



User Newsletter

Sample Edition

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Sample User Newsletter:

Welcome!

Welcome to the family of thousands and thousands of professional firms using Tabs3 and PracticeMaster software. The User Newsletter informs you and helps you better utilize the features of Tabs3 and PracticeMaster products. The following is a sample of some of the articles, questions, and answers found in a typical User Newsletter.

Getting Around

This front page of the newsletter will normally contain a brief summary of all of the issue's contents, which can be handy if you're looking through archive articles looking for something specific.

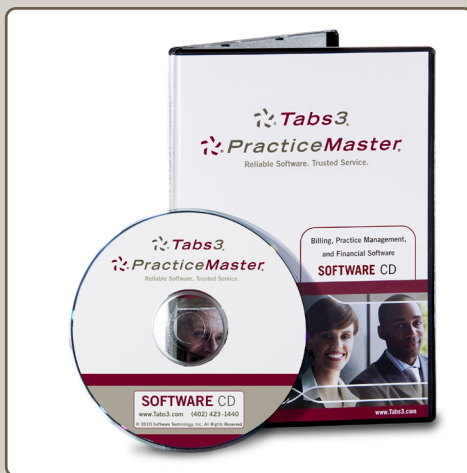
In the left column on every page of the newsletter is the "In This Issue" table of contents box. Not only does this list the articles, but each article title is also a hot link that will jump you directly to that article's page when you click on it. Articles that span more than one page will also include hot links to jump to the next section.

Some articles will also contain URLs, references to Knowledge Base articles, e-mail address, etc., that will be highlighted by bold, red text. These are also clickable links.

Benefits of Maintenance

When you purchase a Tabs3 or PracticeMaster license, you receive a one year maintenance agreement. The maintenance agreement gives you access to the monthly user newsletter and archived newsletters on our Web site. It also entitles you to free technical support, instead of paying \$50 for every 15-minute increment, and cheaper upgrades – apply the original cost of your software license towards the purchase of a larger system as your firm grows. Firms with a maintenance plan also receive free software updates. Because the price of maintenance is **less than half** the cost of a software update, staying on maintenance truly is the best value for your firm.

For answers to questions about Tabs3 and PracticeMaster maintenance plans, or to renew a maintenance plan, call (402) 419-2200 or e-mail sales@tabs3.com.



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Feature Article:

Does Your Backup Strategy Meet Your Needs?

There are many facets to making a good, reliable backup. Does your current backup strategy meet your needs? It may be time to revise your backup routine to include new information, and maybe a new location.

How often do you make a backup of your important information? Weekly? Monthly? Never? The best way to determine how often you need to make a backup is to ask one question: If your firm became a victim of a natural disaster, what would be a reasonable amount of data to manually re-enter? If you are okay with re-entering a month's worth of information, a monthly or weekly backup may work well for you. If you enter a large volume of information each day, a nightly backup may work better for your firm. Based on your answer, this question will help you make a sound decision regarding your backup routine.






Once you have decided on a frequency for your backups, the next consideration will be the location. Wherever you choose to store your backup media, be sure there is enough space to hold several copies of the information you intend to back up. It is a good idea to store more than one backup to be sure that an error-free restore is possible. These backups can be kept on-site, off-site, on the Web, or using any combination of these options. With so many different kinds of backup media, you will need to decide what is best for your firm.

With off-site backups, you will be able to create a backup and store it separately from the live data. This ensures protection against theft, hardware failure, fire, and most natural disasters. Data can be stored on a DVD, CD, external hard drive, jump drive, or any other external media. On-site backups are created and stored at your firm. These may not protect you from natural disasters or theft, but with an on-site external backup you would still be protected from hardware failure. Finally, Web backups are gaining popularity. Storing a virtual copy of your important data files on a secure Web site can alleviate each of the threats listed above. However, when storing information on the Web or other server, it is critical that this information is secure and **not** accessible to others outside your firm. This will ensure that you maintain client confidentiality, abide by the license agreement and software copyright, as well as protect your firm from liability issues. In the end, where you choose to store your external backup will be determined by your available resources and location.

