. You must gather the information needed, organize it into categories, and then determine the best method for storing the data.

The easiest way to do this is to gather hard copies of all of the commonly used documents, beginning with client questionnaires and client intake forms. Include form letters, email, motions, reports, communications, and any other commonly used documents. These documents will help you decide what information to track in your database files.

Once you've gathered the hard copies, highlight all of the information that will be stored in PracticeMaster. You will then use this as a blueprint to determine whether to add a field to an existing file or create a new file for storing the information.

Keep the hard copies of the documents. You can use these documents later when you start to incorporate the document assembly features in PracticeMaster *(page 107)*.

Data Storage Options

Once you have determined what data you want to store in PracticeMaster, you must decide where the data should be stored. You can add fields to existing files, or you can add new files. There are several types of files in PracticeMaster.

The following diagram of the File Maintenance window shows the different types of files. For example, you can add fields to the Client file, the Calendar File, or the Contact file. The Contact file is an example of a Lookup file, which is used to store information that can be referenced via a field in another file. You can create your own user-defined Lookup files for information you want to reference in another file. Common Client Related files and Area of Practice files also have unique characteristics, as shown in the diagram.

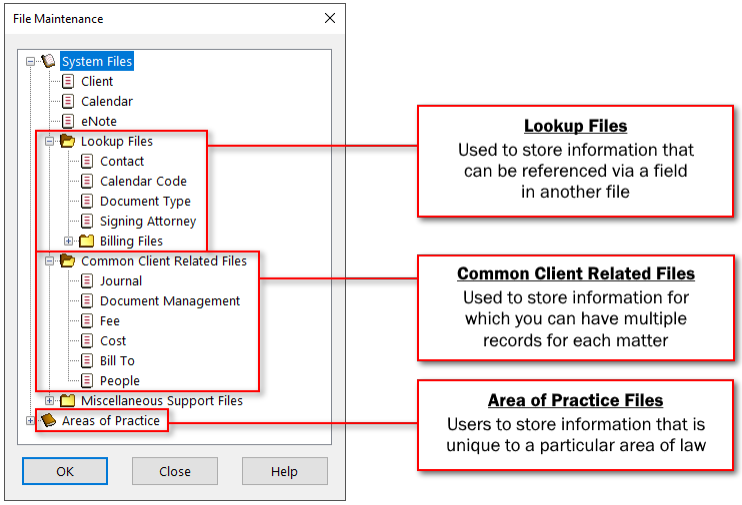


Figure 12, Customizable Files in PracticeMaster

The following information lists the different files where data can be stored and describes the type of data stored in each file.

Client File Use the ***Client File*** to store single pieces of information that can apply to all matters, regardless of the matter's Area of Practice. Related fields can be combined onto a single page using the Form Designer *(page 17)*. For example, the **Court** tab contains fields relating to a particular matter's court information, such as County of Filing, Court of Jurisdiction, and Judge *(Figure 13)*.

Advantages

- Available for ALL matters
- Can use Category pages to only display data for matters assigned to a specific Area of Practice *(page 30)*
- Does not require a File Access code in Word document assembly

Disadvantages

- Cannot store multiple records for a single matter (e.g., children)

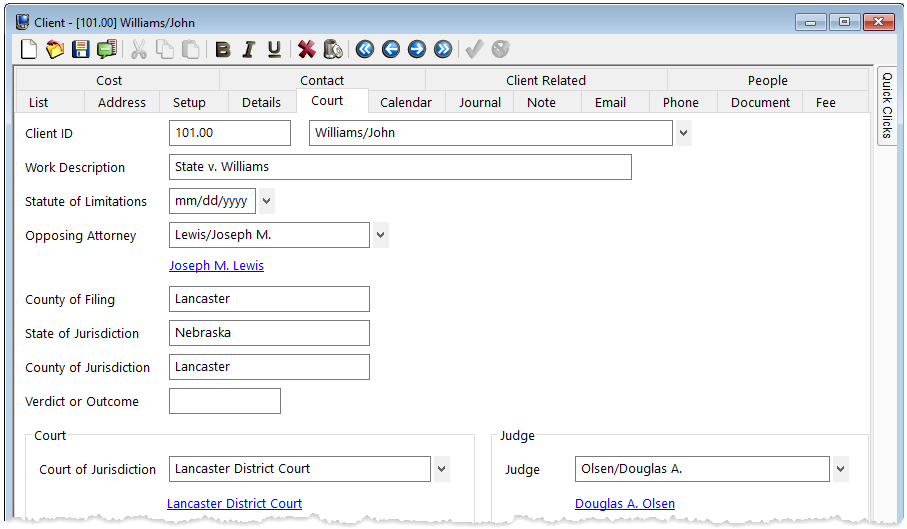


*Figure 13, Client File, **Court** tab*

Contact File

Use the ***Contact File*** to store information common to different types of contacts in this file, such as address, email, gender, contact preferences, etc. Contacts can be categorized by one or more types when the individual contact is added, such as Attorney, Medical Provider, Adjustor, etc. You can use the Contact File to store fields for one or more types of contacts. For example, you may have a field for attorneys that lists the states in which they are licensed to practice law.

Advantages

- One location for contact information
- Data optionally synchronizes to Outlook
- Use Category pages to prevent data from showing for all contacts

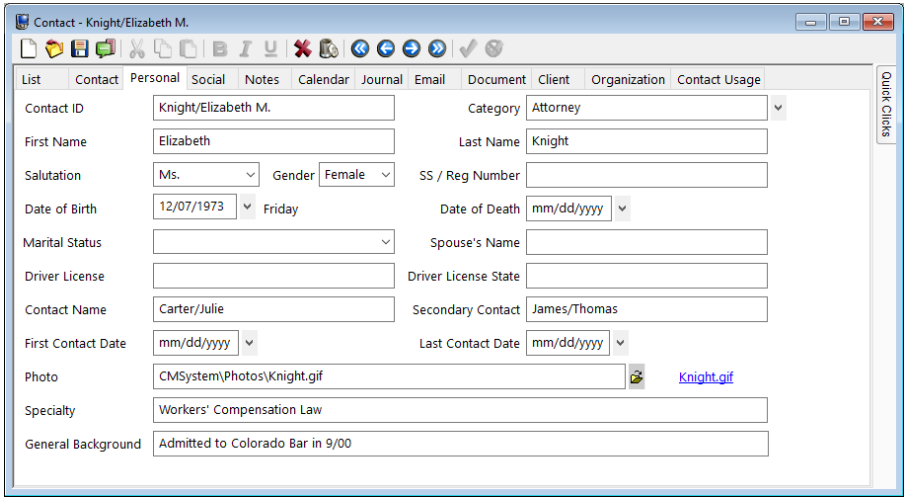


*Figure 14, Contact File, **Misc** tab*

Common Client Related Files

Use ***Common Client Related Files*** to store information for which you can have multiple records for each client. The Fee file is an example of a common client related file. All matters can have fees, and each matter can have multiple fees.

Advantages

- Stores multiple records per matter
- Can be used for multiple areas of practice
- Used for information that applies for all matters
- Can optionally show a tab in the Client Editor window (***List tab | Edit | Configure Client Pages***)

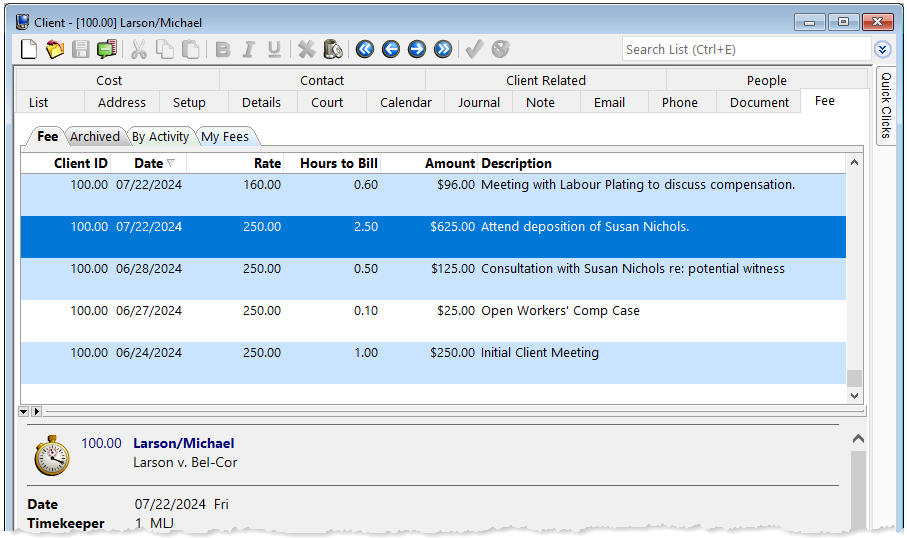


Figure 15, Example of a Common Client Related page

Area of Practice Files

Use ***Area of Practice Files*** to store information that is unique to a particular area of law. For example, personal injury matters may require medical record information that is not required for real estate matters. Likewise, real estate matters may require inspection information that is not required for personal injury matters.

Advantages

- Data is grouped by file for that type of matter (e.g., spouse info, dependents, stockholders, etc.)
- Accommodates one record or many records for each matter
- Can store contact information in Area of Practice file or link to Contact File (virtual)
- The tabs change in the Client file based on the client's Area of Practice
- Can use the Import Area of Practice feature to import file structures

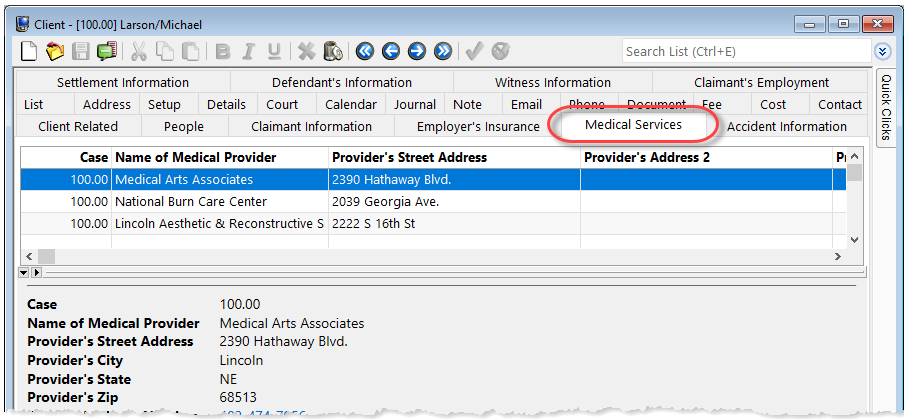


Figure 16, Example of an Area of Practice file

Lookup Files

Use a ***Lookup File*** to store information that can be referenced via a field in another file. Lookup files can vary in complexity.

- The **Document Type** file lookup file that allows you to select from a list of document types.
- The Contact file is a lookup file. You can view contact information via the Client File to provide an address on the **Address** tab.
- You can set up a Lookup File to store additional signatory and letterhead information for users.
- You can set up a Case Status lookup file to track a matter's current case status. More information on this example can be found on page 42 *(Figure 26)*.

Advantages	Disadvantages
• Can add a field to any file to link to a record in a lookup file • New records can easily be added "on the fly". • Enter data once and link to it multiple times	• Cannot restrict selection to existing values

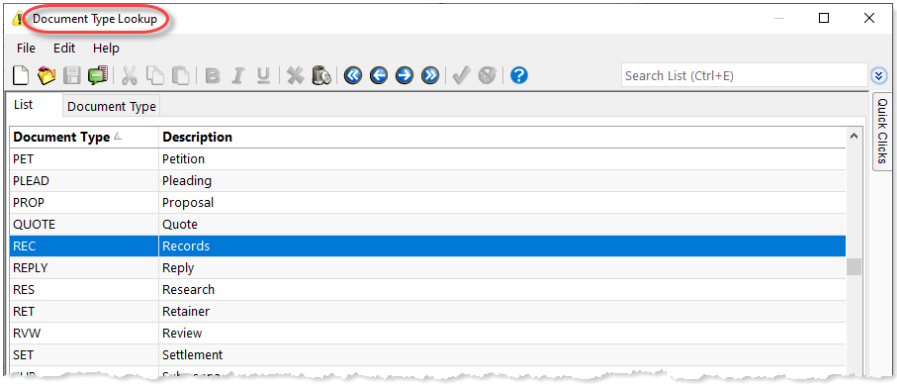


Figure 17, Example of a Lookup File

Category Pages

Category Pages are a special type of page that are used in the Client file, Contact file, and Journal file. You can use the Form Designer to design how the pages will look.

- ***Client category pages*** are configured for individual Areas of Practice (e.g., Personal Injury, Family Law, Workers' Compensation, etc.). These pages will only appear when a client belonging to that Area of Practice is selected.
- ***Contact category pages*** are configured for individual contact categories (e.g., Attorney, Insurance Adjuster, Witness, etc.). These pages will only appear when a contact belonging to that contact category is selected.
- ***Journal category pages*** are configured for individual journal record types (e.g., Email, Phone Task, Research Task, etc.). These pages will only appear when a journal record of that record type is selected.

Advantages	Disadvantages
• Allows you to limit data entry to associated record types • Can reduce the number of visible pages, improving the organization of the client file.	• File limit of 450 user-defined fields in addition to protected fields.

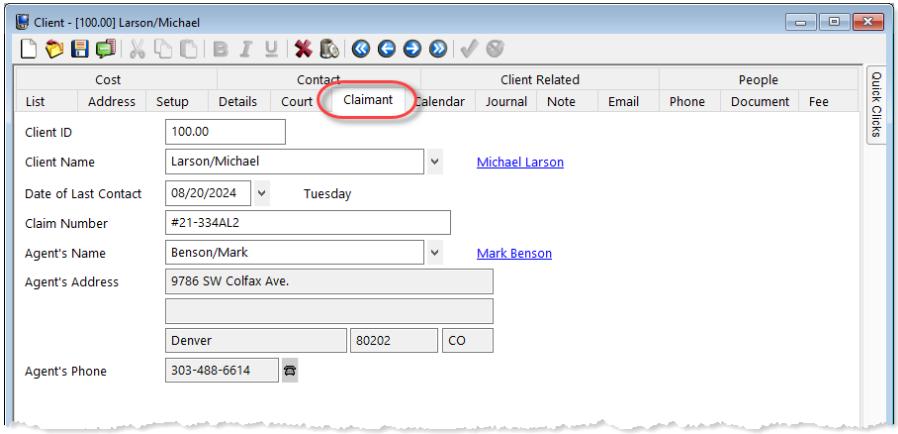


Figure 18, Example of a Client Category page

More Info: Additional information regarding Category Pages can be found in Knowledge Base Article **R10566**, "Category Pages in PracticeMaster."

Virtual Fields

A virtual field is a field that links to another field in a lookup file *(page 29)*. Virtual fields are used to display information stored in lookup files in another file. For example, several of the fields on the **Address** tab of the Client file are virtual fields that link to information stored in the Contact file *(Figure 19)*. Virtual fields are read-only; that is, the information cannot be edited from the currently opened file. Instead, changes must be made via the file that contains the virtual field information.

Virtual fields are an ideal method for displaying information that is already stored in a field via a lookup file. Rather than reentering the information again in an identical field in the file in which you want to display this information, you can simply link to the lookup file. This eliminates the risk of potentially entering inconsistent data or forgetting to update one or more fields.

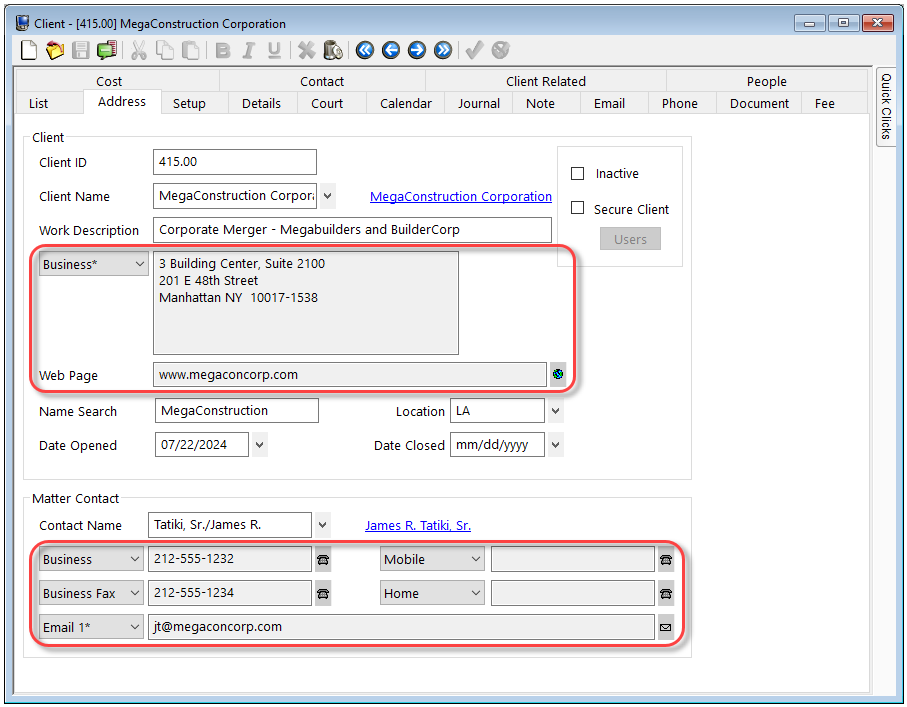


*Figure 19, Virtual Fields in the **Client** file*

To demonstrate how virtual fields work, the following example provides step-by-step procedures for a specific scenario. Let's say you want to display a contact's phone number and email address on the calendar record. Doing so allows users to see this information without having to click a button to open the Contact file.

▶ Part 1 - To add "Contact Phone #" and "Contact Email" fields to the Calendar file

1. In the Quick Launch, search for and select "File Maintenance."
2. Double-click **Calendar**.
3. Click the **Field** tab.
   a. To add the **Contact Phone #** field to the Calendar file:
      i. Click the button to insert a new field.
      ii. Type over the "New_Field" text with the appropriate name for the field. For this example, we will name the first field "Contact_Phone".
      iii. From the **Field Type** drop-down, select **Virtual**.
      iv. Replace the **Field Name** text with the desired label for the field. For this example, we will enter "Contact Phone #".
      v. From the **Lookup Field** drop-down, select **Related_Party**.
      vi. From the **Field To Copy From** drop-down, select **Phone 1** *(Figure 20)*.

   b. To add the **Contact Email** field to the Calendar file:
      i. Click the button to insert a new field.
      ii. Type over the "New_Field" text with the appropriate name for the field. For this example, we will enter "Contact_Email".
      iii. From the **Field Type** drop-down, select **Virtual**.
      iv. From the **Lookup Field** drop-down, select **Related_Party**.
      v. From the **Field To Copy From** drop-down, select **Email Address**.
4. Click **Done**.

▶ Part 2 - To configure the Calendar file to display contact phone and email information

1. In the Quick Launch, search for and select "Calendar."
2. From the **List** tab, select ***Edit*** | ***Form Designer***.
   a. Click the page on which you want the **Contact Phone #** and **Contact Email** fields to appear.
   b. Click the button on the Form Designer toolbar.
   c. From the **Field Selection List** window, while holding down the Shift key, select the "Contact_Phone" and "Contact_Email" fields.
   d. Click **OK**.
   e. Click and drag the fields to the desired position.
   f. Click the button.

The fields will now appear on the calendar entry window *(Figure 21)*.

