


Tab3 Quick Start Guide



Tabs3 Quick Start Guide

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Version 18

Tabs3 Getting Started Guide

Congratulations! You've made the decision to work with Tabs3. Now, let us show you how to get started and where to go when you need more information.

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Before You Start

Before you can get started, you need to install Tabs3.

Installation

If you have not yet installed Tabs3, it's easy to do. Follow the instructions provided in the Installation Guide. The installation guide can be accessed at www.Tabs3.com/support/docs.html or in the Docs folder on the installation CD.

More Info – Installation

The Tabs3 and PracticeMaster Installation Guide

www.Tabs3.com/support/docs.html

Tip: During the installation of the software, you will be asked if you would like to install the Starter Data. We recommend installing Starter Data for a faster start. Starter data includes transaction codes, statement templates, categories, and more.

Starting Tabs3

1. From the Windows **Start** button, point to **All Programs**, click **Tabs3 & PracticeMaster**, and then click **Tabs3**.

2. You will be asked to enter your **User ID** and **Password** at the Logon window. For now, use the **User ID** of **(BLANK)** with no password; simply leave both fields blank and click **OK**. This temporary User ID is the default Manager User ID. You can set up users in System Configuration after you have set up Tabs3.

Setting Up Tabs3

Tabs3 uses two fields named **Key Type** and **Decimal Places** to determine your client numbering scheme.

There are three different **Key Types**: **Numeric**, **Mixed**, or **Alpha**. Typically the client portion of the Client ID is left of the decimal and the matter number is right of the decimal. The **Decimal Places** determines the number of digits for the matter position. Many firms will use 2 or 3 to start with. It can be enlarged later as needed.

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

There are advantages to using a **Numeric Key Type**. When using a **Numeric Key Type**, the primary advantage is that Tabs3 can automatically assign new Client IDs and Matter IDs. When using a **Mixed Key Type**, Tabs3 can automatically assign new Matter IDs, but not new Client IDs. If you are not sure which Key Type to use, we recommend using a **Numeric Key Type**.

You will need to define your **Key Type** and **Decimal Places** before using Tabs3.

Step 1 – Customize Tabs3

The first time you start Tabs3 after installing the software, the Tabs3 Customization window will be opened. The Customization window consists of several tabs. There are a few fields that must be set before proceeding.

Configuring the Tabs3 Customization Window

1. Start Tabs3. The Customization window will be opened automatically.
Tip: If the Customization window does not open automatically, use the **Utilities | Customization** menu to open the window, and see the note following these procedures for more information.
2. On the **Main** tab:
 - a. Specify the desired **Key Type** and **Decimal Places** as described above.


More Info – Customization

[Help Topics](#)

- Press F1 in the Customization window
- Click the Index tab and type “Client ID”

The Tabs3 and PracticeMaster Administrator Guide


www.Tabs3.com/support/docs.html

- b. Specify the **First Month of Reporting Year** field. Most firms use January, but some firms' fiscal year starts with a different month. (*Note: This month is different than the current reporting month.*)
3. On the **Options** tab:
 - a. Specify whether you want statements numbered at the firm or client level in the **Statement Numbering** field. (*Note: We recommend numbering at the firm level so you can easily search by statement number when entering payments.*)
4. On the **Rates** tab:
 - a. If your state requires you to charge sales tax on services, expenses, or advances, select the corresponding check box and enter the tax rate in the Rate 1 field.
 - b. If you would like to charge finance charge on past due balances, select the corresponding check boxes and enter the annual rate in the Rate 1 field (e.g., enter 12.00 if you charge an annual finance charge of 12% per year).
5. On the **Client Defaults** tab:
 - a. Specify the defaults that will be used when adding a new client.
 - b. If assessing sales tax, under the Sales Tax section, select the default sales tax rate.
 - c. If assessing finance charge, select the **Assess Finance Charge** check box, the **Rate**, and the number of **Days** past due before the finance charge will be assessed.
6. Click  to save the changes, then close Customization.

Note: If the Customization window was previously saved, the window will not be opened automatically. Once Customization is saved, the **Key Type** and **Decimal Places** fields will be dimmed and must be changed using the **Change Key Type** program.

Entering Firm Information for Statements & Reporting Purposes

Use System Configuration to enter your firm's name for reporting purposes. System Configuration includes configuration for Tabs3 Billing, PracticeMaster, and Tabs3 Financial Software. Your firm's name and address information is also used for statements.

1. Start Tabs3.
2. From the Application Toolbar, click the System Configuration toolbar button as shown in the image on the right.
3. The System Configuration window will be opened. From the **File** menu, point to **Open** and select **Firm**.
4. Enter your Firm's name and other information.
5. Click  to save the changes.
6. Close the System Configuration window.