Now that you have decided frequency and location of your backups, it is time to review the content of these backups. This takes us back to the question in the second paragraph – What would be a reasonable amount of data to manually re-enter? This includes reinstalling and updating software, along with re-entering the data within these programs. You will want to look at the backup requirements for each program that you regularly use and figure out their recommended backup strategies. The Tabs3 and PracticeMaster software suggested backup strategy is provided in the Knowledge Base article **R11213**, "Backup Strategy." This article outlines how to successfully back up the Tabs3 and PracticeMaster program and data files and explains what is backed up when using the internal backup program.

Continued on Page 3 >>

Backup Checklist

-  Frequency
-  Storage Location
-  Content
-  Time of Day
-  Schedule Periodic Tests

Microsoft[®]
GOLD CERTIFIED

Partner

Software Technology, Inc., is a
Gold Certified Partner in the
Microsoft Partner Program

[Read the full press release here.](#)

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Tabs3 has partnered with Nelco to offer you checks and forms that are guaranteed to work with **Tabs3 Accounts Payable** and **Trust Accounting Software**. Nelco also offers a wide variety of supplies essential to running your firm.

Give our dedicated Tabs3 Representative, Andy Thompson, a call at 800.266.4669 ext. 4333.

www.nelcosolutions.com/tabs3/

30% off Get 30% off of your first order!
Refer to Promo Code 31L when ordering to receive your discount.

Backup...Continued

The time of day you decide to make the external backup is determined by its content and the software you currently use. It is important to note that an external backup of the Tabs3 working directory will **not** be reliable while users are logged into the software. However, if you currently use the Platinum software, you can make a HotBackup of the data files while users are in the software. This allows you to make an external backup of the HotBackup folder whenever a HotBackup is not currently running, and back up the working directory less frequently to ensure you have program files you can restore in the event of a disaster. If you do not have the Platinum software, you can still create an external backup of the Tabs3 working directory, but it must be done when no one is logged into the software, typically outside of working hours. This ensures that your backup contains complete copies of all data and program files. Many external backup programs can be automated to run during the night and on weekends.

The final and most overlooked step of creating a backup routine is to test your backups regularly. Your backups will not be worth your time and energy if they cannot be restored. You may want to consider speaking with the person in charge of maintaining your backups and make sure there is a good understanding of how to restore a backup when necessary. This person can also be the one to test the backup regularly by restoring to an alternate directory. By confirming that your backup can be restored without errors, you have proven that the backup system is working correctly.

Whether you choose to back up weekly or daily, having a dependable backup is essential to the well-being of your firm. Therefore, it is important to understand how often a backup must be made, where the backup is stored, and what must be included in such a backup. If you have concerns about whether or not you are properly backing up the Tabs3 and PracticeMaster data, contact your local reseller or consultant, or our Technical Support department at (402) 419-2210. Whatever you do, don't wait until it's too late to ensure your backup strategy is reliable.

KB Corner:

Frequently Asked Questions

From time to time, you may need answers to some common questions regarding every program. Although the User Newsletter is a great source of Frequently Asked Questions (FAQs), we know every question cannot be included in every newsletter. For your convenience, we have made FAQ articles regarding each major program available to you in easy-to-find Knowledge Base articles.

- **R11103** – Tabs3 Frequently Asked Questions
- **R10588** – PracticeMaster Frequently Asked Questions
- **R11106** – Tabs3 Trust Accounting (TAS) Frequently Asked Questions
- **R11104** – Tabs3 Accounts Payable (APS) Frequently Asked Questions
- **R11105** – Tabs3 General Ledger (GLS) Frequently Asked Questions
- **R11405** – Platinum Frequently Asked Questions

In addition to the general FAQ articles, there is also a set of FAQ articles for year-end. The articles listed in **R10429**, "Year-End Overviews for Tabs3 Software Products," provide procedures and frequently asked questions specifically directed at year-end situations.

You can find our Knowledge Base at www.support.Tabs3.com for more information.