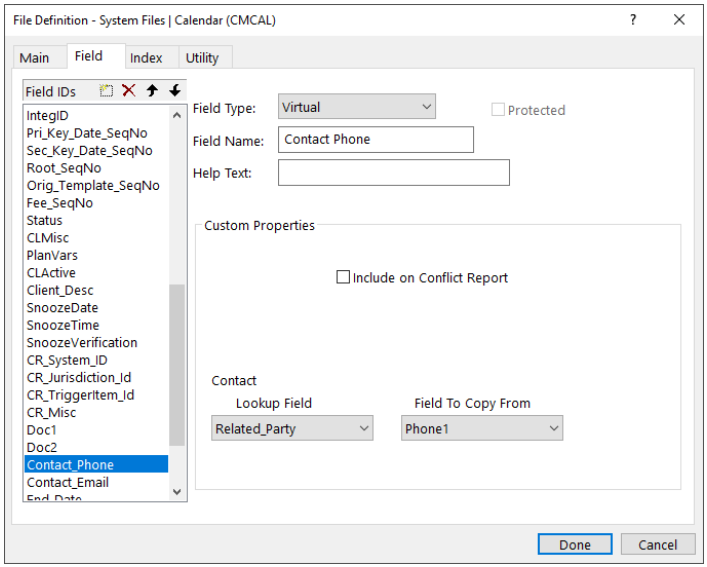


*Figure 20, Example of **Contact Phone #** Virtual field*

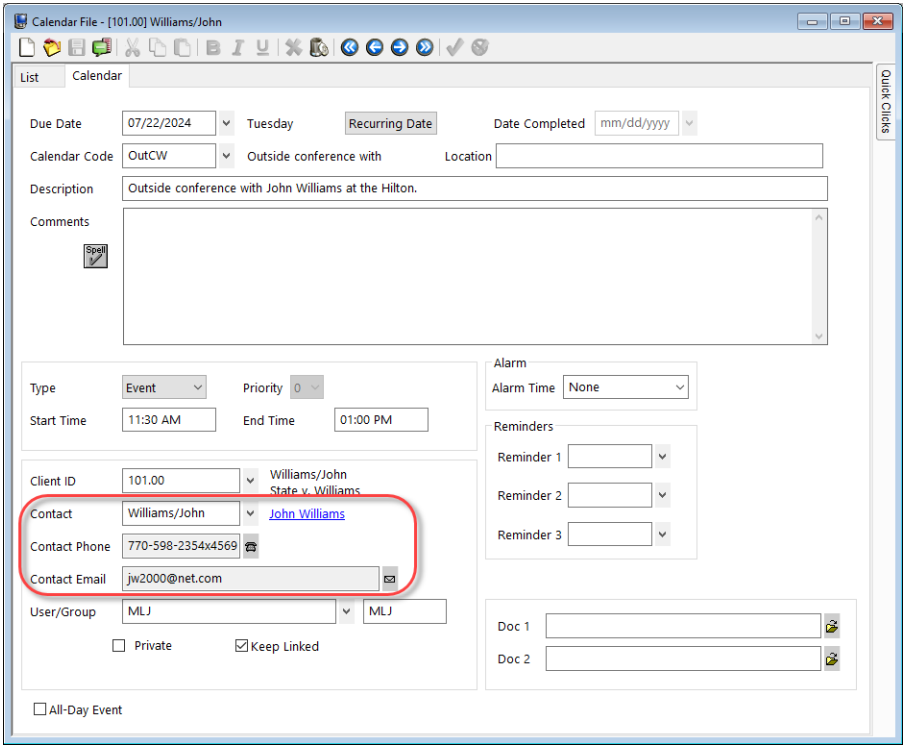


*Figure 21, Virtual fields added to **Calendar** file*

Considerations for Where to Store Data

With so many different types of files available for storing data, it is not always easy to determine which is the best option to use for the information you want to store. Below are some questions you can ask yourself to help determine which option is best suited for your purposes.

Can there be multiple instances of the data for a single matter?

If there is only one instance of the data, you can add the field to the Client File, the Contact File, or an Area of Practice file. But if there can be multiple instances, such as dependents for a client who is setting up a will, or medical providers for a personal injury case, this information must be stored in an Area of Practice File or a Common Client Related File.

Is the data used by a single Area of Practice?

If the data is used by a single Area of Practice, the data can be stored in the Client File or an Area of Practice File.

Is the data used by multiple Areas of Practice?

If the data is used by multiple areas of practice, the data can be stored in the Client File or a Common Client Related File.

Is the data already stored in another file?

If the data is already stored in another file, you can link to that information using a Lookup file such as the Contact file. You can also use Virtual fields to display fields from the file in which the data is stored.

Does the data pertain to a contact rather than a matter?

If the data is contact-specific rather than matter-specific, such as a contact's date of birth, the data can be stored in the Contact file.

Note: Keep in mind that there is a limit of 500 user-defined fields in a file in addition to protected fields. This limit typically is not encountered by most firms but should be kept in mind when determining where to add additional fields.

Examples

Determining the file in which to store data involves weighing the advantages and disadvantages of each option and determining which method is the most useful for your firm. The following includes examples of fields you might want to store in PracticeMaster, options for how to do so, and the thought process used to determine which method works best.

Example 1 - File Reference Number

Suppose all matters at your firm have a File Reference Number that is used to determine where the physical file containing matter information is stored. Each matter has a unique File Reference Number.

Option A
Client file

Because this information is not limited to clients belonging to a single Area of Practice, and each matter has a unique File Reference Number, you can simply add a field to the Client file to store this information *(Figure 22)*.

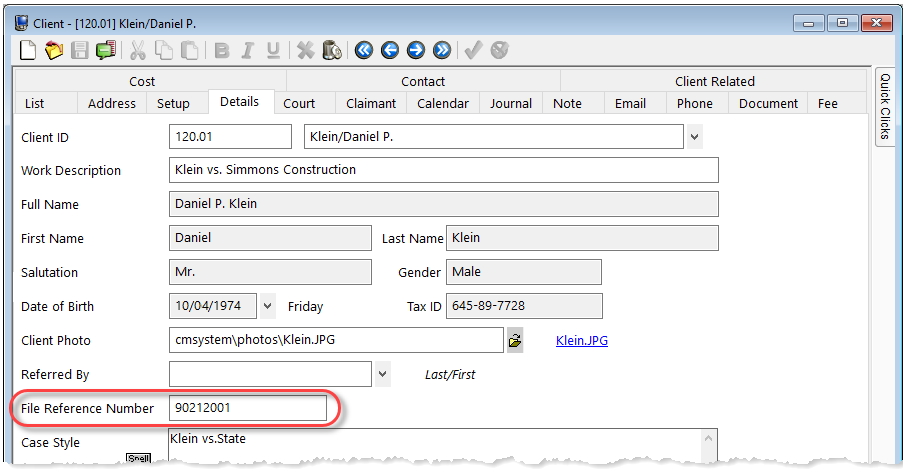


*Figure 22, Example of a **File Reference Number** field*

Example 2 - Children in a Family Law Matter

Suppose you have multiple matters in the Family Law Area of Practice that require you to store information about children. Each matter can have a different number of children.

Option A
Client file

You could add fields to the Client file to store information regarding children. However, because not all clients are Family Law Clients, information regarding children does not apply to all Areas of Practice. Furthermore, those clients who do belong to the Family Law Area of Practice may have multiple children. The number of fields you would need to add to the Client file to enter information for each child would depend on the number of children each client has, and that number could grow the next time a family law client retained your services. Therefore, this option is not practical.

Option B
Client Category page

This option allows information to appear in the Client file for Family Law clients only. However, fields would still need to be added to the Client file, which presents the same issues described in Option A. Therefore, this option is not practical.

Option C
Common Client Related file

Unlike Options A and B, a Common Client Related file would not require the creation of multiple fields in order to add records for multiple children. However, this option is not the best choice because records in a Common Client Related file are available to all clients regardless of Area of Practice.

Option D (Recommended)
Area of Practice file

Creating a "Children" Area of Practice file for the Family Law Area of Practice limits that information to only those clients belonging to the Family Law Area of Practice. Furthermore, the Area of Practice file allows you to create a separate record for each child. You can also add additional fields unique to this type of information, such as date of birth, birth certificate, citizenship, etc. Therefore, this option is the best option *(Figure 23)*.

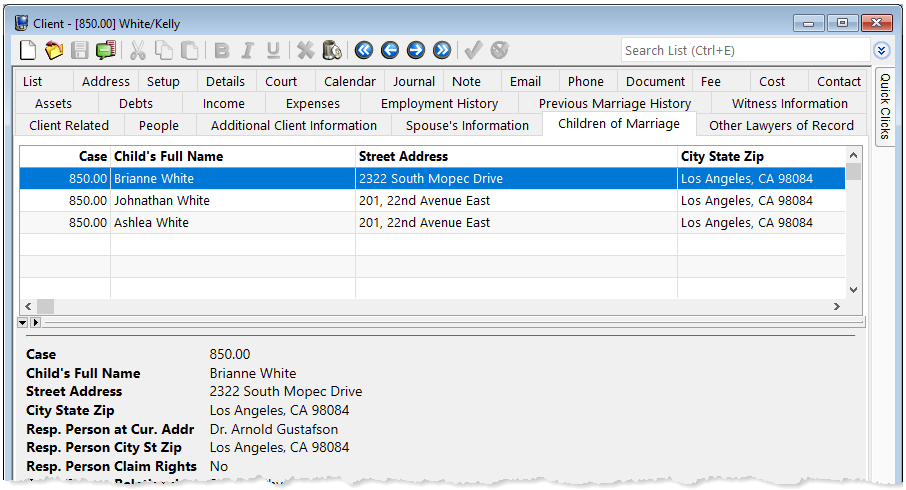


Figure 23, Example of a "Children" Area of Practice file

Example 3 - Related Contacts

Suppose you have several matters that require you to store contact information for multiple contacts. Each matter belongs to a different Area of Practice.

Option A
Client file

Adding this information directly to the Client file will work to store information for a single contact; however, you would need to add additional fields for each additional contact. Therefore, this option is not practical.

Option B ***(Recommended)***
Common Client Related file

A Common Client Related file allows you to link multiple contacts to a single client record. An individual record is created for each contact *(Figure 24)*. You can use virtual fields in the Common Client Related file to link to the pertinent information in the Contact file *(page 31)*.

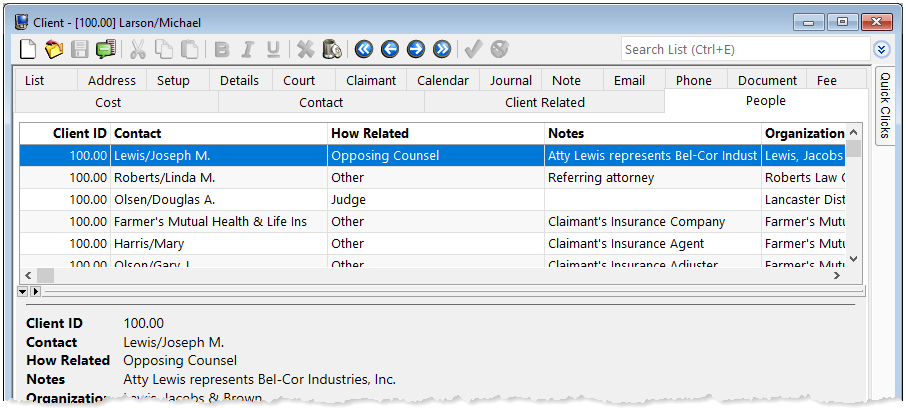


*Figure 24, Example of **Related Contacts** Common Client Related file*

Example 4 - Employment Info in a Workers' Compensation Matter

Suppose you have multiple matters in the Workers' Compensation Area of Practice in which you need to track employment information. There is only one employer in Workers' Compensation matters.

Option A
Client file

You could add fields to the Client file to store this information; however, you would not want these fields to be displayed for non-Workers' Compensation matters.

Option B ***(Recommended)***
Client Category Page

Creating an "Employment Info" Client Category page allows you to configure the fields you created in the Client file to appear only when a client belonging to the Workers' Compensation Area of Practice is selected *(Figure 25)*.

Option C ***(Alternative)***
Area of Practice File

As an alternative, you could store the employment information in an Area of Practice file. Some firms prefer to store this Area of Practice-specific information in the Area of Practice files. For example, larger firms with many different Areas of Practice may encounter the 450 user-defined field limit by adding the necessary fields to the Client file. Each file in PracticeMaster can have up to 450 user-defined fields in addition to the protected fields.

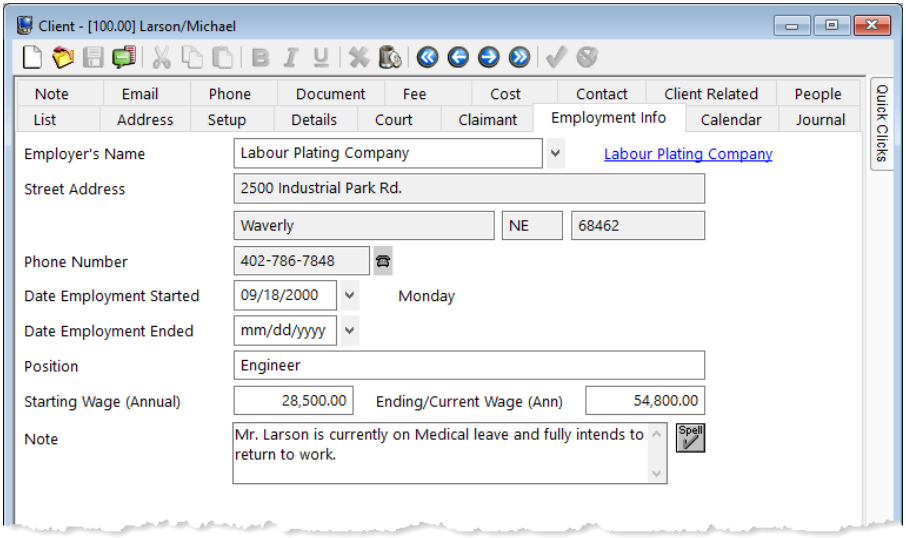


*Figure 25, Example of **Employment Info** Client Category page*

Example 5 - Case Status

Suppose you want all matters at your firm, regardless of Area of Practice, to have a Case Status field that is updated each time progress is made on the case.

Option A
Client file

You could create a field in the Client file to track the status of the case. For example, you could create an Alpha type field that uses a drop-down list to select from a list of predefined case statuses.

Option B
Lookup file

In some cases, a single field may not be able to contain the information you want to include regarding case status. Instead, you could create a lookup file that contains the fields you want, such as a generic 'Status' field and then a more in-depth 'Status Description' field *(Figure 26)*.

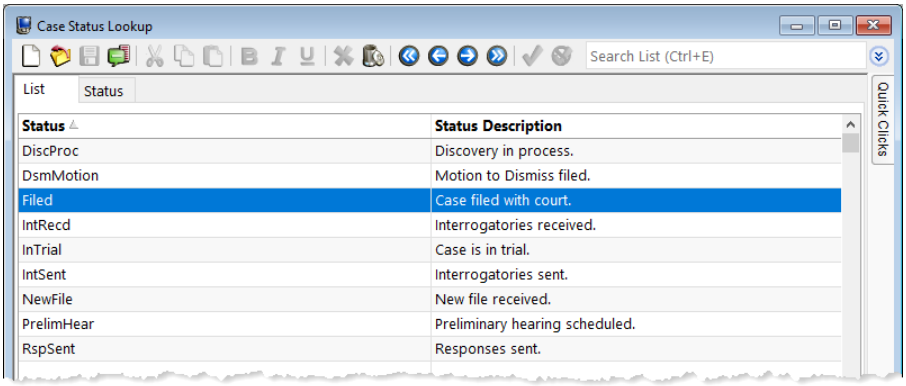


*Figure 26, Example of a **Case Status** Lookup file*

Areas of Practice

PracticeMaster categorizes your clients by Area of Practice. You can use the Areas of Practice provided with PracticeMaster, modify those Areas of Practice, or create your own Areas of Practice from scratch. We recommend installing the Area of Practice templates provided with PracticeMaster *(page 43)*.

Using Predefined Area of Practice Templates

Several predefined Area of Practice templates are provided with PracticeMaster. An Area of Practice Template consists of predefined file definitions for an Area of Practice and may include samples of precoded documents and reports unique to each Area of Practice. All file definitions, documents, and reports provided with each Area of Practice Template can be modified.

Areas of Practice are installed with the PracticeMaster Trial Software with Sample Data. Areas of Practice are ***not*** installed in the Trial Software, with full-user versions, or with Starter Data. However, Areas of Practice can easily be installed by importing Area of Practice templates. Area of Practice templates provided with PracticeMaster are shown to the right.

Area of Practice Template	Base Name
Personal Injury (Plaintiff)	PI
Probate	PROBATE
Foreclosure	FORECLOS
Business Law	BUSLAW
Family Law	FAMILY
Wills & Trust	WILLS
Criminal Law	CRIMLAW
Real Estate	REALEST
Workers' Compensation	WC
Administrative	ADMIN
Continuing Education	CONT_ED

Installing Areas of Practice

If you want to use the Area of Practice templates provided with PracticeMaster, they must be installed using the Import Area of Practice Template utility. Area of Practice templates can be downloaded from our website. Knowledge Base Article **R11568** provides instructions on downloading and installing Areas of Practice. Additional information regarding Area of Practice Templates can be found in Knowledge Base Article **R11568**, "Predefined PracticeMaster Area of Practice Templates."

WorkFlows

A WorkFlow is a set of actions that occur when certain conditions are met, such as when a particular type of record is added or changed. WorkFlows are a powerful feature that can save you time by automating common tasks.

Here are some examples of procedures that can be automated using WorkFlows:

- A Fee Agreement is generated when a new matter is saved.
- When a fee is saved with over 8 hours, a WorkFlow notifies both the user and the Administrator of the error.
- When a Calendar record is deleted, a WorkFlow creates a Journal record with the calendar entry's **Description**, **Comments**, **User/Group** information, and **Due Date**. The user that deleted the calendar entry is also prompted to enter an explanation as to why the record is being deleted.

A single WorkFlow can perform up to 10 steps, or actions, including functions such as creating records, changing existing records, starting emails, sending eNotes, and more.

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

- Knowledge Base Article **R11307** - "All About WorkFlows"
- Knowledge Base Article **R11487** - "Working with Indexes, Filters, and QuickViews"

Part 2 - Day-to-Day Features

Part 2 of the ***Customizing PracticeMaster Guide*** is designed to introduce those features that will be accessed by the majority of users on a day-to-day basis. You can customize some features in PracticeMaster for the entire firm. PracticeMaster allows individual users to customize other features to meet their specific requirements.

The content covered in this section includes:

- The **Quick Clicks** pane and how it can be used to customize the way you view data on the **List** tab and in the Matter Manager
- How to customize the PracticeMaster calendar to display information in a way best suited to each user
- An introduction of Outlook integration
- The Conflict of Interest utility and how you can customize what data is searched and presented during conflict checks
- How to convert records to fees
- How the **Task Folders** can simplify the task of navigating the software
- Additional items that can be customized to suit user preferences

Quick Clicks

The following subjects will be covered in the Quick Clicks section:

- **Introduction to Quick Clicks**
- **Manage Quick Clicks**
- **List Preferences**
- **Column Layouts**
- **Filtering Data**
- **Sort Order**
- **QuickViews and Smart tabs**

Introduction to Quick Clicks

The Quick Clicks pane provides an easy way to access and organize data files in PracticeMaster. This pane provides single-click access to a variety of features that will help you navigate your data files. These features are organized in groups that are customizable on a per-user basis. The Matter Manager, which is used to quickly view relevant information for a matter, also includes the Quick Clicks pane.

By default, the Quick Clicks pane is docked on the right side of the Editor window. However, it can also be docked on the left side of the Editor window. This is accomplished by clicking on the Quick Clicks pane title bar and dragging it to the desired position.

The Quick Clicks pane features an Auto Hide mode, which hides the pane from view until it is needed. This is indicated by a pushpin icon. When the pushpin is displayed vertically, this indicates that Auto Hide mode is disabled, and the Quick Clicks pane is "pinned" to the Editor window. When the pushpin is displayed horizontally, this indicates that Auto Hide mode is enabled, and moving the mouse away from the Quick Clicks pane will cause it to slide out of view. Moving your mouse over the **Quick Clicks** button will bring the pane back into view.