Tip: System Configuration is also used to create user accounts and define privileges for individual users who will be using the software.

Tip: See **Statement Designer** for more information on customizing statements.

More Info – Firm Information

Help Topics – Press F1 in the Firm Information window


The Tabs3 and PracticeMaster Administrator Guide

www.Tabs3.com/support/docs.html

Step 2 – Add Timekeepers & Rates

Next, you need to set up timekeepers. Timekeepers are the individuals in your office whose time is billed to clients.

To add timekeepers

1. From the Tabs3 Task Folders, click **Setup** and then click **Timekeeper**.
2. From the **Timekeeper** tab:
 - a. Press **Ctrl+N** to add a new timekeeper number.
Tip: Most firms use “1” for the senior partner.
 - b. Click the drop-down arrow in the **Level** field to select the timekeeper level.
Tip: Additional levels can be defined via **Setup | Timekeeper Level Description**.
 - c. Enter the timekeeper’s name (e.g., John J. Smith).
 - d. Enter the timekeeper’s initials (e.g., JJS).
3. In the **Rates** section:
 - a. Enter the timekeeper’s default hourly billing rate in the **Rate 1** field.
 - b. You can use **Rate 2** for a premium rate, discounted rate, court rate, etc. However, it is best to use **Rate 2** consistently for all timekeepers. For example, if **Rate 2** is the court rate, make sure **Rate 2** is the court rate for all timekeepers. Enter any additional rates as desired.
4. Click  to save the changes.
5. Add additional timekeepers as needed by repeating steps 2 through 4.

More Info – Timekeepers & Rates

Help Topics – Press F1 in the Timekeeper window

Training Videos – Billing Video Library | How Rates Work

Tabs3 Billing Methods Guide – Hourly Billing

Tip: Custom billing rates can be set up at the client level. See **Fee Rate Tables** for more information.

Using Tabs3



Once you’ve set up your timekeepers and rates, you’re ready to add clients and fees, and then run statements.

Step 3 – Add Clients

Clients are added to Tabs3 using the Client program. When you add a client, a contact record is created for the individual or organization. Contact records can be used by other clients and matters.

To add clients

1. From the **Main** Task Folder, click the **Client** icon.
2. **Address** tab:
 - a. Press **Ctrl+N** to add a new client.
 - i. The New Client Record window will be displayed. Select the desired option for the Client ID you want to use to identify the client.
 - ii. Click **OK**.

- b. Enter the **Client Name** (e.g., Jones/Mary T. or United Insurance Company).
 - c. A Contact Information window will be displayed allowing you to enter the address and phone information for the contact. Enter the desired information and click  to save the changes.
 - d. After saving the contact information, you are returned to the **Address** tab of the client file with the contact information already filled in.
3. On the **Setup** tab, specify the desired **Billing Category** and **Primary Timekeeper**.
 4. On the **Billing Preferences** tab, under **Statement Delivery Options**, double-click the first record in the table. This is where you designate whether the client will receive a printed statement and/or an e-mail statement.
 5. Click **OK** to close the Bill To Record window and then click  to save the changes.

More Info – Clients & Contacts

Training Videos – Clients & Contacts Video Library (8 videos)

Help Topics – Press F1 in the Client or Contact window

Tip: When entering information for a potential client, enter the information in a Contact record. Then, when the contact becomes a client, use the contact record to populate the client record. You can access the Contact file using the **Contact** icon on the **Main** or **Client** Task Folders.

Step 4 – Add Fees & Costs


Fees and costs are entered using the Fee and Cost programs.

To add fees

1. From the **Main** Task Folder, click the **Fee** icon.
2. By default, the last accessed client ID is used for the default. Select the desired client by doing one of the following:
 - Press *Enter* to accept this client ID.
 - Type in a different client ID.
 - Click the drop-down button to select a different client from the Client Lookup window.
3. Press *Enter* in the **Reference** field to add a new fee.
4. Select the desired **Timekeeper**.
5. Enter the desired **Date**.
6. Click the drop-down button in the **Tcode** field to select the desired transaction code. Transaction codes represent a type of service or activity.

Tip: Tcodes are optional. If desired, use tcode 1 and type your own description.

Tip: Right-click the **Tcode** field and select **Edit Transaction Code** to add or edit transaction codes.
7. Enter the **Hours Worked**. For example, 15 minutes would be entered as .25 hours.
8. After selecting the desired transaction code, the default description for that transaction code will be used in the **Description** field. Edit this field as desired.

