

# Tabs3 Billing Quick Start Checklist

1.	<b>Set Up Tabs3 Billing</b>	
		Open any Tabs3 Software application and complete the Guided Setup. <b>Tip:</b> In the Quick Launch, search for and select "Customization" to specify additional options.
2.	<b>Add Timekeepers &amp; Rates</b>	
		In the Quick Launch, search for and select "Timekeeper Information." From here, you can add timekeepers and define separate billing rates for each.
3.	<b>Add Clients</b>	
		In the Quick Launch, search for and select "Client Information." Add clients and contacts to Tabs3 Billing. <b>Tip:</b> Set default settings for new clients by searching for and selecting "Customization" in the Quick Launch and select the <b>Client Defaults</b> tab.
4.	<b>Add Fees &amp; Costs</b>	
		In the Quick Launch, search for and select "Fee Entry" or "Cost Entry." You can enter billable time for timekeepers, advanced client costs, and expenses incurred. <b>Tip:</b> Use the  <b>Toggle List</b> button to view a list of transactions.
5.	<b>Run Statements</b>	
		In the Quick Launch, search for and select "Generate Statements." Generate draft and final statements for Tabs3 Billing clients. <b>Tip:</b> Use Pre-Bill Tracking to track the status of your draft statements and launch your final statements.
6.	<b>Update Statements</b>	
		In the Quick Launch, search for and select "Update Statements." Update final statements once they have been approved and sent to clients. <b>Tip:</b> Make a backup before updating statements.
7.	<b>Print Accounts Receivable Report</b>	
		In the Quick Launch, search for and select "Summary A/R Report." Run reports after updating statements.
8.	<b>Add Payments</b>	
		In the Quick Launch, search for and select "Payment Entry." Add payments upon receipt.
9.	<b>Matter Manager</b>	
		In the Quick Launch, search for and select "Matter Manager" or click on a Recent or Pinned Matter. See detailed matter information and balances; launch commonly used features and reports. <b>Tip:</b> Use the <b>PracticeMaster</b> button to launch the PracticeMaster Matter Manager.
10.	<b>Resources &amp; Advanced Features</b>	
		<b><a href="http://www.Tabs3.com/quickstart">www.Tabs3.com/quickstart</a></b> See easy step-by-step procedures for these tasks and learn where to find more information in the Tabs3 Billing Quick Start Guide. <b>Tip:</b> In the Quick Launch, search for and select "Training Videos" to view a list of all available videos.

01/24