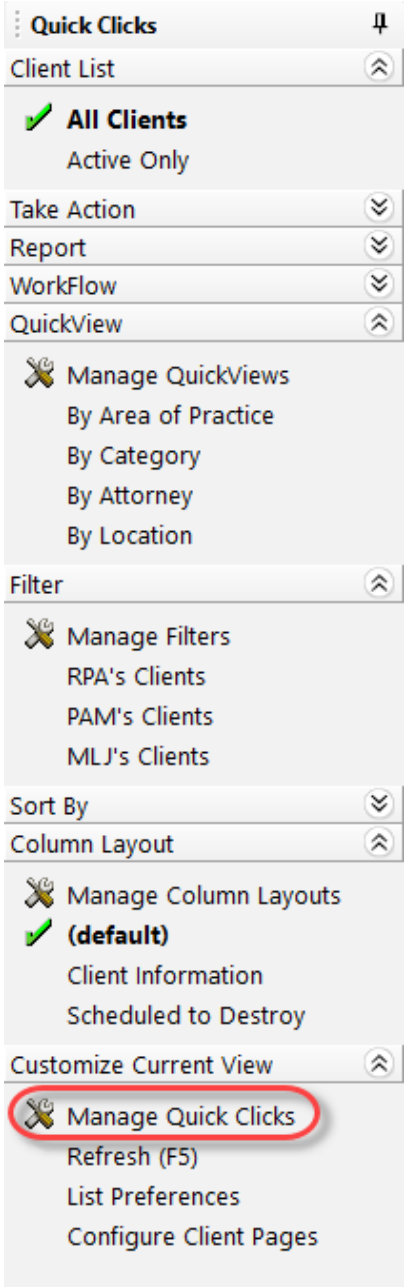


Figure 27, Quick Clicks pane for the Client file

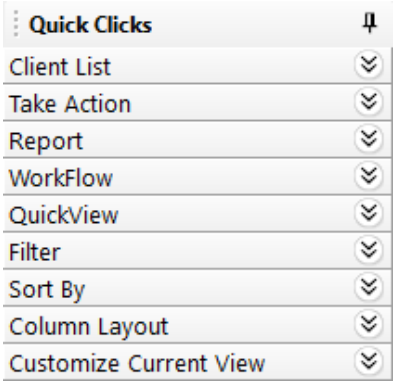


*Figure 28, "Pinned" Quick Clicks pane (**Auto Hide** disabled)*

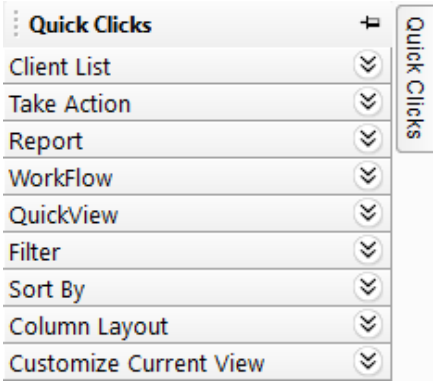


*Figure 29, "Unpinned" Quick Clicks pane (**Auto Hide** enabled)*

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**.

Using Quick Clicks

Manage Quick Clicks

The Quick Clicks pane can be customized by each user using the Manage Quick Clicks window.

The **Manage Quick Clicks** window provides customization for each of the Quick Clicks groups all in one window *(Figure 30 and Figure 31)*. You can access this window by selecting **Manage Quick Clicks** under the **Customize Current View** group of the Quick Clicks pane. This window allows you to add, copy, edit, and delete items in your groups; provides control over which groups, folders, and items are available in the Quick Clicks pane; and determines the order in which they will be displayed.

Note: The **Manage Quick Clicks** window can also be opened by clicking any of the "Manage" options found in each Quick Clicks group.

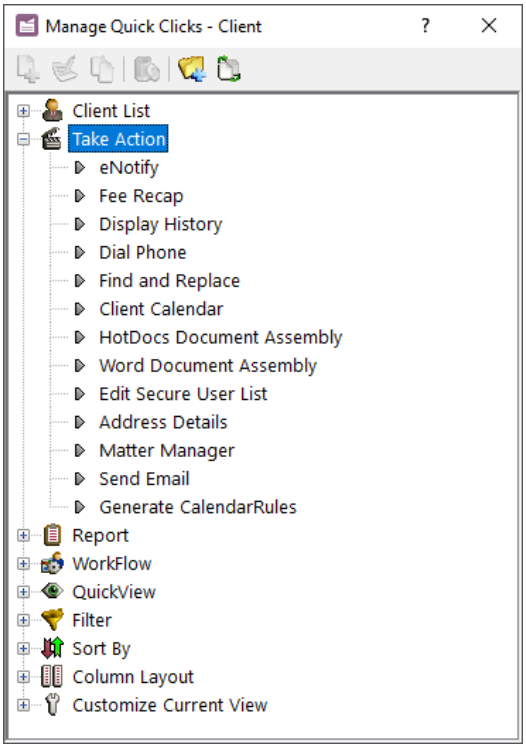


*Figure 30, **Manage Quick Clicks** window for the **Client** file*

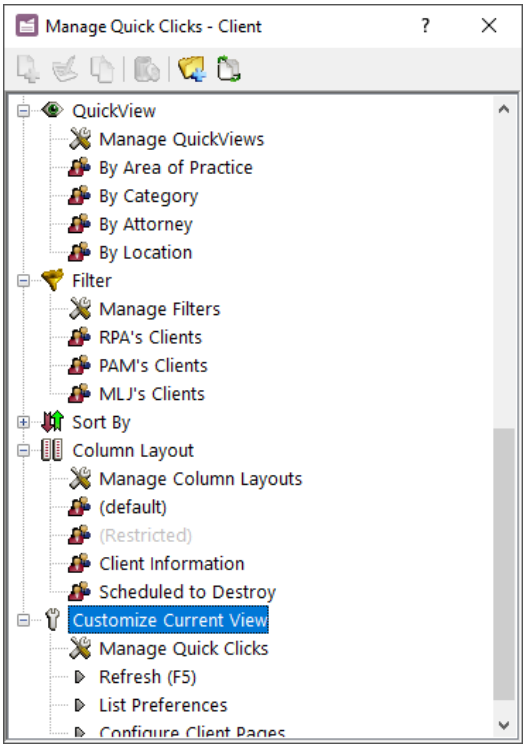


*Figure 31, Additional **Client** file **Manage Quick Clicks** options*

The toolbar buttons and right-click menus can be used to access the various tasks in the Manage Quick Clicks window.

List Preferences

Menu: *Edit | List | List Preferences*
Quick Clicks: *Customize Current View | List Preferences*

List Preferences are used to determine the visual settings for the rows displayed on the **List** tab of Editor windows for PracticeMaster files *(Figure 32)*. You can use the List Preferences window to specify row height and color. List preferences are edited on a per-user, per-file basis. In other words, user Cathy can maintain her own set of list preferences separate from user Jim. Cathy can also have a different set of list preferences in the Client file than she does in the Fee file.

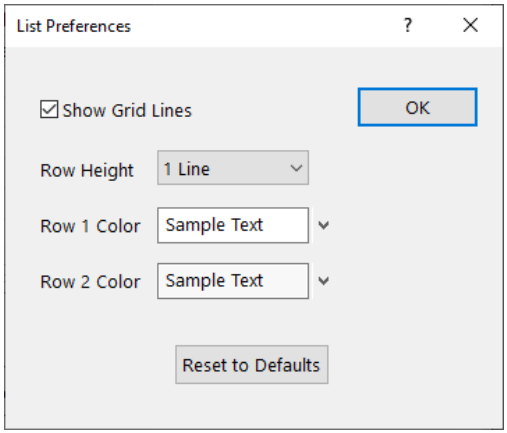


Figure 32, List Preferences window

Preferences for the List Tab

List preferences for PracticeMaster file lists can be customized as follows.

Show Grid Lines

When this option is selected, horizontal rows and vertical columns will be separated by grid lines. When this option is cleared, there will be no separator between cells.

Row Height

This field determines the height of each row and how text will wrap. The default value is 1 line; this can be changed to up to 4 lines.

Row 1/Row 2 Color

These fields allow you to use color for visual separation of each row. Clicking the drop-down arrow will open a **Select Colors** window from which you can choose the desired text color and background color. PracticeMaster assigns default color settings for each file. For example, the Fee file uses alternating blue and white rows.

In the following figures, the Fee file has been customized to use different numbers of lines, different colors, and different grid line settings. As you can see, the List Preferences offer a great deal of flexibility for optimizing the appearance of your data.

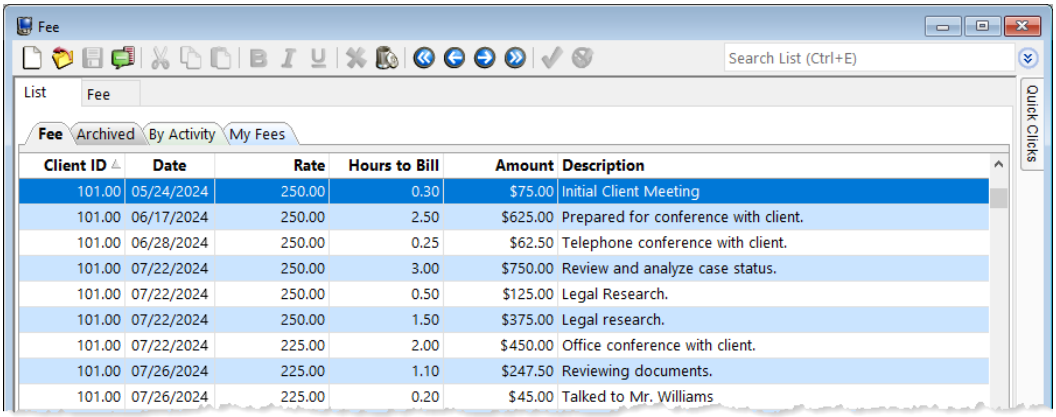


Figure 33, List Preferences with 1 row per record and grid lines

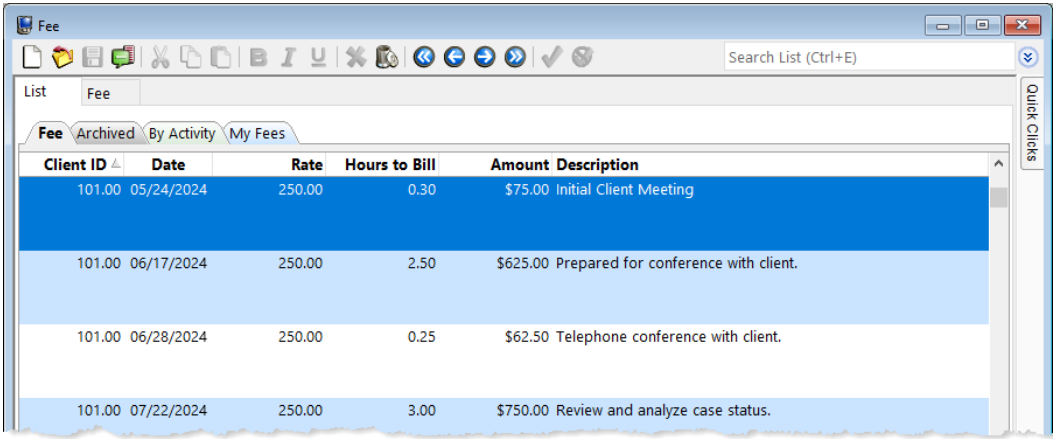


Figure 34, List Preferences with 3 rows per record and no grid lines

List Preferences for PracticeMaster Matter Manager

Menu: ***(From Matter Manager) Edit | List | List Preferences***
Quick Clicks: ***(From Matter Manager) Customize Current View (List Preferences)***

The Matter Manager window displays matter-specific information in one easy-to-navigate window *(Figure 35)*. Like the PracticeMaster files, the record list can be customized.

However, list preferences for the Matter Manager differ slightly from the preferences you can specify for PracticeMaster files. The **Row 1/Row 2 Color** and **Show Grid Lines** options are the same; however, there is an additional option for displaying records based on record type *(Figure 36)*.

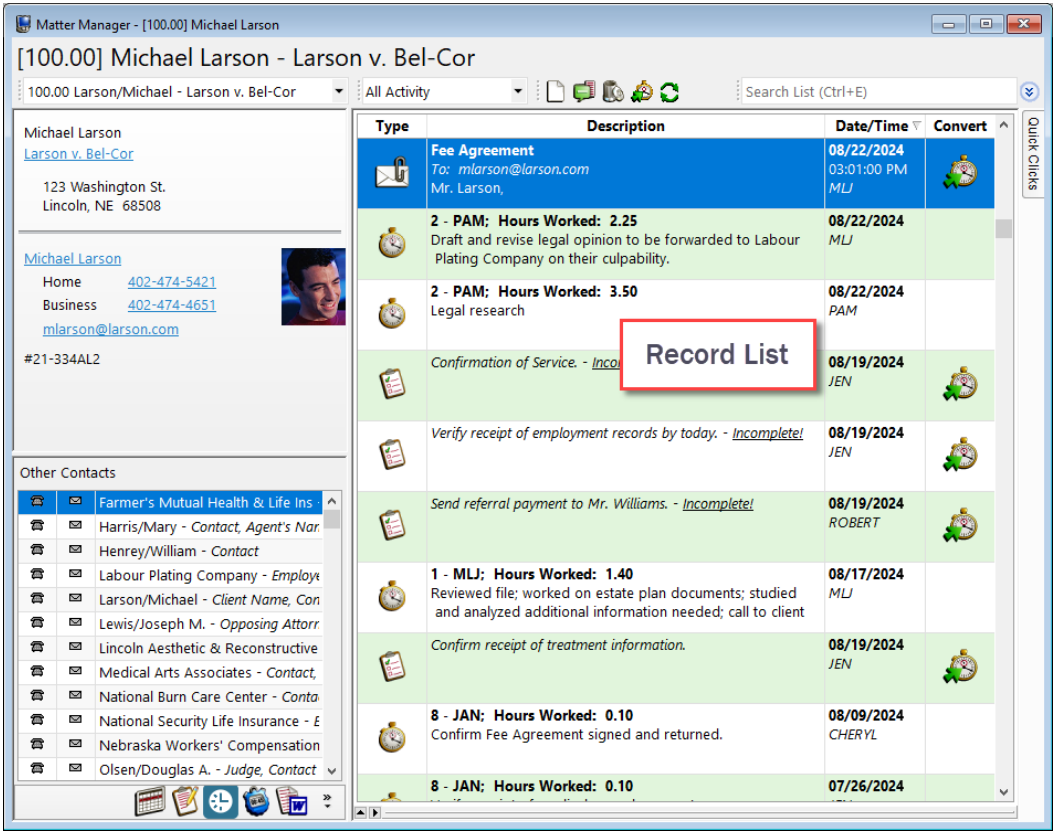


Figure 35, Matter Manager

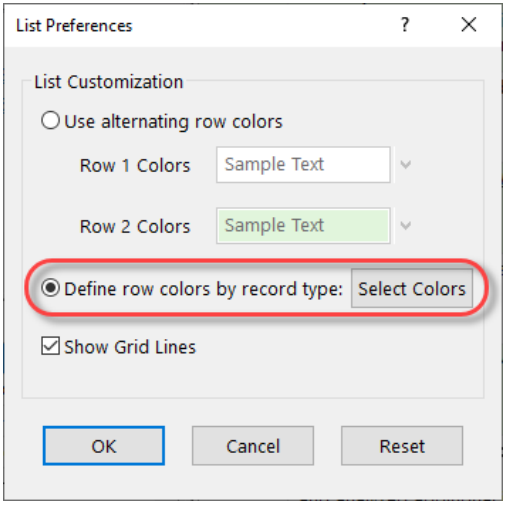


Figure 36, List Preferences window for Matter Manager

Define row colors by record type

When this option is selected, you can use the **Select Colors** button to open the Record Colors window and define the text and background color for each record type *(Figure 37)*. For example, when displaying the **All Activity** view, you can show fees in one color and journal records in another color *(Figure 38)*.

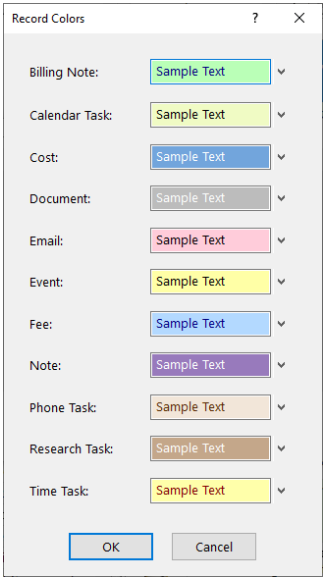


Figure 37, Sample Record Colors for Matter Manager List Preferences

Figure 38, Matter Manager with custom Record Colors

Column Layouts

A column layout is used to determine the columns that are shown in an Editor window for a file as well as the order of the columns. Column layouts are selected on the Quick Clicks pane when viewing the **List** tab of the Editor window.

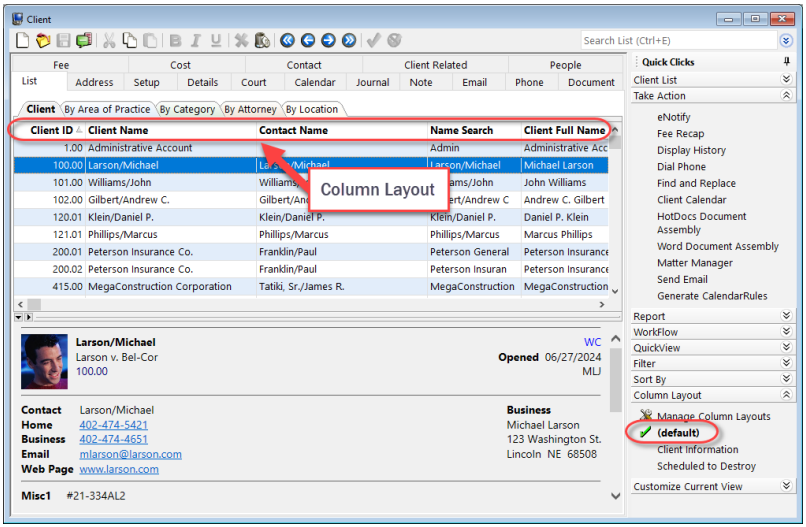


Figure 39, Column Layout

Each column in a column layout represents a field in a file. Column layouts are created and edited via the Column Layout Editor *(Figure 40)*. You can access the Column Layout Editor by clicking on the **Manage Column Layouts** option in the **Column Layout** group of the Quick Clicks pane *(Figure 41)*.

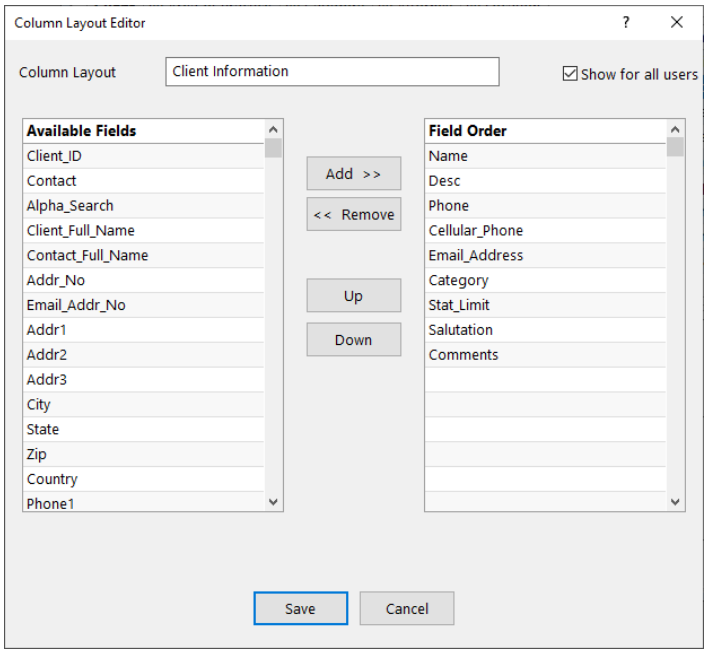


Figure 40, Column Layout Editor

▶ To create a column layout

1. Open the file for which you want to create a column layout.
2. In the Quick Clicks pane,in the **Column Layout** group, select **Manage Column Layouts**.
3. Click the icon. The Column Layout Editor window will be displayed.
4. Enter a name for the column layout in the **Column Layout Name** field.
   a. Optionally select the **Show for all users** check box. This check box determines whether the column layout will be available for all users or just the user creating the column layout.
   b. From the **Available Fields** column, select the field you want to display in the column layout and click **Add >>**. *(Note: Alternatively, double-click a field to add it.)*
   c. Use the **Up** and **Down** buttons to change the order of the fields appearing in the column layout. The order of the fields determines the order of the columns.
5. When you have finished adding fields to the column layout, click **Save**.
6. If desired, you can drag and drop the column layout to a different position in the list.