Tip: Use transaction codes or Tabs3 text macros to create commonly used phrases or paragraphs to aid in faster data entry.
9. Click  to save the changes.

More Info – Fees


Training Videos – Adding Fees

Recap of Hours

Help Topics – Press F1 in the Fee window



Detail vs. Rapid Entry Mode

The Fee Entry program has a detail mode and a rapid mode. The steps above use the fields in Rapid mode. Let's take a look at Detail mode.


- While in the Fee window, click the **Detail/Rapid**  button.

When in Detail mode, additional fields are shown above the **Description** including the **Hours to Bill**, **Rate**, and **Amount** fields. Furthermore, additional fields are shown below the **Description** field including **Category**, **Bill Code**, **Rate Code**, **Status**, **Sales Tax**, **User ID**, and **Date Entered**. When you are in Rapid mode, the text **Rapid Fee** is shown in the title bar.

Fee Entry List

You can see a list of fee transactions by using the **Toggle List**  button (or *Alt+G*). Notice that the transaction you saved is shown in the list. If you want to edit the transaction, simply double-click the entry to retrieve it in the data entry form. After making any changes, click  to save the changes.

Recap of Hours

While in the Fee program, click the **Recap of Hours**  button to view a Recap of Hours window. This window shows the cumulative hours worked for the specified timekeeper on any given day. This makes it easy for timekeepers to see whether any time entries are missing.

Tip: From the **Transactions** Task Folder, click the **Recap of Hours** icon to run a Recap of Hours Report for any time period. This report shows a calendar with the number of billable and non-billable hours for each day by timekeeper.

Verification Lists

When you close the Fee program, you will be given the opportunity to print a Verification List. Verification Lists are optional and include a list of the transactions that were entered, changed, or deleted during the session. Verification Lists are also available for the Cost and Payment data entry programs.

Working with Costs

In Tabs3, costs are classified as expenses or advances. Expenses are “soft” or “indirect” costs, whereas advances are “hard” or “direct” costs. Costs are classified differently for accounting and tax purposes. Examples of expenses include photocopy expenses, long distance, postage, etc. Examples of advances include filing fees, witness fees, medical costs, etc.

Tip: You can show expenses and advances separately on the statement, or you can combine them.


To add costs



1. From the **Main** Task Folder, click the **Cost** icon.
2. Enter the desired client ID.
3. Press *Enter* in the **Reference** field to add a new cost.
4. Enter the desired **Date**.

More Info – Costs

Training Videos – Adding Costs

Help Topics – Press F1 in the Cost window

5. Click the drop-down button in the **Tcode** field.
 - a. Notice that the list of transaction codes is different for costs. This is because each transaction code is assigned a Fee, Expense, or Advance attribute when it is defined. Notice the **Type** column in the Tcode Lookup window shows E or A, thus indicating whether the tcode is an expense or advance.
 - b. Select the desired tcode.
6. Notice a **Units** and **Rate** field is available. These fields can be used for mileage or photocopies, for example.
7. Enter the **Amount**.
8. Enter the **Description**.
9. Click  to save the changes.

Like the Fee Entry program, you can use the **Detail/Rapid**  button to toggle between Detail and Rapid Mode. You can use the **Toggle List**  button to hide or display a list of costs at the bottom of the window. When you exit the Cost Entry program, you will be given the option to print a Cost Entry Verification List.

Step 5 – Run Statements

Once all fees and costs have been entered, you can run a statement for the client.

To run a statement

1. From the **Statements** Task Folder, select **Generate Statements**.
2. On the **Client** tab, specify the desired client for the beginning and ending **Client ID**, or leave these fields blank to print statements for all clients.
3. On the **Transactions** tab, you can specify a cut-off date for fees and costs if desired.
4. On the **Options** tab, select **Draft**. We want to run a draft statement for review purposes.
Tip: Select the **Print Reference Numbers** check box to include reference numbers on statements to assist with selecting individual transactions for editing purposes.
5. Click **OK**.
6. You can either print or preview the statement. Click **Preview** to review the statement on screen.

When reviewing the statement in the Preview window, you can easily modify any transaction by moving your mouse over the transaction description, then clicking it when it turns yellow. After saving any changes to the transaction, you will be returned to the statement. Click the **Refresh** button at the bottom of the Preview window to refresh the statement with your changes.