After closing the **Manage Quick Clicks** window, you will see your column layout in the list of available column layouts in the **Quick Clicks** pane. Selecting the column layout will apply the column layout. The currently selected column layout is indicated by a green check mark ( ).

Tip: When creating column layouts, consider the fields you search most often when looking up information. These are also the fields that will be searched by default when filtering records using the Search box *(page 59)*.

The Default Column Layout

The **Default** column layout is shown as **(default)** in the Quick Clicks pane. The **Default** column layout includes all fields in a file. The fields are positioned in the order they are used in File Maintenance. The **Default** column layout cannot be edited or deleted.

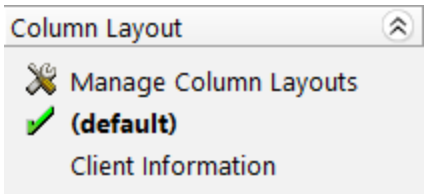


Figure 41, Quick Clicks Column Layout group

The Restricted Column Layout

The **Restricted** column layout is a special column layout that is used to prevent users without access rights for certain information from seeing that information as part of another column layout. For example, perhaps you have a user who has browse calendar rights but has no rights to the Client file. When the user selects the client lookup button, only the Client ID, Client Name, and Name Search fields will be shown because those are the fields in the **Restricted** column layout for the Client file. If desired, you can add or change fields in the **Restricted** column layout. You cannot delete the **Restricted** column layout. A list of the default fields for each file can be seen in Help. The fields listed in Help will be used if the Restricted column layout's list of fields is blank.

Filtering Data

PracticeMaster provides powerful tools for filtering data. Filtering makes it easy to find the records you want to see by eliminating records that do not meet the specified criteria. There are several ways to filter records.

Search Box

The easiest way to filter data in a **List** tab is to use the Search box, which is displayed in the upper-right corner of a file's Editor window.

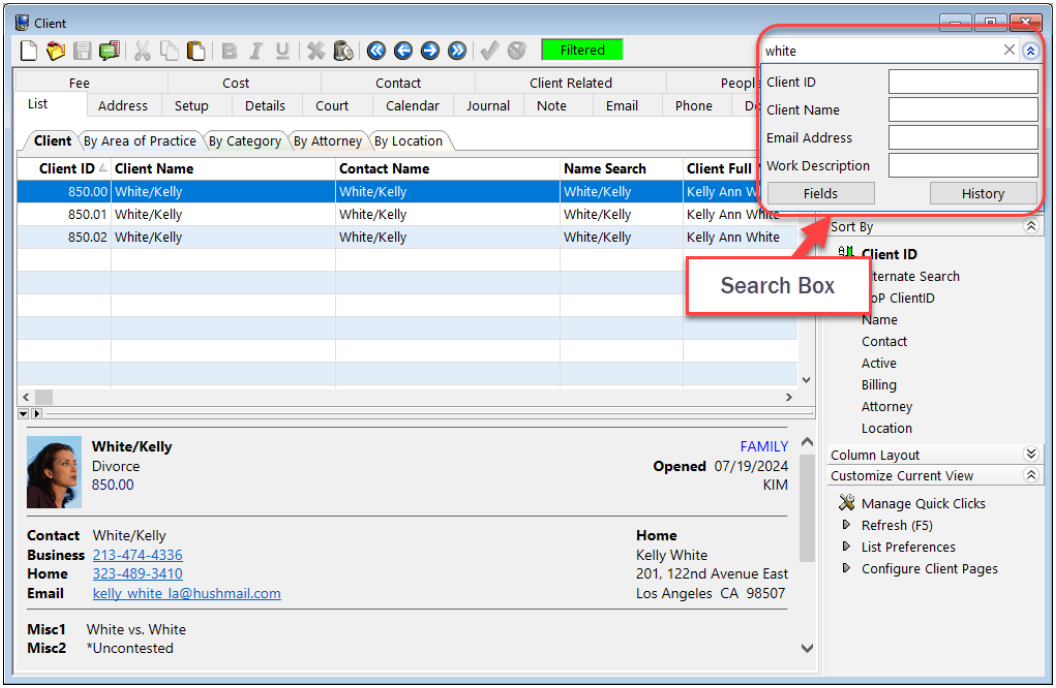


Figure 42, Search box

The Search box can search either all fields displayed in a column layout or search only a specific field.

- To search all fields displayed in a column layout, enter your search term in the **Search List** field.
- To search a specific field, click the button and enter your search term in the labeled field.

In Figure 42 above, the Client list has been filtered to show only clients with the text "White" appearing somewhere in the column layout.

You can also perform searches for information located in fields that are not part of the current column layout. To do this, you must manually enter the Field ID in the Search box along with the term you want to search. For example, to search the Work Description field when the Work Description is not part of the column layout, enter "Desc:" (without the quotation marks) before the text you want to search for *(Figure 43)*.

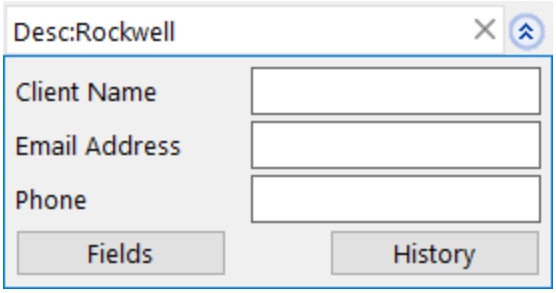


Figure 43, Example of a search for a field that is not part of the column layout

Tip: More information on the Search box can be found in the ***PracticeMaster Search Guide***.

Predefined Filters

There are special filters built into PracticeMaster to make your searches easier. For example, a special List Group is available in the Quick Clicks pane of the Client, Contact, and Timekeeper files. Filters that show all records or only those records that are active are included in this group.

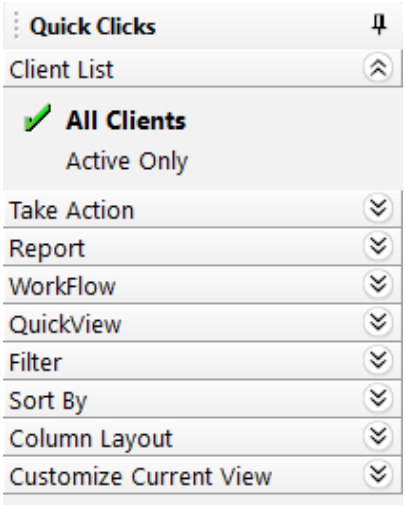


Figure 44, Predefined Client List filters

Custom Filters

You can create and save custom filters using the Filter Editor. This powerful utility allows you to create simple or complex filters based on your needs. Figure 45 shows an example of a filter that displays only clients with a value of "Omaha" in the **Location** field.

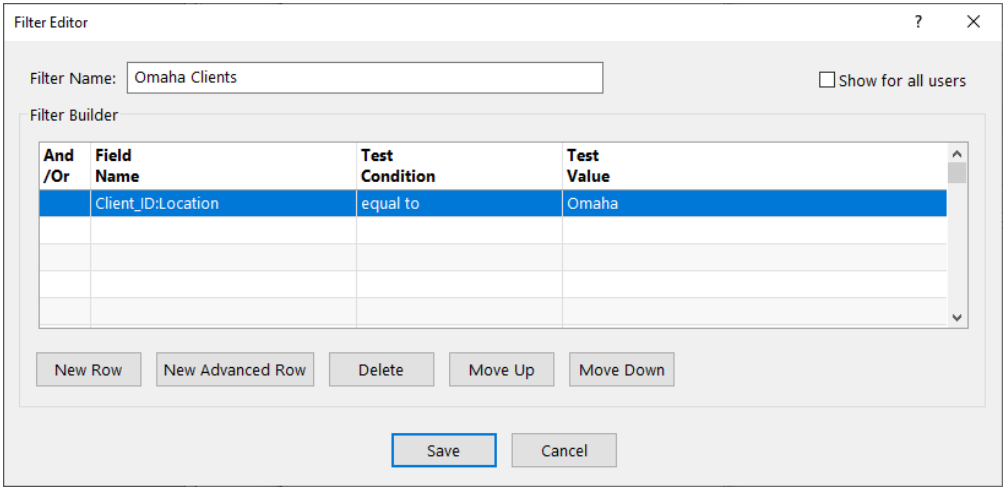


Figure 45, Filter Editor window

▶ To create a new filter

1. From the **Quick Clicks** pane, under the **Filter** group, select **Manage Filters**.
2. Click the icon.
3. Enter the **Filter Name** by typing over the default text of "New Filter".
4. Optionally select the **Show for all users** check box to share the filter with all users.
5. Click the **New Row** button.
   a. Select the desired field from the list.
   b. Select the **Test Condition** field and select the desired value.
   c. Select the **Test Value** field and enter the desired value.
6. Optionally, click **New Row** and repeat step 5 to add additional conditions to your expression.
7. Click **Save**.
8. You can drag and drop the filter to a different position in the list in the **Manage**

Quick Clicks window.

9. Close the **Manage Quick Clicks** window.

Once you have created your filter and closed the Manage Quick Clicks window, it will be available for selection in the Quick Clicks pane.

Optimizing Filters with Indexes

You can significantly improve filtering time by creating filters that take advantage of indexes. Indexes are a list of all records in a file that are sorted by a specific field you have chosen. More information on indexes can be found on page 12. Knowledge Base Article **R11487**, "Working with Indexes, Filters, and QuickViews," provides additional information on the criteria required in order to use an index when filtering.

More Info: Additional information on expressions and filters can be found in the PracticeMaster Help and in the following Knowledge Base articles at **support.Tabs3.com**:

- Knowledge Base Article **R11493** - "All About Expressions".
- Knowledge Base Article **R11515** - "Filter Expression Examples".

Sort Order

There are two ways to sort the information that appears on the **List** tab. The first is by selecting one of the indexes listed in the **Sort By** group of the Quick Clicks pane *(Figure 46)*.

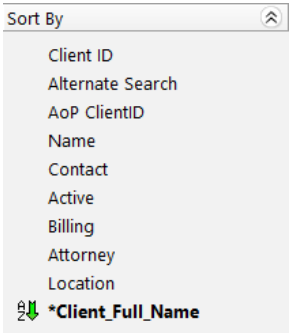


Figure 46, Quick Clicks Sort By group

The second way to sort records on the **List** tab is by using the column headers that appear above the record list. Clicking a column header for which no index is defined in the **Sort By** group will create a temporary index. Temporary indexes are displayed in the **Sort By** group with an asterisk in front of the field name. The field being sorted on will display an ascending sort indicator ( ) in the column header. Clicking again will change the sort to display in descending order ( ).

Figure 46 shows a temporary index on the **Full Name** field in the Client file. This index sorts clients in alphabetical order based on the value entered in the **Full Name** field, as shown in Figure 47.

If you find that you are often sorting on a field that creates a temporary index, you will probably want to create a permanent index for that field. Step-by-step instructions on creating a new index can be found on page 12. Knowledge Base Article **R11487**, "Working with Indexes, Filters, and QuickViews," also provides detailed information regarding temporary and permanent indexes.

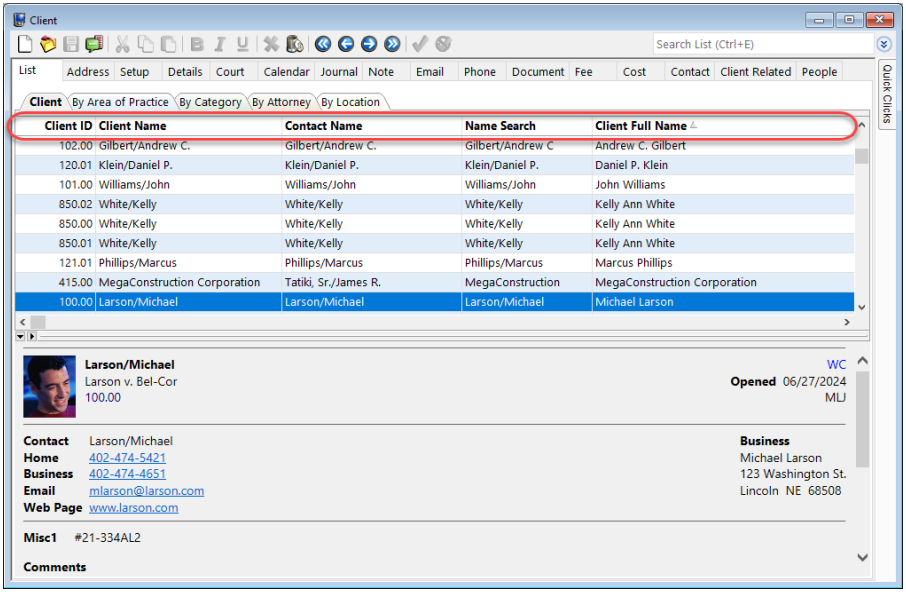


Figure 47, Client File sorted by Full Name

QuickViews and Smart tabs

QuickViews are a powerful feature in PracticeMaster. QuickViews combine a filter, column layout, and sort option into a single tab at the top of the **List** tab.

QuickViews can also include Smart tabs at the bottom of the **List** tab. Smart tabs further sort records into groups based on the selected indexed field.

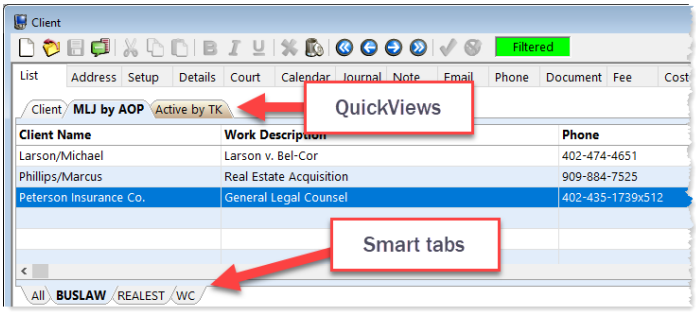


Figure 48, Client Editor with QuickView enabled

In Figure 48, the "MLJ by AOP" QuickView is selected. This QuickView is designed to show all of attorney MLJ's clients by Area of Practice. Additionally, the BUSLAW Smart tab is selected, thus showing only MLJ's Business Law matters.

The QuickView Editor is used to create a QuickView *(Figure 49)*.

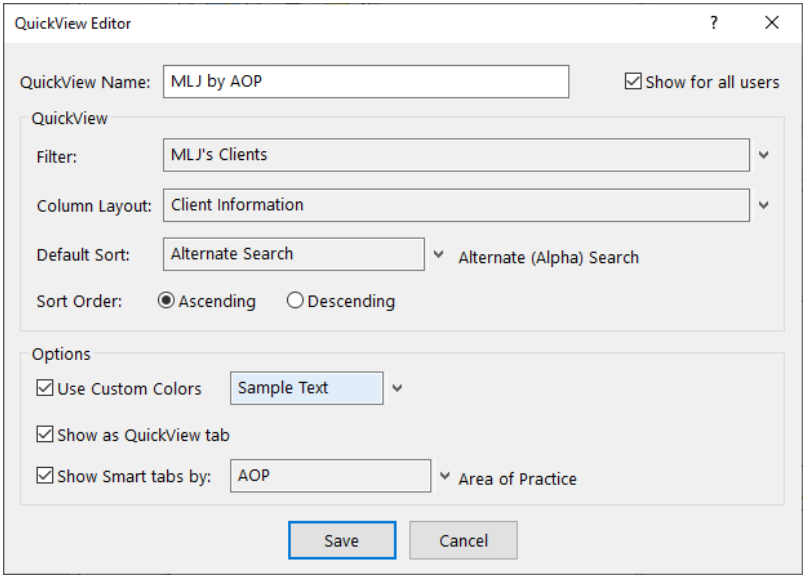


Figure 49, QuickView Editor

▶ To create a new QuickView

1. From the **Quick Clicks** pane, under the **QuickViews** group, select **Manage QuickViews**.
2. Click to add a new QuickView.
   a. Enter the **QuickView Name** by typing over the default text of "New QuickView".
   b. Optionally select the **Show for all users** check box to share the QuickView with all users.
   c. Select a **Filter**, **Column Layout**, and **Default Sort** for this QuickView. *(Tip: You can select a Filter and a Column Layout before creating your new QuickView to automate your selection process.)*
   d. Optionally select to **Use Custom Colors** and choose the desired color scheme. This will set the color of the QuickView tab and Smart tabs.
   e. Optionally select to **Show as QuickView tab**. If selected, the tab will always be included at the top of the List window. If cleared, the QuickView will appear in the Quick Clicks, but will only show a QuickView tab while active.

   f. Optionally select to **Show Smart tabs** and choose which indexed field to use for these tabs. Smart tabs show filtered results based on the specifed field.

3. Click **Save** to save the QuickView.
4. You can drag and drop the QuickView to a different position on the list.
5. Close the Manage Quick Clicks window.

QuickViews are user-specific and can be configured to show for all users if desired.

Tip: We strongly recommend you take some time to explore QuickViews. The time spent learning and implementing QuickViews can save you and others in your firm a great deal of time by optimizing your lookup windows, thus allowing you to quickly find the information you need.

More Info: Additional information on QuickViews can be found in PracticeMaster Help and in the following Knowledge Base articles at **support.Tabs3.com**.
- Knowledge Base Article **R11607** - QuickViews Included in PracticeMaster
- Knowledge Base Article **R11487** - Working with Indexes, Filters, and QuickViews

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**.

Using Quick Clicks

Calendar

Calendaring is a critical function in every law office because it allows members of the staff to quickly locate other members of the office while also keeping track of their own schedules and client deadlines. Many firms assign one or more employees the task of scheduling tasks, appointments, and other events on behalf of other members of the firm.

The following section will cover basic information about the Graphical Calendar as well as the process of configuring calendar rights, calendar properties, and Calendar Plan Templates. Information on synchronization with Microsoft Outlook can be found in the ***Outlook Integration Guide***.

Calendar Window

The Calendar window allows you to display calendar records in a daily, weekly or monthly calendar format. Figure 50 displays the Daily Calendar. The Calendar window includes a toolbar as well as three areas including the Event Calendar, Date Selector, and the Task List.

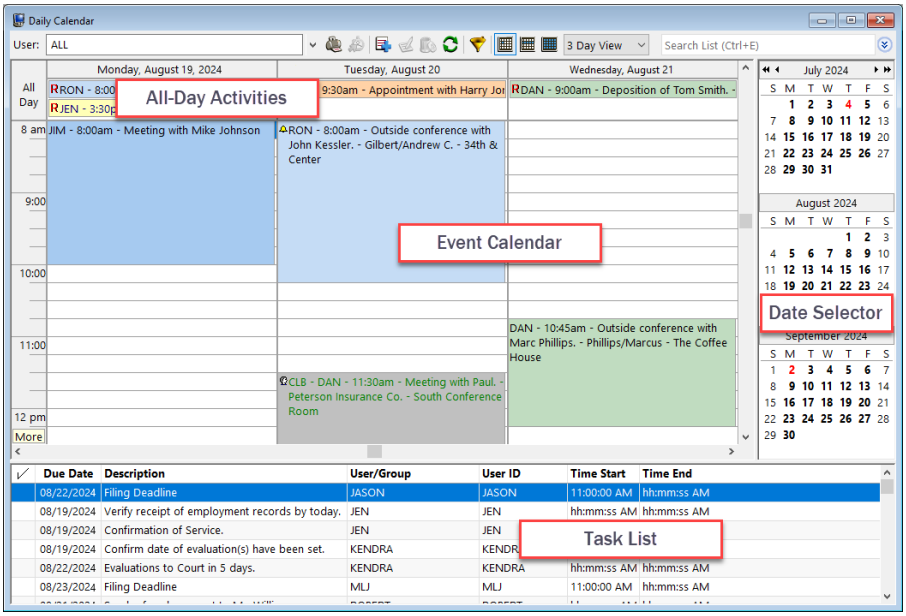


Figure 50, Daily Calendar

Calendar Rights

Menu: ***File | Open | Users | Calendar Rights***

By default, any user can view other users' public calendar entries, but rights must be explicitly given to edit other users' public entries, view private entries, and edit private entries. Users are granted access rights to edit public and private calendars for other users in the **User Configuration** window of the System Configuration application. A Manager can access this window to grant rights to allow a user to edit other users' calendars and vice versa. Additionally, users can grant rights to their calendar entries provided they belong to an access profile that allows access to the **User Configuration** window.

The following figures display both the **Rights to This Calendar** and the **Rights to Other Calendars** tabs for user Cathy. The check marks on each list represent which users have the right to browse and/or edit her public and private calendar entries *(Figure 51)* and whether she can browse and/or edit other users' calendar entries *(Figure 52)*.

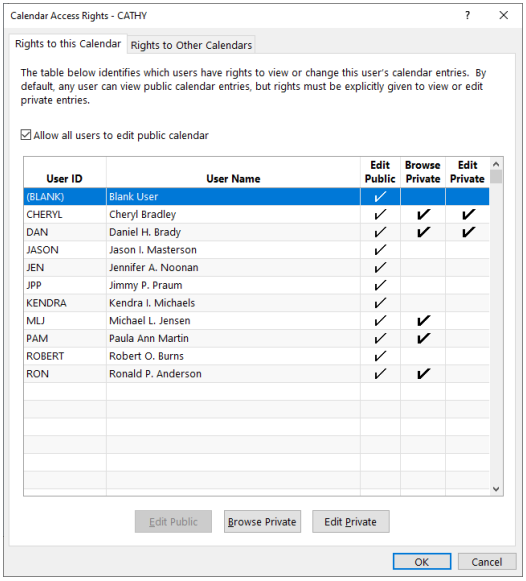


Figure 51, Calendar Access Rights - ***Rights to This Calendar*** *tab*

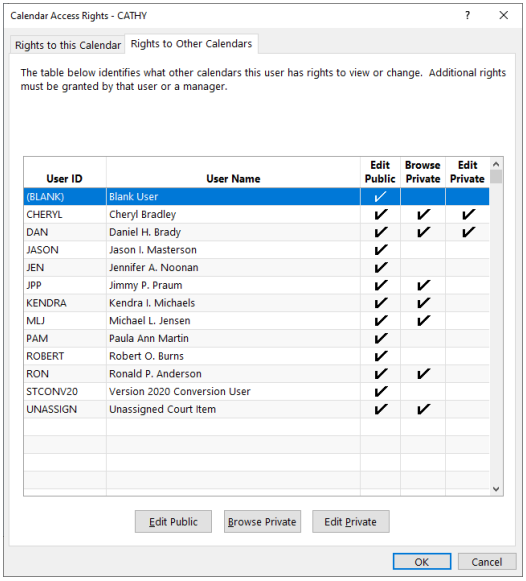


Figure 52, Calendar Access Rights - ***Rights to Other Calendars*** *tab*

More Info: Additional information regarding access rights and step-by-step procedures for modifying calendar rights can be found in the ***Administrator Guide*** and System Configuration Help.

Calendar Properties

Menu: ***Calendar | Calendar Properties***
Home: ***All Actions | Calendar | Calendar Properties***
Quick Launch: ***Calendar Properties***

The Calendar Properties window allows each user to configure what information will be shown in the Graphical Calendars and how it will be displayed. For example, each user can specify how the colors of the events will be displayed on the Graphical Calendars as well as the number of minutes between refreshes.

The Calendar Properties window is divided into six tabs: **General**, **Daily**, **Weekly**, **Monthly**, **Task List**, and **Time Zone**. Each tab corresponds to the section of the calendar being customized.

The majority of the options in the Calendar Properties window are self-explanatory. This section will discuss those items that are not self-explanatory in more detail.

More Info: Detailed information on each field in the Calendar Properties window can be found in PracticeMaster Help.

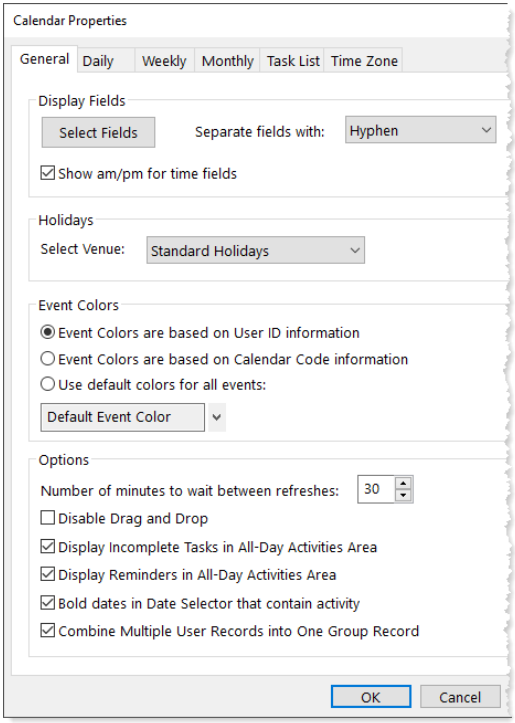


*Figure 53, Calendar Properties - **General** tab*

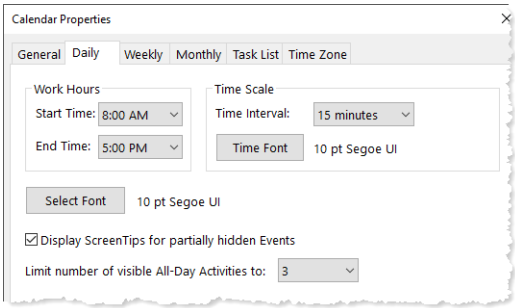


*Figure 54, Calendar Properties - **Daily** tab*

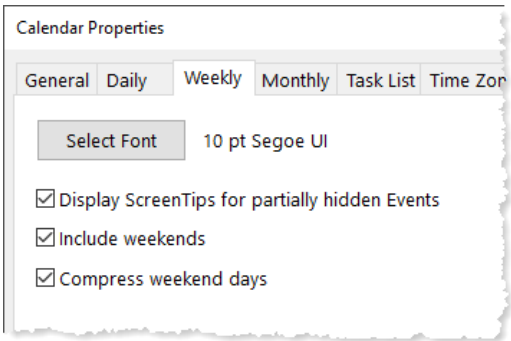


*Figure 55, Calendar Properties - **Weekly** tab*

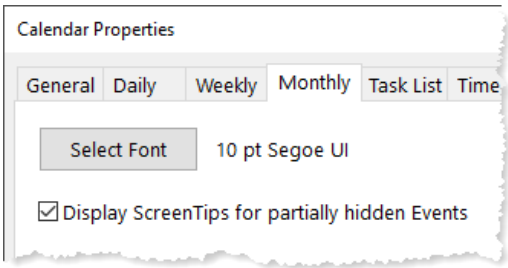


*Figure 56, Calendar Properties - **Monthly** tab*

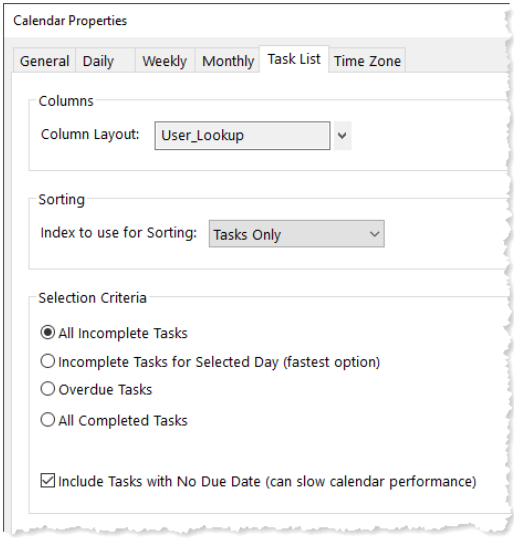


*Figure 57, Calendar Properties - **Task List** tab*

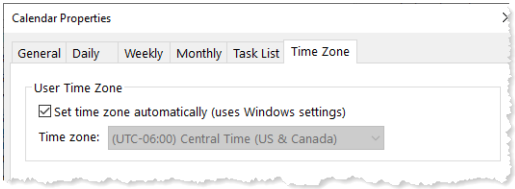


*Figure 58, Calendar Properties - **Time Zone** tab*

General Tab

The **General** tab *(Figure 53)* allows you to specify various settings for all Calendar windows (i.e., Daily Calendar, Weekly Calendar, Monthly Calendar, and Task List window).

Display Fields

The **Display Fields** section is used to select which fields will display on the Event Calendar of the Calendar window and the Graphical Calendar Report. You can designate whether you want am/pm shown and which separator to use between the displayed fields. Clicking the **Select Fields** button will open a **Select Display Fields** window *(Figure 60)*, allowing you to designate which fields will be displayed.

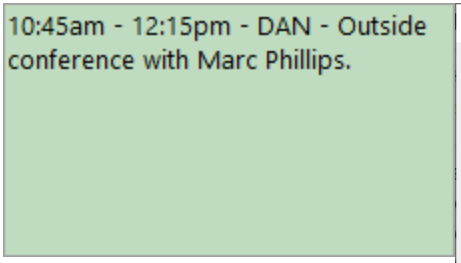


Figure 59, Example of a Calendar Entry using Display Fields from Figure 60

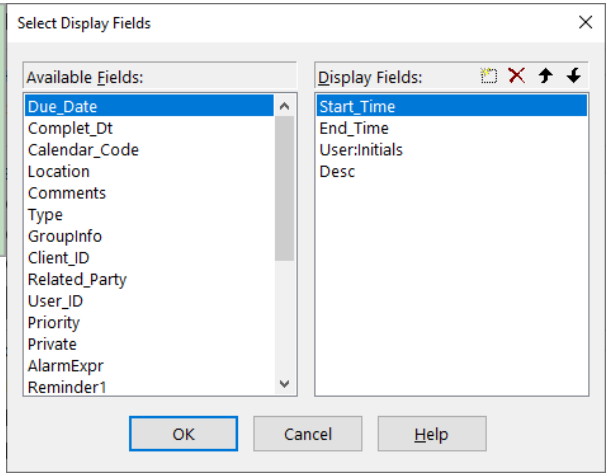


Figure 60, Calendar Properties, ***Select Display Fields*** *window*

The same calendar entry can be configured to display differently depending on the fields selected. The **Separate fields with** option on the **General** tab allows you to select one of five separators to distinguish between individual fields. Figure 59 uses the Hyphen separator, whereas Figure 61 uses the Semicolon separator.

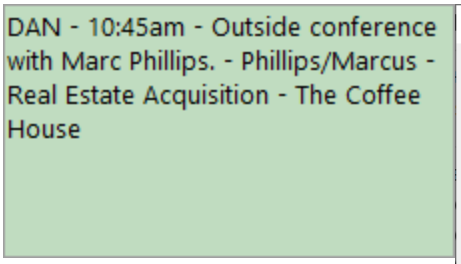


Figure 61, Example of a Calendar Entry using Display Fields from Figure 62

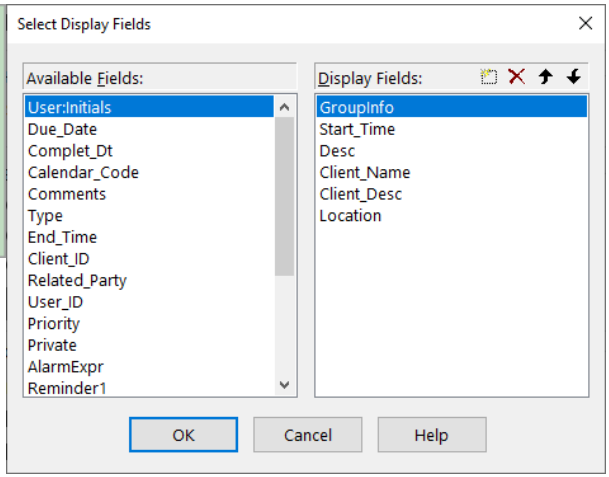


Figure 62, Calendar Properties, ***Select Display Fields*** *window*

▶ To add a field from the list of Available Fields to the Display Fields column

1. From the **Available Fields** column of the **Select Display Fields** window, select the field and click the icon in the **Display Fields** column.
2. Use the and icons to rearrange the order of fields in the **Display Fields** column.
3. To remove a field from the **Display Fields** column, click the icon.

Event Colors

The **Event Colors** section allows each user to specify what colors PracticeMaster uses to display event and task calendar records in the Calendar window or on the Graphical Calendar Report. There are three options to choose from:

- **Event Colors are based on User ID information:** When this option is selected, PracticeMaster displays calendar entries based on the **Colors used for PracticeMaster Calendar entries** setting found in the User Configuration window in System Configuration *(Figure 63)*.
- **Event Colors are based on Calendar Code information:** When this option is selected, PracticeMaster displays calendar entries based on the colors specified in the **Text Color** field of the **Calendar Code** window *(Figure 64)*.
- **Use default colors for all events:** When this option is selected, all calendar events will be displayed using the text and background color defined in the **Default Event Color** field.

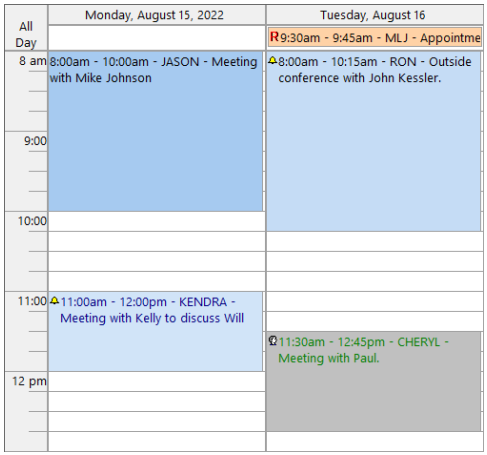


Figure 63, Event colors based on Calendar Code information

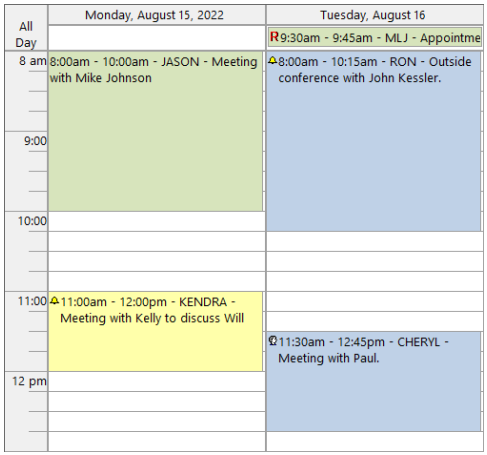


Figure 64, Event colors based on User ID information

Task List Tab

The **Task List** tab *(Figure 57)* allows you to customize the Task List in the Calendar window and in the Task List window.

Column Layout

The **Column Layout** field allows each user to select which column layout to use when viewing the Task List in the Calendar window or the Task List window. The Task List window does not use the Quick Clicks pane; therefore, the only way to change the column layout is via the **Task List** tab of Calendar Properties.

Index to Use for Sorting

The **Index to use for Sorting** field is used to specify how tasks are sorted in the Task List in the Calendar window and in the Task List window. By default, this field is set to use the **Tasks Only** index. You can also assign a user-defined index to use for sorting; however, this index must use the following sort orders in order to be shown in the drop-down list.

- Type
- User ID
- Complete_Dt
- One additional field

Time Zone Tab

The **Time Zone** tab *(Figure 58)* is used to configure which time zone the Calendar window is displayed in. This is generally controlled by your computer's setting, but can be overridden if you need to use a specific time zone.

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**.

Calendar Overview

Calendar Plans & Calendar Plan Templates

Menu: ***Calendar | Calendar Plan Templates***
Home: ***All Actions | Calendar | Calendar Plan Templates***
Quick Launch: ***Calendar Plan Templates***

A Calendar Plan Template consists of a predefined group of interrelated dates that apply to a particular type of job, filing deadline, etc. Once a Calendar Plan Template has been defined, it can be used over and over again to automatically generate a Calendar Plan. A Calendar Plan consists of a defined set of calendar items based on a specific date entered by the user at the time that a Calendar Plan Template is run.

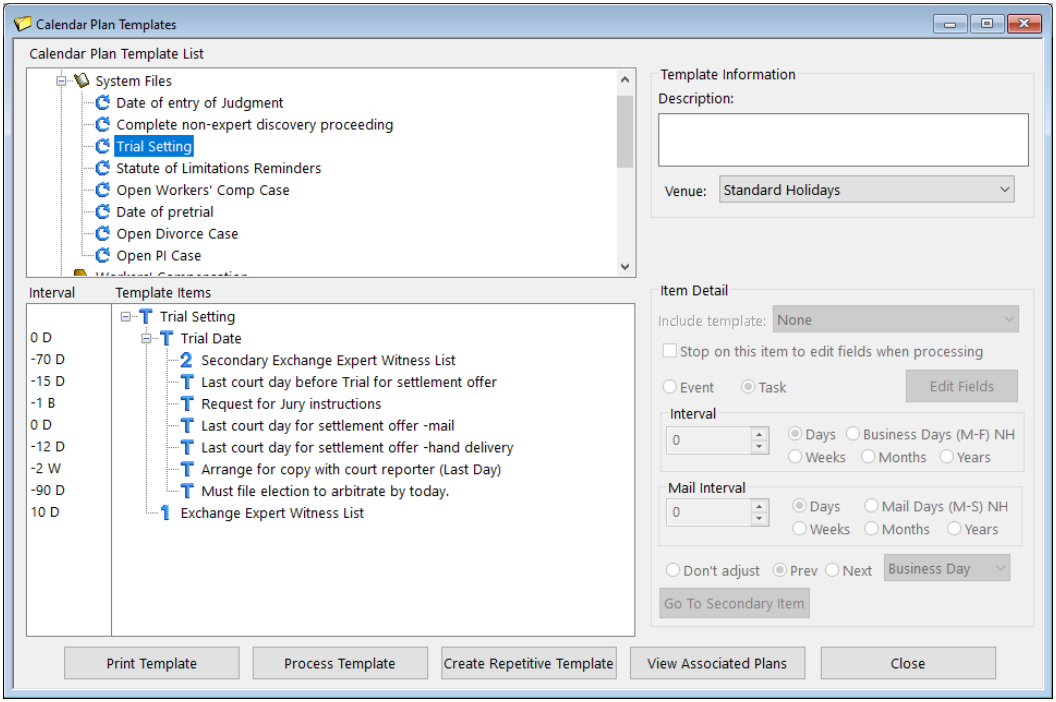


*Figure 65, **Calendar Plan Templates** window*

Creating a Calendar Plan Template

All Calendar Plan Templates begin with a Key item. A Key item is the base item or "root" for any additional calendar items. The first link to a Key item is called a dependent item. These are items whose date is determined by the date of a Key item or another calendar item. For example, a Key item would be the opening of a Workers' Compensation case, while the

dependent item would be the filing of a claim with the Workers' Compensation Court. The date of the claim depends on the date that the case is opened.

After adding a dependent item, you can continue adding related calendar items that link to the Key item and Dependent items. These are known as Sibling and Secondary items.

Calendar records can be assigned to more than one user or group. Variables can be used allowing the user to specify unique text for designated calendar records when the Calendar Plan Template is generated.

More Info: Additional information on how to use variables can be found in PracticeMaster Help.

▶ To add a Calendar Plan Template

1. In the Quick Launch, search for and select "Calendar Plan Templates."
2. From the **Calendar Plan Template List**, right-click an Area of Practice and select **Add New Plan Template**.
3. A new branch will be displayed under the Area of Practice with "new template" highlighted.
    a. Type the Calendar Plan Template name over "new template".
    b. Press the Tab key.
4. In the **Description** field of the Template Information section, enter the description for the Calendar Plan Template.
    - Press the Tab key.
5. In the **Venue** field, select the Venue to be used for the Calendar Plan Template.
6. Under the **Template Items** pane, right-click the Key item and select **Rename** to label the Key item for the Calendar Plan Template.
    - Press the Enter key.
7. Specify the settings for the Key item in the **Item Detail** section.
8. When the Key item is selected, add a Dependent item by right-clicking the Key item and selecting **Add Dependent Item**.
9. A new branch will be displayed under the Key item with "new item" highlighted. Type the template item name over "new item".
    - Press the Enter key.