More Info – Statements	
Training Videos	
<ul style="list-style-type: none"> • Statements Overview • E-mailing Statements • Customizing Statements 	
Help Topics	
<ul style="list-style-type: none"> • Type Statements on the Index tab and select Overview • Press F1 in the Generate Statements, Statement Designer, and Statement Templates windows 	

Changing the Statement Format

Statement format is controlled by statement templates. Each client is assigned a statement template for draft statements and one for final statements. Tabs3 also includes a Statement Designer that provides the ability to create customized page layouts for your Tabs3 statements. Once designed, page layouts can be applied to one or more statement templates.

Tabs3 Statements Guide

Tabs3 Statement Formatting Guide

Knowledge Base Article R11338 – E-mailing Tabs3 Statements
<http://www.support.Tabs3.com/main/R11338.htm>

Let's say after reviewing the statement, you want to change the format of the fees so it shows hours and rates. The statement format can be changed via the Client file. However, if you still have the statement displayed in the Preview window, you can open the Client file by moving the mouse over the **Account No.** at the top of the statement and clicking it when it turns yellow.

To change the statement format

1. Open the Client File by doing one of the following:
 - When previewing a statement, mouse over the **Account No.** at the top of the statement and click it when it turns yellow.
...Or...
 - From the **Main Task Folder**, click **Client**.
2. Click the **Statement Options** tab.
3. Right-click in the **Draft Template** field (or **Final Template** field) and select **Edit Statement Templates**.
4. Click the **Fee Format** tab.
5. Under the **Include** section that is to the right of the **Fee Format** section:
 - a. Select the **Rate** check box.
 - b. In the **Hours** drop-down list, select **Detail**.
6. After making all changes to the statement template:
 - a. Press **Ctrl+S** to save the changes.
 - b. Close the Statement Template window.
 - c. Close the Client window.
7. Rerun the statement. If you are still in the Preview window, simply click the **Refresh** button to rerun the draft statement.

Tip: Keep in mind that changing the statement template affects *all clients* that use that template.

Generate a Final Statement



Once you approve the draft statement, you must run a final statement. This can be done the same way the draft statement was run by changing the Statement Type from **Draft** to **Final** on the **Options** tab. Or, it can be run using the Pre-Bill Tracking window.

Generating a Final Statement via Pre-Bill Tracking

1. From the **Statements Task Folder**, click **Pre-Bill Tracking**.
2. Highlight the desired client ID.
3. Click the **Reviewed** button at the bottom of the window to indicate the statement was reviewed.
4. Click the **Final Statements** button to generate a final statement.

5. Click **OK**.

Pre-Bill Tracking

The Pre-Bill Tracking window makes it easy to track the status of statements. When draft statements are run, a statement record for that batch of statements is added to the Pre-Bill Tracking window. As draft statements are reviewed, you mark them as reviewed or on hold. You can then easily run final statements directly from the Pre-Bill Tracking window for all statements that have been reviewed. The Pre-Bill Tracking window provides a centralized location that shows the status of all pending statements.

Tip: Some firms prefer to use Detail Work-In-Process Reports instead of draft statements to review information before billing. Running Detail Work-In-Process Reports also adds statement records to the Pre-Bill Tracking window.

More Info – Pre-Bill Tracking

Training Videos – Pre-Bill Tracking Video

Help Topics – Press F1 in the Pre-Bill Tracking window

Tabs3 Statements Guide – Tracking Statements

Step 6 – Update Statements

Now that the final statement has been generated, you must update the statement using the Update Statements program. This process finalizes the statement and sends the information to accounts receivable and other productivity reports.

To update a statement

1. From the **Statements** Task Folder, click **Update Statements**.
2. If prompted to make a backup, click **Yes**.
3. After the backup completes, the Update Statements window will be displayed. Specify the desired client ID you want to update, or leave the fields blank to update all final statements for all clients.
4. Click **OK**.

Step 7 – Print Accounts Receivable Report

When statements are updated, the information is updated to accounts receivable and other reports. Let's look at an accounts receivable report.

To print a Summary Accounts Receivable Report

1. From the **Accounts Receivable** Task Folder, click **Summary A/R Report**.
2. On the **Client** tab, specify the desired client (*or leave the Client ID fields blank to select all clients*).
3. Click the **Options** tab and select any desired options.
4. Click the **Format** tab and select any desired options.
5. Click **OK**.

More Info – Reports

Training Videos

- Reports Overview
- Detail and Summary Accounts Receivable Reports

6. Click **Preview** when the Print Summary Accounts Receivable Report window displays.


7. After you've finished viewing the report, click the **Close** button at the bottom of the Preview window. You will be returned to the report window allowing you to run another report if desired.

Help Topics – Press F1 in the Accounts Receivable Report window

Tab3 Sample Reports

Tip: There are other accounts receivable reports available on the **Accounts Receivable** Task Folder.