10. Specify the settings for the new item in the **Item Detail** section.
11. Continue to add Dependent items or Sibling items by right-clicking the template item it is dependent on or related to and selecting **Add Dependent Item** or **Add Sibling Item** until the template is complete.
12. When completed, press Ctrl+S to save the Calendar Plan Template.
13. Click **Close** to exit the Calendar Plan Templates window.

Generating a Calendar Plan

Once you have created a Calendar Plan Template, you can generate a Calendar Plan from the template.

▶ To generate a Calendar Plan from a Calendar Plan Template

1. In the Quick Launch, search for and select "Calendar Plan Templates."
2. From the Calendar Plan Template List, click the plus (+) sign next to the Area of Practice to which the Calendar Plan Template is assigned.
3. Highlight the Calendar Plan Template to be processed.
4. Click the **Process Template** button.
5. In the **Process Template** window, specify a **Plan name** and make any changes to the remaining fields in the Process Template window.
6. Click **OK**.
7. If a template item requires additional information, the **Calendar File** window will be displayed. Add the information and close the **Calendar File** window.
8. Once the Calendar Plan is generated, a **Preview of Plan** window will be displayed. To accept the plan, click the **Accept Plan** button.
9. In the Calendar Plan Templates window, click **Close**.

Calendar Plan Templates and WorkFlows

Calendar Plan Templates can also be processed as part of a WorkFlow *(page 89)*. For example, suppose you have created a WorkFlow on the Client file to run when the **Statue of Limitations** field is populated with a date. You can configure a WorkFlow action to process the Statute of Limitations Calendar Plan Template as part of the WorkFlow. The Calendar Plan Template then creates your standard series of reminders. You can even have different Statute of Limitations WorkFlows for different types of matters.

More Info: Additional information on Calendar Plans and Calendar Plan Templates can be found in PracticeMaster Help.

Outlook® Synchronization

Menu	***Maintenance | Integration | Outlook Synchronization***
Home:	***All Actions | Integration | Outlook Synchronization***
Quick Launch:	***Outlook Synchronization***

PracticeMaster has the ability to synchronize calendar and contact records with Microsoft® Outlook. Records added in PracticeMaster can synchronize to Outlook; likewise, records added in Outlook can synchronize to PracticeMaster. This powerful integration is primarily maintenance-free once set up. PracticeMaster stores all of your client and case information. Integrating your PracticeMaster contacts and calendar with Outlook makes it easy for you to take your current calendar and contact list with you in Outlook, as well as synchronize it to your smartphone.

Full details on the integration between PracticeMaster and Outlook can be found in the ***Outlook Integration Guide***.

Conflict of Interest Searching

PracticeMaster includes powerful conflict searching capabilities. The ***PracticeMaster Search Guide*** includes complete details regarding conflict searching. However, this section of the ***Customizing PracticeMaster Guide*** summarizes the areas that can be customized.

There are two areas of conflict searching that you can customize:

- Fields to search
- Fields to print on the Conflict of Interest Report

Both of these areas are configured in File Maintenance as shown in Figure 66.

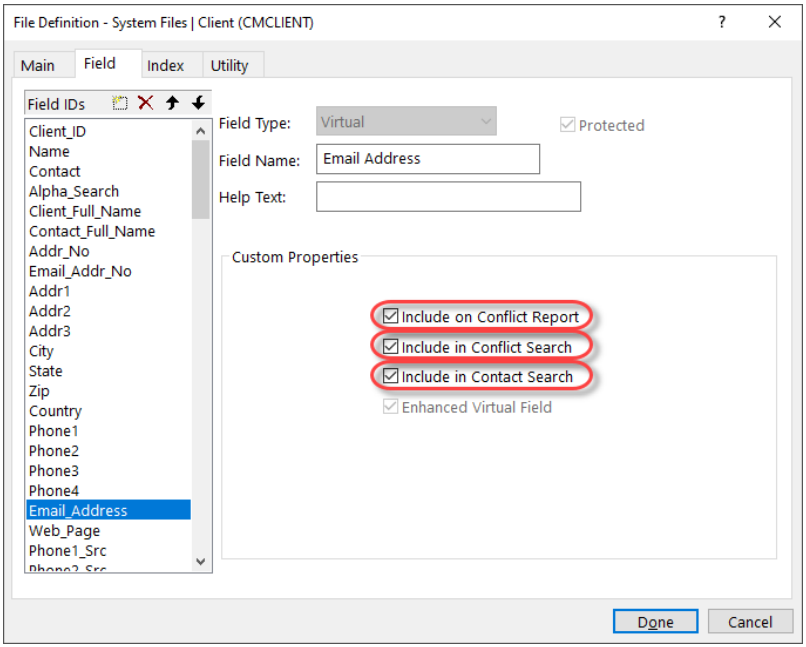


*Figure 66, File Maintenance **Field** tab*

The three properties that relate to conflict searching as shown in Figure 66 are **Include on Conflict Report**, **Include in Conflict Search**, and **Include in Contact Search.**

Include on Conflict Report

The **Include on Conflict Report** option allows you to select which fields will be displayed when a Conflict of Interest Report is printed or previewed. Fields that are configured to display on the Conflict of Interest Report will also display on the Document Search Report.

This option is useful for providing additional information about a record where a conflict was found. For example, if a conflict is found in the Client file, you may want to include the **Date Closed** on the Conflict of Interest Report. These fields can be included on the report for informational purposes in order to help you evaluate the significance of the conflict.

Include in Conflict Search

The **Include in Conflict Search** option allows you to choose whether or not a field will be searched when Conflict of Interest searches are run.

Include in Contact Search

The **Include in Contact Search** option allows you to choose whether or not a field will be searched when contact searches are run. The Contact Search is intended to search a more limited group than the Conflict of Interest Search. All items included in the Contact Search are automatically a part of the Conflict of Interest Search.

After you have configured the fields that you want to include in the Conflict Search and on the Conflict Report, an initial rebuilding of the Conflict of Interest index file is required in order to include previously entered information in those fields.

▶ To rebuild the Conflict of Interest index files

1. In the Quick Launch, search for and select "Search Settings."
2. On the **Rebuild Index** tab, select the **Conflict/Contact Index** check box.
3. Click the **Rebuild Now** button to begin the rebuild process.
4. Upon completion, a window will be displayed indicating that the task completed

successfully. Click **OK**.

5. Click **OK** to close the **Search Settings** window.

Once rebuilding is complete, you are ready to run a conflict or contact search. Items that have been included in the Conflict Search and on the Conflict Report will be displayed as "hits" on the Conflict of Interest Report. Figure 67

Date: 08/26/2024 **Conflict of Interest Report** Page: 1
Jensen, Martin & Anderson, P.C.

Partial word search for: **TATIKI**

415.00 MegaConstruction Corporation Client Modified: 08/26/2024
Corporate Merger - Megabuilders and BuilderCorp Primary: 3 RPA
Email Address: jt@megaconcorp.com
Date Closed: 08/26/2024
Contact Name: **Tatiki**, Sr./James R.

MegaConstruction Corporation Contact Modified: 07/25/2024
Client
Contact Category: Client
Contact Name: **Tatiki**, Sr./James R.

Tatiki, Sr./James R. Contact Modified: 07/25/2024
Client Contact
Contact Category: Client Contact
Full Name: James R. **Tatiki**, Sr.
Last Name: **Tatiki**, Sr.

TATIKI found in 3 records

Figure 67, Conflict of Interest Report

Reviewing Which Fields are Conflict Checked

By default, the files provided with PracticeMaster are configured to include conflict searching on the pertinent fields. However, we recommend that you review which fields are being searched in each data file. An easy way to systematically review which fields are being searched is to print out File Definitions for each file.

▶ To print all File Definitions for All System Files

1. In the Quick Launch, search for and select "File Maintenance."
2. Right-click **System Files**.

3. Select **Print File Definitions for All System Files**.

▶ To print a single File Definition

1. In the Quick Launch, search for and select "File Definition Report."
2. Select the desired file and click **OK**.

Figure 68 is an example of a printed File Definition.

Date: 08/26/2024

File Definition
Jensen, Martin & Anderson, P.C.

Page: 1

AOP Name **: CMSYSTEM**
AOP Description **: System Files**

File Name : CMCLIENT
File Description : Client
File Type : Variable
Fixed Record Size : 3,361
Number of indexes : 12
Total fields : 115
Protected Fields : 64
Other Fields : 51
Number of records : 12

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnflt	Rep	Rst	Len	Dec	Min Value	Max Value
Client_ID	Client ID	Client ID	Y	Y	N	N	N	N	N	13	0		
Name	Client Name	Contact	Y	N	N	Y	Y *	Y	N	54	0		
Contact	Contact Name	Contact	Y	N	N	Y	Y *	Y	N	54	0		
Alpha_Search	Name Search	Alpha	Y	N	N	Y	Y	Y	N	50	0		
Client_Full_Name	Client Full Name	Enhanced Virtual	Y	N	N	N	N	N	N	255	0		
Contact_Full_Name	Contact Full Name	Enhanced Virtual	Y	N	N	N	N	N	N	255	0		
Addr_No	Address Number	Short	Y	N	N	Y	N	Y	N	2	0		
Email_Addr_No	Email Address Number	Short	Y	N	N	Y	N	Y	N	2	0		
Addr1	Address Line 1	Enhanced Virtual	Y	N	N	N	N	N	N	50	0		
Addr2	Address Line 2	Enhanced Virtual	Y	N	N	N	N	N	N	50	0		
Addr3	Address Line 3	Enhanced Virtual	Y	N	N	N	N	N	N	50	0		
City	City	Enhanced Virtual	Y	N	N	N	N	N	N	50	0		
State	State	Enhanced Virtual	Y	N	N	N	N	N	N	3	0		
Zip	Zip Code	Enhanced Virtual	Y	N	N	N	N	N	N	10	0		
Country	Country	Enhanced Virtual	Y	N	N	N	N	N	N	50	0		
Phone1	Phone 1	Enhanced Virtual	Y	N	N	N	Y *	N	N	31	0		
Phone2	Phone 2	Enhanced Virtual	Y	N	N	N	Y *	N	N	31	0		
Phone3	Phone 3	Enhanced Virtual	Y	N	N	N	Y *	N	N	31	0		
Phone4	Phone 4	Enhanced Virtual	Y	N	N	N	Y *	N	N	31	0		
Email_Address	Email Address	Enhanced Virtual	Y	N	N	N	Y *	N	N	100	0		
Web_Page	Web Page	Enhanced Virtual	Y	N	N	N	Y *	N	N	1023	0		
Phone1_Src	Phone 1 Source	Alpha	Y	N	N	N	N	Y	N	20	0		
Phone2_Src	Phone 2 Source	Alpha	Y	N	N	N	N	Y	N	20	0		
Phone3_Src	Phone 3 Source	Alpha	Y	N	N	N	N	Y	N	20	0		
Phone4_Src	Phone 4 Source	Alpha	Y	N	N	N	N	Y	N	20	0		

Figure 68, Example of a File Definition Report

The **Cnflt** and **Rep** columns on the File Definition report indicate how the fields are configured for conflict searching.

- The **Cnflt** column includes a **Y** or an **N** for each field in the file. A **Y** indicates the file is configured to be included in conflict searches, whereas an N indicates the field is configured to not be included in conflict searches. An asterisk (*) indicates the field is configured to be included in contact searches. A plus sign "+" indicates the field will be printed on the conflict report and contact report.

More Info: Additional information on the Conflict of Interest search can be found in Knowledge Base Article **R11445**, "Using the PracticeMaster Conflict of Interest Search."

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**.

Conflict of Interest Search

Convert to Fee Settings

Menu: ***Maintenance | Preferences | Convert to Fee Settings***
Quick Launch: ***Convert to Fee Settings***

The Convert to Fee window is a useful tool that makes it easy to create fees from existing calendar records, document management records, and journal records, which includes email, notes, phone, research, and timer records. You can convert an item by right-clicking it and selecting **Convert to Fee** from the **Action** menu option. If using Tabs3 Billing software, fees are automatically sent to Tabs3 for billing purposes.

You can set default preferences for converting records to fees using the Convert to Fee Settings window. These settings are user-specific, meaning that users can configure their settings to suit their own needs.

▶ To define default Convert to Fee Settings

1. In the 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** to close the window.

The Convert to Fee Settings window is made up of seven tabs. Each tab includes settings specific to the type of record being converted to a fee.

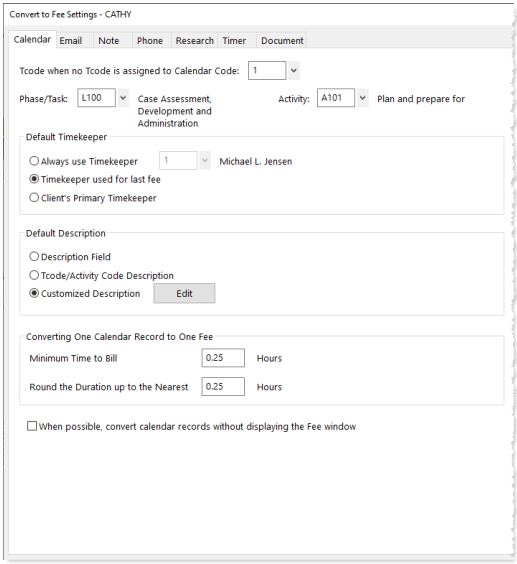


*Figure 69, Convert to Fee Settings - **Calendar** tab*

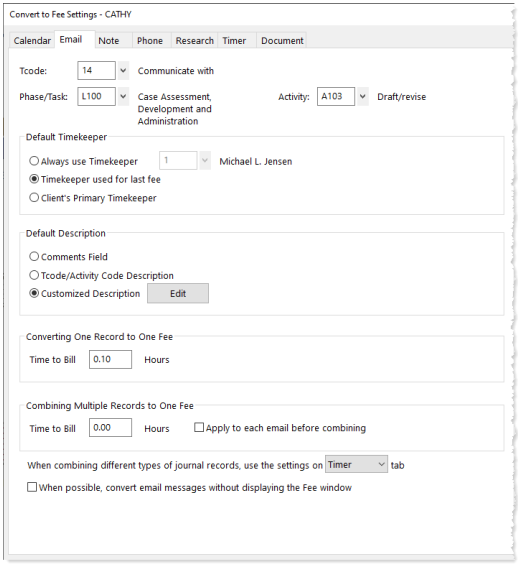


*Figure 70, Convert to Fee Settings - **Email** tab*

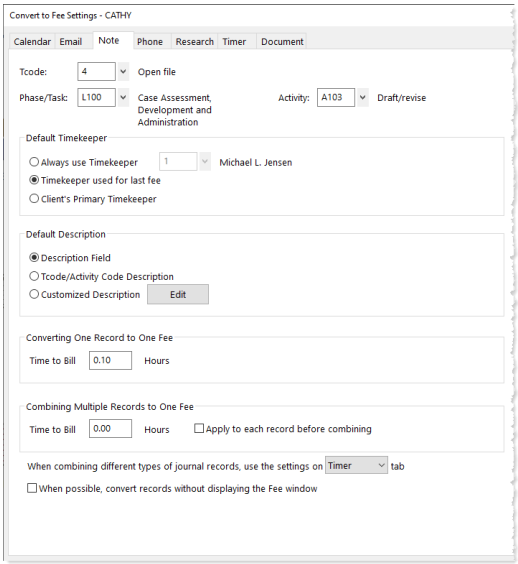


*Figure 71, Convert to Fee Settings - **Note** tab*

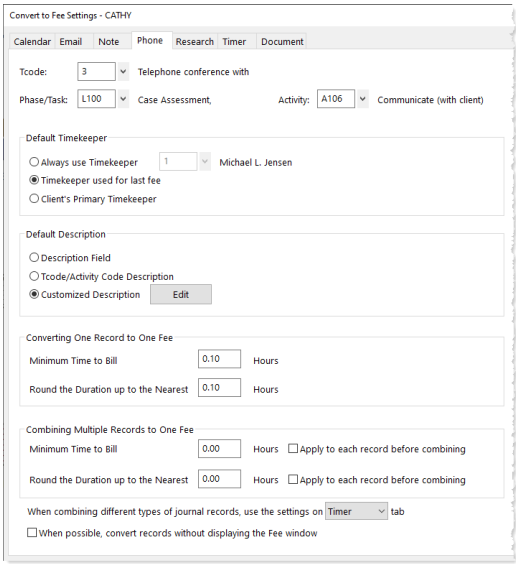


*Figure 72, Convert to Fee settings - **Phone** tab*

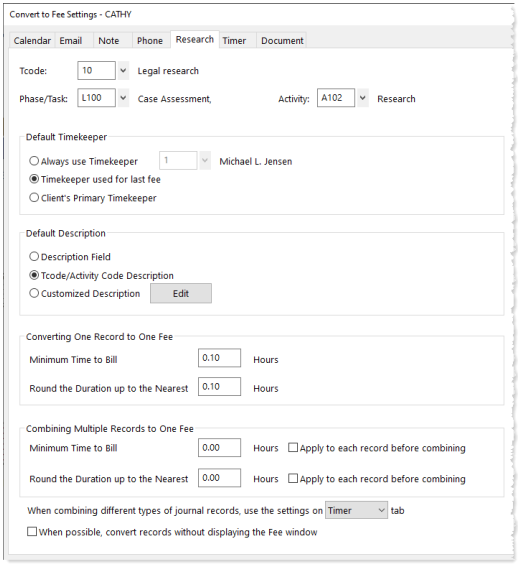


*Figure 73, Convert to Fee Settings - **Research** tab*

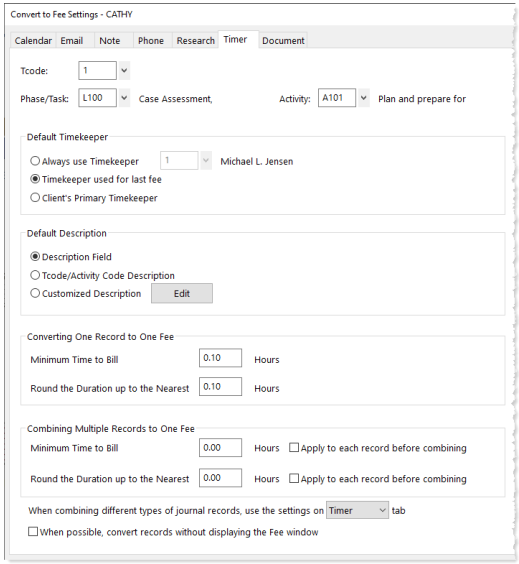


*Figure 74, Convert to Fee Settings - **Timer** tab*

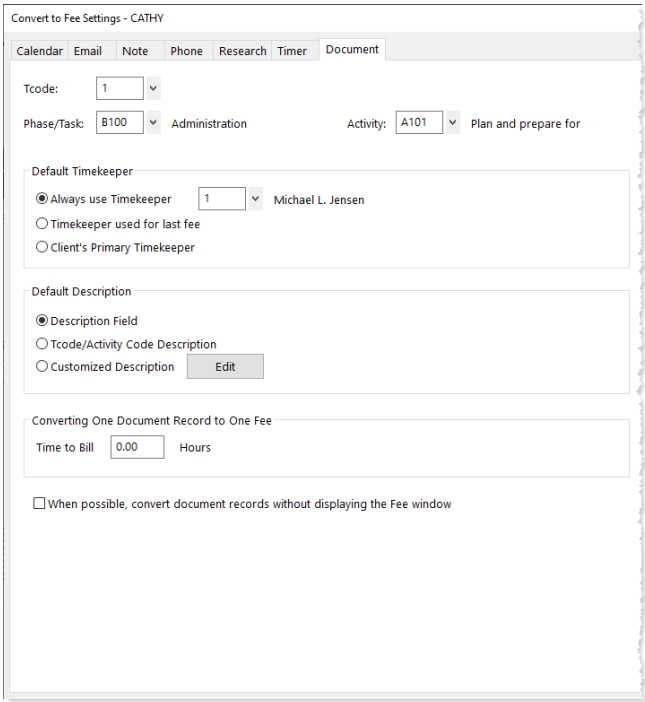


*Figure 75, Convert to Fee Settings - **Document** tab*

Other Areas to Customize

The following section includes information on customization settings for functions that are used on a day-to-day basis.

History Tracking

The History Tracking feature allows users to track all additions and changes made to specific fields in a file.

In order to begin using History Tracking, the feature must be enabled in PracticeMaster Customization (***Utilities | Customization***). You can also specify a maximum size to use for the history file.

Once history tracking has been enabled at the firm level, you can configure individual fields to use History Tracking. This option appears as a check box on the **Field** tab of the File Maintenance window *(page 10)*.

You can view history for a record by selecting the record and clicking the **Display History** option in the **Take Action** section of the Quick Clicks pane, or by right-clicking the record, pointing to **Action**, and selecting **Display History**.

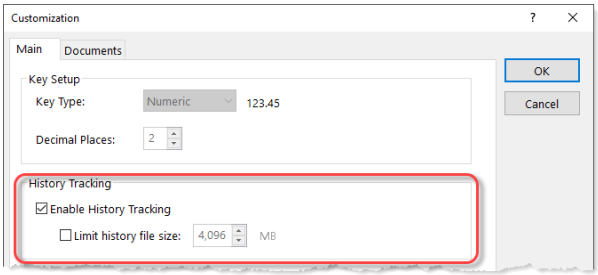


*Figure 76, **History Tracking** in Customization*

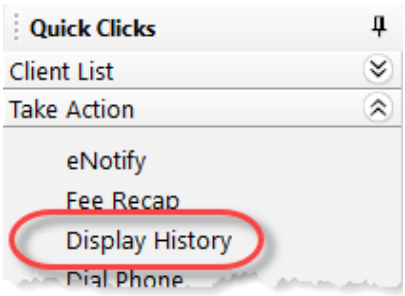


*Figure 77, **Display History** option in Quick Clicks pane*

Clicking the **Display History** check box will open the **Record History** window. This window displays information about the record, such as the record's creation date, as well as any changes made to the record.

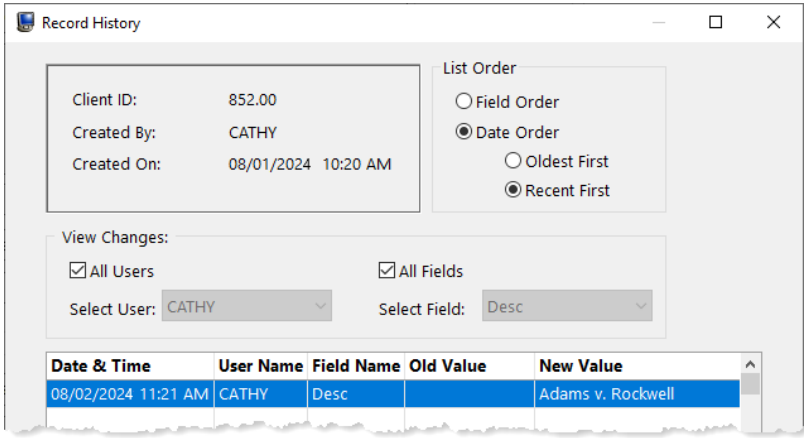


*Figure 78, **Record History** window*

Note: Additional information regarding configuring History Tracking for the firm and for individual fields can be found in the ***Administrator Guide*** and PracticeMaster Help.

Email Preferences

Menu ***Maintenance | Preferences | Email Preferences***
Quick Launch: ***Email Preferences***

The Email Preferences window is used to configure email integration between PracticeMaster and MAPI email software such as Microsoft Outlook. These settings are stored separately in the User Profile for each User ID.

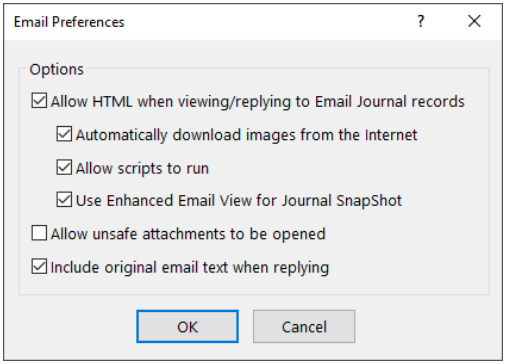


Figure 79, Email Preferences window

Allow HTML when viewing/replying to email Journal records

When this check box is selected, PracticeMaster will be able to view and send HTML formatted emails. This means that PracticeMaster will use web standards to view and send HTML email without having to open a web browser. When this check box is cleared, you will not be able to view or send HTML email via PracticeMaster.

> **Note:** Selecting this check box will display a **Confirmation Required** window, which is displayed to make the user aware that if this option is selected, PracticeMaster has no security control over HTML content. For security reasons, you may want to leave this option disabled.

Automatically download images from the Internet

This check box (which is only available when **Allow HTML when viewing/replying to Email Journal records** is selected) controls whether images that are linked to an email are automatically downloaded when the email is viewed. If this check box is cleared, a or symbol will appear in place of the embedded image.

Allow scripts to run

This check box (which is only available when **Allow HTML when viewing/replying to Email Journal records** is selected) allows active content sent via email to execute when an email is viewed. When this check box is cleared, scripts embedded in an email will not be allowed to execute.

Use Enhanced Email View for Journal SnapShot

This check box (which is only available when **Allow HTML when viewing/replying to Email Journal records** is selected) determines whether emails will be displayed using Plain Text or Enhanced Email View when viewing the Journal record in the SnapShot.

Note: While this check box determines whether a SnapShot will display in Enhanced Email View or Plain Text by default, you can toggle between these options for individual records by using the right-click menu options in the SnapShot or by pressing Ctrl+F1.

Allow unsafe attachments to be opened

When this check box is selected, opening an attachment with a file extension that is considered unsafe displays a message asking you to confirm that you want to open the attachment. When this check box is cleared, attempting to open a file with an extension that is considered unsafe will display a message indicating that the file cannot be opened.

Caution: Some email software, including Outlook, prohibits unsafe attachments from being opened. Be aware that PracticeMaster can be configured to allow unsafe attachments to be opened even though the email software does not.

Caution: If you decide to open email attachments, be aware that PracticeMaster has no control over what happens after the attachment is opened. All attachments should be scanned for viruses prior to opening.

Include original email text when replying

When this check box is selected, the original email text will be included when you reply to an email. When this check box is cleared, replies will not contain the original email text.

Matter Manager

The Matter Manager can be customized for each user to include the client-specific functions used most frequently.

Custom Activity Lists

Along with the record lists already available in the Matter Manager, you can create Custom Activity Lists to display the record types you access most often. You can load a Custom Activity List by right-clicking anywhere in the Record List and selecting **Custom Activity List**, or by selecting the desired list from the drop-down menu at the top of the Matter Manager.

Custom Taskbar

The Custom Taskbar, located at the bottom left of the Matter Manager, can be configured to include common actions that can be performed from the Matter Manager window. When appropriate, such as for reports, the window will be restricted to the currently selected client by default.

More Info: Additional information on the Matter Manager, such as instructions on setting up new Custom Activity Lists, can be found in the ***Matter Manager Quick 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**.

Using the Matter Manager

Timer Preferences & Visual Timer Display Properties

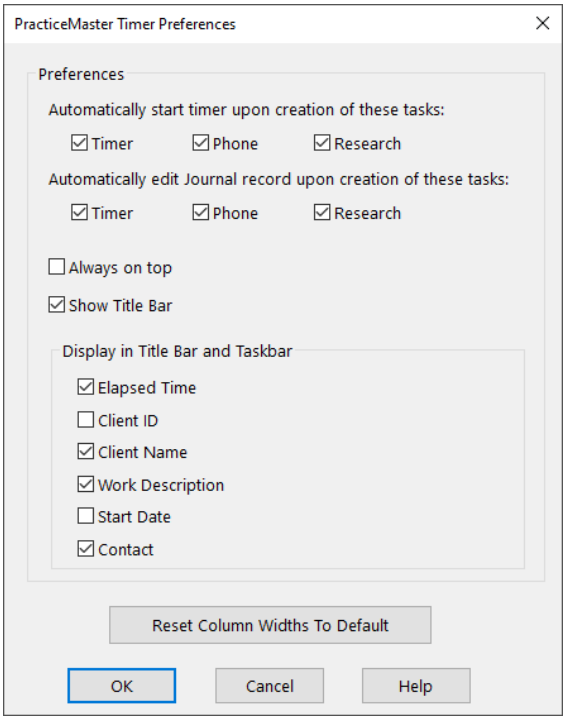


Figure 80, Timer Preferences window

The Timer Preferences window can be accessed in the Quick Launch by searching for and selecting "Timer Preferences." From this window, you can specify when to automatically start a timer, automatically edit a journal record, choose what options to display in the title bar and taskbar, and more.

Visual Timer Display Properties

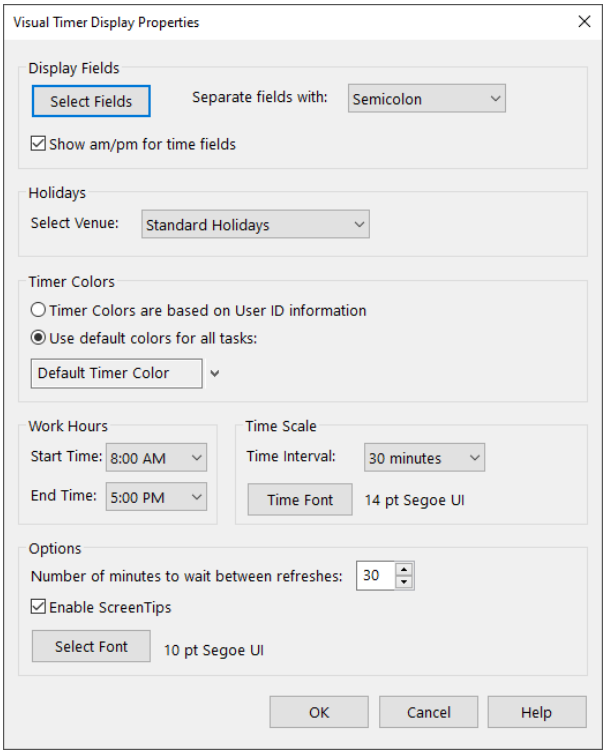


Figure 81, Visual Timer Display Properties

The Visual Timer Display Properties window can be accessed by right-clicking anywhere in the Timer Display area of the Visual Timer Display window and selecting **Properties**.

More Info: Additional information regarding the Visual Timer Display Properties fields can be found in PracticeMaster Help.

eNote Preferences

Firms running the Platinum edition of the PracticeMaster software have access to eNote, an intra-office messaging system that makes it easy to send and receive quick messages to and from other PracticeMaster users. You can also use eNote to send co-workers links to appointments, documents, journal records and more for quick reference.

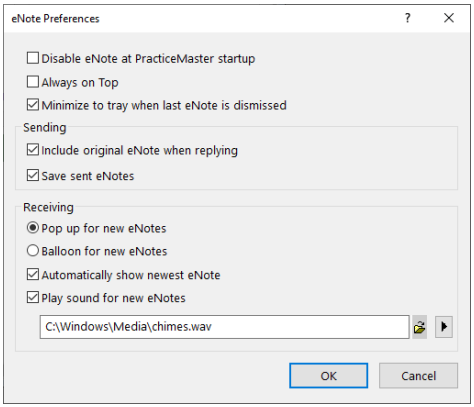


Figure 82, eNote Preferences window

The eNote Preferences window is used to configure various eNote settings, such as whether eNote is enabled at PracticeMaster startup, always on top of current tasks, minimized after the last eNote is dismissed, and more.

Several of the available options are self-explanatory. Options that require a more detailed explanation are discussed below.

Disable eNote at PracticeMaster startup

When this check box is selected, the eNote window will not open automatically when PracticeMaster is started. Your user status will appear Offline to other users until you manually open the eNote window (in the Quick Launch by searching for and selecting "eNote," or by pressing *Ctrl+E*).

> **Note:** Selecting this preference is the only way to disable eNotes for Manager users.

Always on Top

When this check box is selected, eNotes will always display on top of all other open windows on the desktop unless they are manually minimized.

Minimize to Tray when last eNote is dismissed

When this check box is selected, the eNote window will return to the Windows system tray when the last unread eNote is dismissed.

More Info: Additional information regarding eNote can be found in Knowledge Base article **R11246**, "PracticeMaster eNote Frequently Asked Questions".

Part 3 - Focus Areas

Part 3 of the ***Customizing PracticeMaster Guide*** introduces the features that do not necessarily need to be implemented before you can begin using PracticeMaster, and can instead be introduced as you see fit.

The content covered in this section includes:

- An introduction to check request entry and review
- An introduction to PracticeMaster Document Management
- Information on the options available for performing document assembly
- An introduction to the PracticeMaster Report Writer

Check Requests

Check requests are a feature of the Platinum edition of Tabs3 Software that allows the adding and reviewing of requests for reimbursement using PracticeMaster, and then the creation of invoices or trust transactions based on those requests in Tabs3 Accounts Payable or Tabs3 Trust Accounting.

More Info: Additional information regarding Check Requests can be found in the ***Accounts Payable Guide***, the ***Trust Accounting Guide***, and in the following Knowledge Base article at **support.Tabs3.com**.

- Knowledge Base Article **R11923** - Tracking Check Requests

Overview

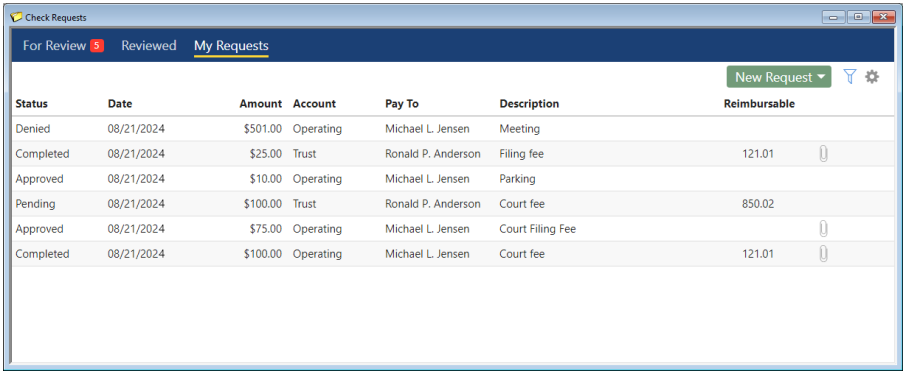
From the Quick Launch, search for and select "Check Requests." The Check Requests window has three page views:

- A list of all your check requests are shown on the **My Requests** page view. Click the New Request button to start a new check request.

  Note: Users without access rights to review check requests will only see the **My Requests** page view in the Check Requests window.

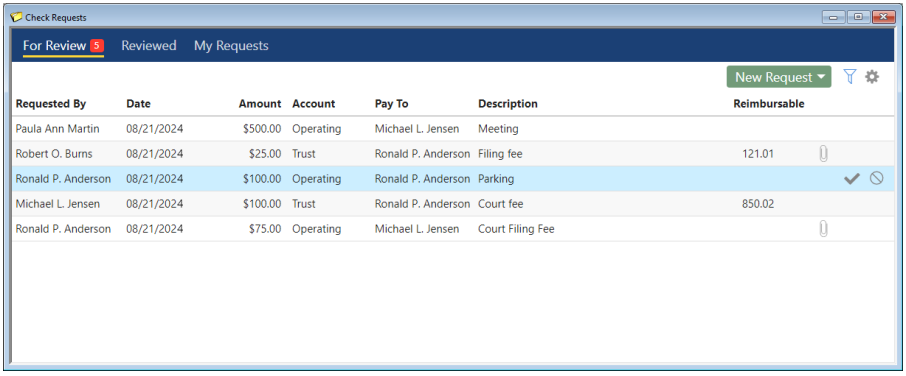
- A list of unreviewed check requests are shown on the **For Review** page view.
- Check requests that have been reviewed are shown on the **Reviewed** page view.

Click on a row to review the check request, or click the icon to open the attachment.



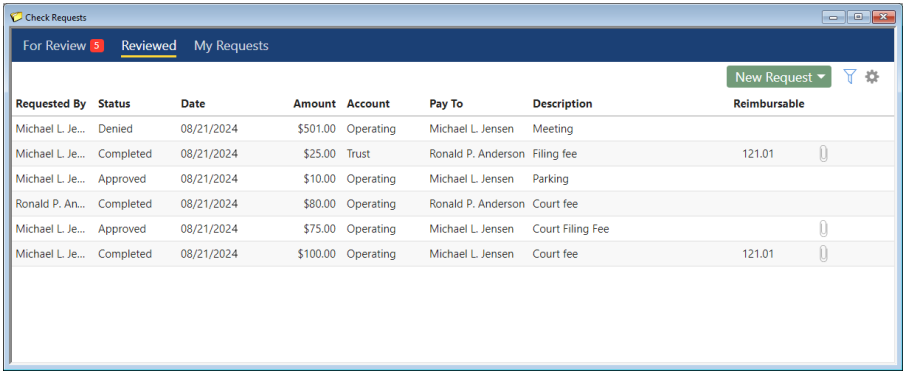
Status	Date	Amount	Account	Pay To	Description	Reimbursable
Denied	08/21/2024	$501.00	Operating	Michael L. Jensen	Meeting	
Completed	08/21/2024	$25.00	Trust	Ronald P. Anderson	Filing fee	121.01
Approved	08/21/2024	$10.00	Operating	Michael L. Jensen	Parking	
Pending	08/21/2024	$100.00	Trust	Ronald P. Anderson	Court fee	850.02
Approved	08/21/2024	$75.00	Operating	Michael L. Jensen	Court Filing Fee	
Completed	08/21/2024	$100.00	Operating	Michael L. Jensen	Court fee	121.01

Figure 83, My Requests page view of the Check Requests window



Requested By	Date	Amount	Account	Pay To	Description	Reimbursable
Paula Ann Martin	08/21/2024	$500.00	Operating	Michael L. Jensen	Meeting	
Robert O. Burns	08/21/2024	$25.00	Trust	Ronald P. Anderson	Filing fee	121.01
Ronald P. Anderson	08/21/2024	$100.00	Operating	Ronald P. Anderson	Parking	
Michael L. Jensen	08/21/2024	$100.00	Trust	Ronald P. Anderson	Court fee	850.02
Ronald P. Anderson	08/21/2024	$75.00	Operating	Michael L. Jensen	Court Filing Fee	

Figure 84, For Review page view of the Check Requests window



Requested By	Status	Date	Amount	Account	Pay To	Description	Reimbursable
Michael L. Je...	Denied	08/21/2024	$501.00	Operating	Michael L. Jensen	Meeting	
Michael L. Je...	Completed	08/21/2024	$25.00	Trust	Ronald P. Anderson	Filing fee	121.01
Michael L. Je...	Approved	08/21/2024	$10.00	Operating	Michael L. Jensen	Parking	
Ronald P. An...	Completed	08/21/2024	$80.00	Operating	Ronald P. Anderson	Court fee	
Michael L. Je...	Approved	08/21/2024	$75.00	Operating	Michael L. Jensen	Court Filing Fee	
Michael L. Je...	Completed	08/21/2024	$100.00	Operating	Michael L. Jensen	Court fee	121.01

Figure 85, Reviewed page view of the Check Requests window

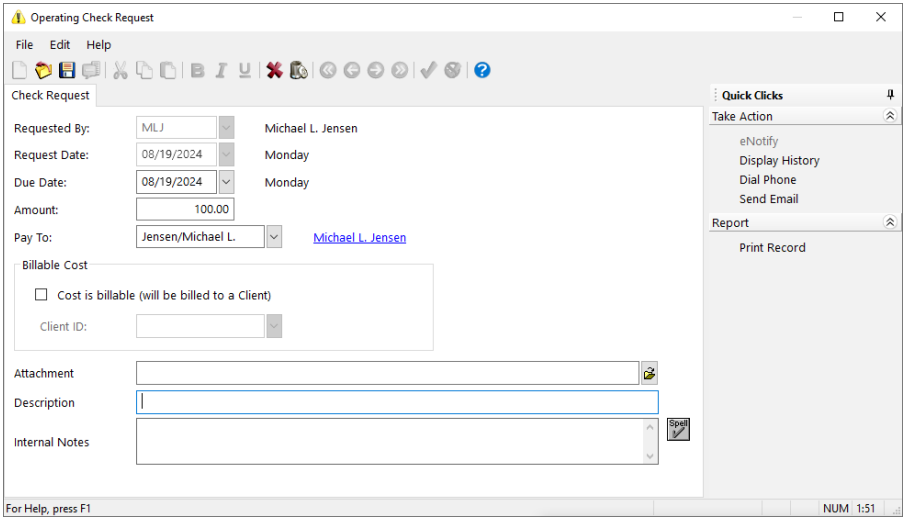


Figure 86, New Operating Check Request

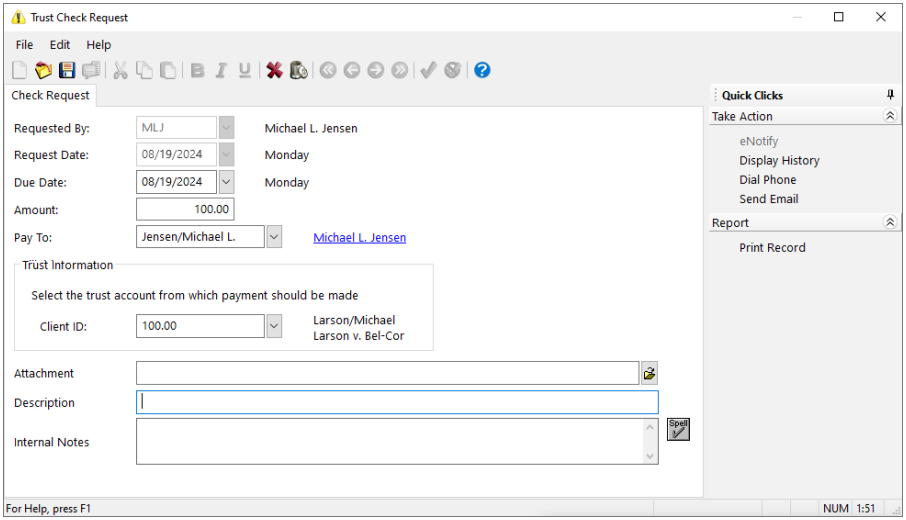


Figure 87, New Trust Check Request

The fields for a check request that are not self-explanatory are explained below.