Tip: After clicking the Task Folder icon for any report, press F1 while in the criteria selection window

for the report. In the heading bar of the help topic, click the  icon. This icon opens the Tab3 Report Pack, which shows an example of the report and provides detailed information for every item on the report.

Step 8 – Enter Payments

Upon receipt of a client's payment, you need to enter a payment transaction.

To add payments

1. From the **Main** Task Folder, click the **Payment** icon.

2. Enter the desired Client ID.

Tip: Notice that the client's accounts receivable balance is shown at the bottom of the window after specifying the Client ID.


3. Press *Enter* or *Tab* in the **Reference** field to add a new payment.

4. Enter the desired **Date**.

5. Click the drop-down button in the **Tcode** field and select the desired tcode.

6. Enter the **Amount**.

7. Enter the **Description**.

8. Click  to save the changes.

More Info – Payments

Training Videos – Adding Payments, Credit Card Processing, Receipt Allocation, Payment Types, Method to Apply Payments, Manual Payment Allocation

Help Topics – Press F1 in the Payment window


Once the payment is entered, the accounts receivable automatically reflects the payment. However, in order to process the payment, a final statement must be run and updated that includes the payment. This typically occurs when the next statement for the client is run. If no other work will be performed for the client, then you can run a payment-only statement.

Tip: You can run a report of all cash receipts (*Reports | Management | Cash Receipts Report*).

Step 9 – Client Manager

The Tab3 Client Manager shows client contact information, balance due information, work-in-process information, and the date of the last statement and payment. You can launch the reports you run most often for individual clients. The PracticeMaster button launches the Matter Manager in PracticeMaster, which provides quick access to other case related information.

To launch the Client Manager, do one of the following:

- From the **Main Task Folder**, click the **Client Manager**  icon
- From the **File Menu**, select **Client Manager**
- Press **Ctrl+M**



Resources

This *Getting Started Guide* provides you with the information you need to start using the software. There are many other resources available to help you learn the software.

Training Videos

Tabs3 and PracticeMaster include numerous training videos to help you learn the software. Training video libraries can be accessed via the software from the **Help | Training Videos** menu option.

Help

Help is installed with the software and is easily accessed by pressing F1, by clicking the  button, or by selecting the **Help | Help Topics** menu option. Help includes detailed information regarding specific programs. Clicking the  button opens Help for the window you are currently using. Many times, reading the appropriate Help topic may be the fastest way to find your answer.

Guides

There are multiple Tabs3 guides installed with the software in PDF format. Shortcuts are created during installation. From Tabs3, select **Help | Documentation** for a list of all available Tabs3 and PracticeMaster Documentation. These guides include information on basic setup and use of the software. The guides can also be accessed via our Web site at <http://www.Tabs3.com/support/docs.html>.

Tabs3 Reports

The Tabs3 Report Pack is installed with the software in PDF format along with the guides. Tabs3 has dozens of reports and this document makes it easy to see examples of each report. Many firms will print this Report Pack as a reference guide for the various reports to help familiarize them with what is available.

Knowledge Base

Tabs3 and PracticeMaster publish an extensive Knowledge Base on the Internet with advanced information. It contains information on Error Troubleshooting, Networking & Windows Issues, “How To” articles, and product-related articles. You can access the Knowledge Base via the software from the **Help | Internet Resources | Knowledge Base** menu option or from your Internet browser at www.support.Tabs3.com/.

For example, as a new Tabs3 user, you may want to learn more about Tabs3. Knowledge Base Article [R11103](#), “Tabs3 Frequently Asked Questions,” provides numerous questions and answers on various areas of the software. Although the Help provided with the software also includes much of this information, you may find that the comprehensive focus of many Knowledge Base articles may be quite helpful for certain subjects.

Technical Support

Tabs3 and PracticeMaster provide some of the best technical support in the industry. Service to our customers is extremely important to us—so much so that our motto is:

Reliable software. Trusted service.

Technical Support is provided at no charge with a maintenance plan 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 Technical Support staff at (402) 419-2210.

Tabs3 Resellers & Consultants

Tabs3 and PracticeMaster products are available through a national network of over 250 resellers and consultants. Those resellers and consultants are small independent firms that specialize in the sales, installation, training and support of billing, financial, and practice management software for law firms. By having resellers and consultants service all 50 states, you can work directly with a local person familiar with Tabs3 and PracticeMaster software, who can provide personalized on-site installation, training, and support services. Visit our Web site at www.tabs3.com/resellers/resellers.html for a reseller near you or contact our Sales staff at (402) 419-2200.

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