Requested By

The **Requested By** field shows the user who created the check request.

Pay To	The **Pay To** field shows the contact to which a check should be sent.
Reimbursable	The **Reimbursable** field shows what client matter in PracticeMaster should be billed for this check. If an invoice or trust transaction is created for this check request, an associated cost transaction will be defaulted for this amount in AP, or the trust transaction will default to this client's account in Trust.
Attachment	The **Attachment** icon links an electronic copy of an invoice or receipt to an invoice, allowing it to easily be stored and accessed.

▶ To create a new check request

1. In the Quick Launch, search for and select "Check Requests."
2. Click **New Request**, and (if both Trust and AP are installed) click **New Operating Request** to create a request for payment through the firm's operating account or click **New Trust Request** to create a request for payment from a client's trust account.
    1. Enter the **Due Date** of when the request needs to be paid.
    2. Enter the **Amount** of the expense that needs reimbursed.
    3. In the **Pay To** field, select the contact who will receive the payment.
    4. Enter a **Description** of the expense.
3. For an Operating Check Request:
    - If this expense was paid on behalf of a client, select the **Cost is billable (will be billed to a Client)** check box, and specify the **Client ID**.
4. For a Trust Check Request:
    - Specify the **Client ID** on whose behalf this expense was paid.
5. If you have a receipt or other paperwork, specify the file location in the **Attachment** field. This file will be copied into the Check Requests subfolder of PracticeMaster's Current Working Directory.
6. Enter any additional information about the check request and then click **Save**.

Check Request Settings

PracticeMaster can be configured to automatically approve check requests up to a specific amount, and optionally specify groups of users who can review check requests based on its amount. Only Managers have rights to the Check Request Settings window.

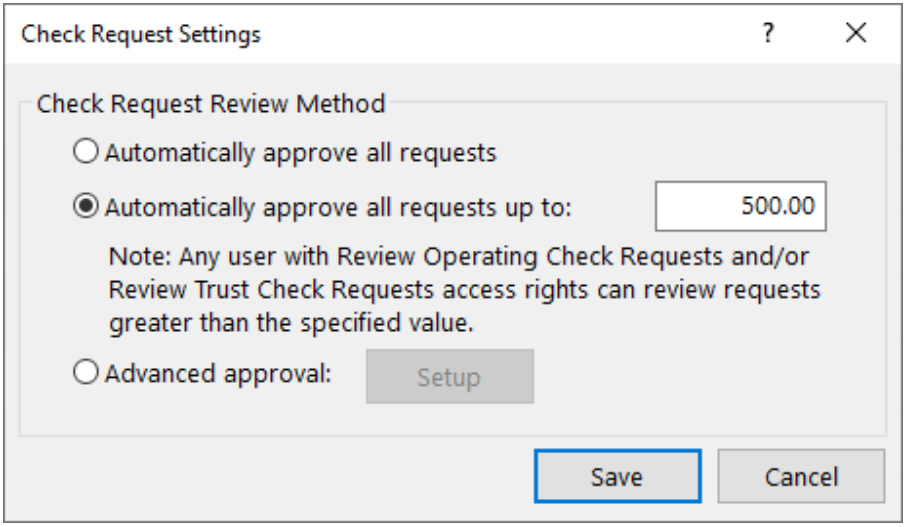


Figure 88, Check Request Settings window

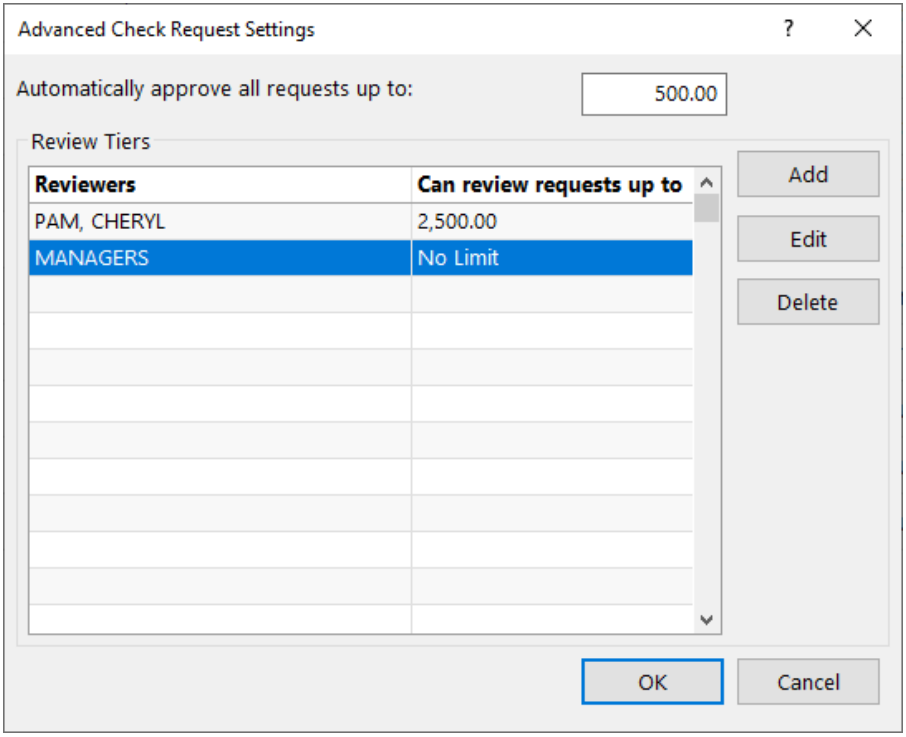


Figure 89, Advanced Check Request Settings window

▶ To configure review settings for check requests

1. In the Quick Launch, search for and select "Check Request Settings."
2. Choose which approval option to use:
    - Select **Automatically approve all requests** if no review is necessary. As soon as a check request is saved, it will be approved and appear in Trust or AP.
    - Select **Automatically approve all requests up to** and specify a value if users who can review check requests can review them regardless of amount. If a check request at or below the specified amount is saved, it will be approved and appear in Trust or AP. If a check request over the specified amount is saved, it must be reviewed by someone with the Review Operating Check Requests or Review Trust Check Requests access right (depending on the type of request).
      Tip: *Select this option and leave the value at zero to require all check requests*

to be approved, and any user with access rights to review check requests can approve them.

- Select **Advanced approval** if users who can review check requests will be limited by the amount of the check request. If a check request at or below the specified amount is saved, it will be approved and appear in Trust or AP. If a check request over the specified amount is saved, it must be reviewed by a user that belongs to a review tier that can review check requests for that amount.

    a. Click **Setup**.

    b. Optionally specify a value for automatic check request approval.

    c. Click **Add**.

    d. Select users with the Review Operating Check Requests or Review Trust Check Requests access right

    e. Specify the amount for which they can review check requests.

    f. Click **OK**.

    g. Repeat steps **c** through **f** for each additional tier of reviewers.

    h. Click **OK**.

3. Click **Save**.

Document Management

PracticeMaster's Document Management feature makes it easy to store, organize, and access documents from other applications within PracticeMaster. With it, you can specify a single location in which to store documents. You can then automatically name and save documents to this location according to a naming scheme specified by the firm. This prevents documents from becoming "lost in the shuffle" or from being saved to a location that all users can't access. At the same time, PracticeMaster's flexibility allows you to save individual documents to a location you specify outside of the location to which firm-related documents are stored.

Documents can be saved to PracticeMaster from several applications, including Microsoft® Word®, Excel®, and PowerPoint®, Adobe® Acrobat® and Reader®, and Corel® WordPerfect®, via the use of PracticeMaster toolbars designed for each application.

The ***Document Management Guide*** contains full details on the Document Management feature.

Document Assembly

PracticeMaster offers two document assembly options: Word Document Assembly and HotDocs Document Assembly.

Word Document Assembly	Microsoft® Word Document Assembly is built into PracticeMaster and requires no additional software other than Word.
HotDocs Document Assembly	HotDocs Document Assembly requires HotDocs® document assembly software. You can use either Corel WordPerfect® or Microsoft Word with HotDocs.

Tip: Current information regarding which versions of HotDocs integrate with PracticeMaster can be found in Knowledge Base article **R11950**, "Third Party Integration Requirements."

Overview

PracticeMaster's powerful document assembly features let you convert your most frequently used documents into templates. These templates contain variables that represent the information that can change each time the document is assembled, such as the matter's work description. When documents are assembled, the variables retrieve information from the PracticeMaster data files. If the information is not present, document assembly will pause and ask the user to enter the required information. This information is then saved to the document and PracticeMaster simultaneously.

Document assembly is also capable of writing information back to PracticeMaster data files. By inserting "ticklers" into your documents, you can automatically create a calendar entry and generate fee or cost entries.

Document Assembly allows you to include additional files or templates in a document template, making it easy to build a document library.

Word Document Assembly

PracticeMaster has its own document assembly engine that was written specifically to integrate with Microsoft Word. Specially coded document templates in Word are used to merge information from your PracticeMaster data files to create draft documents.

Before documents can be assembled, a document template must be created. Once a document template has been created and saved, you can use the Document Assembly feature to assemble a document within Word. Word will remain open when document assembly is completed, allowing you to edit, save, and print the document as required.

You must install the Microsoft Word Document Assembly Plug-in in order to create and assemble Word document templates.

▶ To install the Document Assembly Toolbar Plug-in

1. Make sure that Microsoft Word is closed.
2. Open PracticeMaster.
3. From the **Integration** tab, select **Toolbar Plug-ins**.
4. Click the **Word** tab.
    a. Click the **Install Assembly Plug-in** button.
    b. A message will appear indicating that the Plug-in has been installed. Click **OK** to close the message.
    c. Click **OK** to close the Toolbar Plug-ins window.

Each user that will be creating templates must install the Word Document Assembly Toolbar Plug-in. Installing the Toolbar Plug-in will copy the necessary files for assembling documents from the PracticeMaster current working directory to your local computer. Once this is done, you can begin creating document templates. Knowledge Base Article **R11447**, "Working with PracticeMaster Document Assembly," contains step-by-step instructions for converting a commonly used form letter to a document assembly template.

More Info: Additional information regarding Word Document Assembly can be found in the following Knowledge Base articles at **support.Tabs3.com**.
- Knowledge Base Article **R11015** - How To Start a New Word Document Template
- Knowledge Base Article **R10667** - Word Document Assembly Advanced Coding Tips

HotDocs Document Assembly

PracticeMaster can also integrate with HotDocs, a third-party document assembly software that works inside your Windows word processor. You can use HotDocs to convert the documents you use most frequently into templates. These templates are then used to automatically produce customized documents for a client. When PracticeMaster is

integrated with HotDocs, the templates retrieve data from PracticeMaster data files, further automating the assembly process.

There are two different interfaces available for assembling documents via HotDocs.

HotDocs Library Interface	Documents are selected in HotDocs via a HotDocs window with special PracticeMaster menu options in the menu bar and right-click menu options.
PracticeMaster Interface	Documents are selected via a HotDocs Assembly window in PracticeMaster.

More Info: Additional information on HotDocs Document Assembly (including instructions on creating HotDocs templates and the document assembly process) can be found in the PracticeMaster Help.

Report Writer

PracticeMaster Report Writer is a powerful utility which allows you to create customized reports for any information stored in PracticeMaster. PracticeMaster provides you with a group of core reports which are referred to as system reports.

More Info: Additional information regarding Report Writer can be found in the ***PracticeMaster Report Writer Guide*** and in the following Knowledge Base articles at **support.Tabs3.com**.

- Knowledge Base Article **R11446** - Working with PracticeMaster Report Writer
- Knowledge Base Article **R10931** - PracticeMaster Report Writer Frequently Asked Questions

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 on our website at:

Tabs3.com/support/docs.html

Sample Reports

Sample report packs are available for all software. These report packs include 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 website at:

Tabs3.com/support/docs.html

Training Videos

Training videos are multimedia resources that walk you through Tabs3 Software 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 products 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 product-related articles. The Knowledge Base requires internet access. 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. Consultants are small independent firms that specialize in the sales of licenses and the 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.

Index

A

Adding
- column layouts 57
- custom filters 61
- fields to existing file definitions 11
- fields to form layouts 15
- indexes 13
- QuickViews 66

Administrator Guide 69, 90
Areas of Practice 43
- files 24, 28
- installing 43
- using predefined Area of Practice templates 43

Attachment 102

C

Calendar 68
- calendar layout 68
- Calendar Plan Templates 76
- Calendar Properties 70
- Calendar Rights 69
- choosing fields to display 72
- customizing event colors 74
- Outlook integration 80
- Task List 75
- Time Zone 75

Calendar Plan
- definition 76

Calendar Plan Templates 76
- and WorkFlows 79
- creating 76
- definition 76
- Key items 76

Calendar Plans 76
- generating 78

Calendar Properties 70
- choosing fields to display 72
- display fields 72
- event colors 74
- General tab 72

Calendar Rights 69
Category Pages
- client category page definition 30
- contact category page definition 30
- journal category page definition 30

Check Request Settings 103
Check Requests 99
- Attachment field 102
- Completed 100
- data entry 102
- example 101
- Inbox 99
- Pay To field 102
- Reimbursable field 102
- Requested By field 101
- review settings 104
- Unpaid 100

Client File 25
Column Layout Editor 56
Column Layouts 56
- adding 57
- Default column layout 58
- definition 56
- restricted column layout 58

Common Client Related Files 24, 27
Configuring
- calendar rights 69

Conflict Checking 81
- reviewing fields included 83

Conflict of Interest 81
- customizing 81
- index file 82
- rebuilding the conflict index 82
- training video 85

Consultants 113
Contact File 26

Convert to Fee
configuring
defining default settings 86
Convert to Fee Settings 86
Creating
Calendar Plan Templates 76
indexes 13
Custom Activity Lists 93
Custom Filters 61
adding 61
Custom Taskbar 93
Customizing Data Files 23
Area of Practice files 28
category pages 30
Client file 25
Common Client Related files 27
considerations for where to store
data 34
Contact file 26
data storage options 23
determining what to store 23
examples 36
Lookup files 29

D

Data Files
customizing 23
Data Storage Options 23
Area of Practice files 28
category pages 30
Client file 25
Common Client Related files 27
considerations 34
Contact file 26
examples 36
Lookup files 29
Designing Forms 14
Document Assembly 107
options available 107
overview 107
Document Management 106
purpose 106
Document Management Guide 106

E

Email Preferences 90
purpose 90
eNote Preferences 96

F

File Definitions 9
adding fields 10-11
Conflict checking information 11
Field tab 10
Field Type 10
Help Text 10
Index tab 12
modifying fields 10
printing for a single file 84
printing for all system files 83
Required definition 10
File Maintenance 9
purpose 9
Filtering Data 59
Filters 59
Active Only 60
adding custom filters 61
Custom Filters 61
optimizing with indexes 62
predefined filters 60
Search box 59
Form Designer 14
adding fields to form layouts 15
purpose 14
toolbar 16
Form Layouts
definition 14

Form layouts
adding fields 15
creating 14

G

Guides 111

H

Help 112
History Tracking 89
purpose 89
HotDocs Document Assembly 107-108
additional information 109

I

Implementing New Fields
example 19
summary 19
Include in Conflict Search 81
Include in Contact Search 81
Include on Conflict Report 81
Indexes
and column sorting 12
creating 13
purpose 12
Installing
Areas of Practice 43
Integration
with Outlook 80

K

Knowledge Base 112

L

List Preferences 51
customization options for List tab 51
for List tab 51
for Matter Manager 52
purpose 51
Row Color 51
Row Height 51
Show Grid Lines 51
Lookup Files 24, 29

M

Matter Manager 92
Custom Activity Lists 93
Custom Taskbar 93
training video 93

O

Outlook
integration with PracticeMaster 80
Outlook Integration Guide 68, 80
Outlook Synchronization 80

P

Pages in Form Layouts 16, 30
Pay To 102
PracticeMaster Search Guide 60
Predefined Filters 60
Active Only 60

Q

Quick Clicks
- Auto Hide mode 47
- customizing Quick Clicks 46, 49
- Manage Quick Clicks 49
- pinning 47
- purpose 47
- training video 48

Quick Guides 111
QuickViews 65
- adding 66
- definition 65
- training video 67

R

Record History 89
Reimbursable 102
Report Writer 110
- purpose 110

Report Writer Guide 110
Requested By 101
Required Fields 10
Resources 111
- consultants 113
- Guides 111
- Help 112
- Knowledge Base 112
- Quick Guides 111
- sample reports 111
- Tabs3 Support 112
- training videos 111
- Website 111

Restricted Column Layout 58
Restricted Fields 11

S

Sample Reports 111
Search Box 59
- using the Search box 59

Smart Tabs 65
- definition 65

Sort Order 63
- methods for sorting 63

Sorting Information 63
- methods for sorting 63

Support 112
Synchronizing with Outlook 80

T

Tab Order
- definition 18
- setting up 18

Tabs3 Support 112
Task List 75
- column layout 75
- index to use for sorting 75

Time Zone 75
Timer Preferences 94
Toolbar Plug-Ins
- Word document assembly 108

Track History 10
Training Videos 111
- conflict of interest searching 85
- Matter Manager 93
- Quick Clicks 48
- QuickViews 67

V

Videos 111
- conflict of interest searching 85
- Matter Manager 93
- Quick Clicks 48
- QuickViews 67

Virtual Fields 31
- definition 31

example 32
Visual Timer Display Properties 95

W

Website 111
Where to Store Data 34
Word Document Assembly 107
installing toolbar plug-in 108
WorkFlows 44
definition 44
examples 44
WorkFlows Guide 44