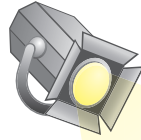
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Product Spotlight:
PracticeMaster Basic



What is PracticeMaster software? It is the flexible practice management software that comes free with your purchase of a Tabs3 Billing Software license. A single user license of PracticeMaster Basic is provided with every Tabs3.

Practice management is much more than the personal calendar and contact lists that you can find in any e-mail software. PracticeMaster Basic features advanced conflict searching and contact management, along with a firm-wide calendar that can include client information. The Conflict of Interest Search in PracticeMaster utilizes search indexes that you can set up to control the order in which fields are searched, allowing it to run significantly faster. It offers more versatility regarding what can be indexed; for example, you can set up a permanent index to control the sort order of any data file in PracticeMaster. It also allows you to control which fields will be searched, and therefore which fields won't be searched, for conflict information.

You can use the PracticeMaster Matter Manager to view your appointments, contacts, correspondence, and billing information for each matter in one convenient location. If you use Outlook, don't worry. PracticeMaster integrates with Microsoft® Outlook®. You can synchronize your calendar and contacts. You can also turn e-mail messages into appointments, fees, and journal records linked to your client and contact files.

Once you see how PracticeMaster Basic helps to organize your practice, upgrade to PracticeMaster Premier for even more features. In Premier, you can organize your client and matter information, perform document assembly (which allows you to create templates for the documents you use most, and then compile them using information stored in PracticeMaster), create and use calendar plan templates (which allow you to create templates of data ranges based on statute requirements, and then apply these schedules to client calendars), and more. A full comparison of the differences between PracticeMaster Basic and PracticeMaster Premier is provided on our Web site at www.Tabs3.com/products/PracticeMaster/pm_comparison.html.

Don't wait! Give PracticeMaster a try! Step-by-step instructions to install your free copy of PracticeMaster Basic are available in the Knowledge Base Article **R11027**, "Installing Your FREE Copy of PracticeMaster Basic." For more information regarding your free copy of PracticeMaster Basic, please contact your local reseller or Technical Support at (402) 419-2210.

**Tabs3 and PracticeMaster win
Law Technology News® awards!**



Tabs3 and PracticeMaster were recognized as Top Software Products for the **Eighth Year in a Row!**

 [Read the full press release here.](#)



Accessing Matter Information

Use the Matter Manager to see detailed information for a client's matter. In PracticeMaster, press Ctrl+M to automatically open the Matter Manager. In the Record Type Selector, select All Activity. This will display all journal, calendar, fee, and other related records in the list on the right.

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Questions and Answers:

Tabs3 Billing Software

Getting Started

I need to get Tabs3 up and running as soon as possible and I just don't have time to read the entire manual cover to cover at this time. What should I do first?

Read Chapter 1, Introduction & Getting Started, and Chapter 2, Using & Setting Up Tabs3, of the Tabs3 manual! Step-by-step procedures to begin using Tabs3 are outlined in these chapters. Referrals to specific sections in the manual and Help are included for quick reference. This includes page references, such as starting on page 16 for information on how to select the Customization options.

Statement Customization

How can we add personal messages to our statements?

Tabs3 allows you to define messages at the system level, at the statement template level, and at the client level.

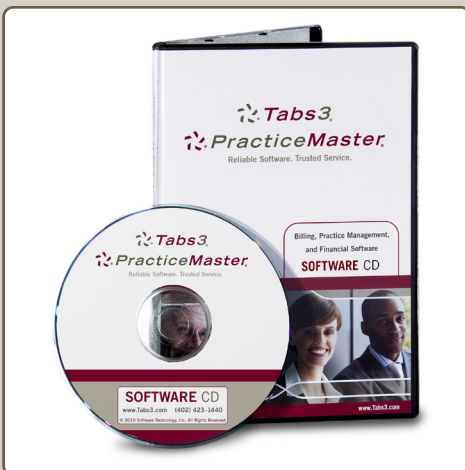
- A system level message can be added on the **Headings** tab of Statement Customization (**Statements | Statement Setup | Statement Customization**). Up to 250 characters of text can be entered on this tab to print at the end of all billing statements.
- Template notes can optionally be set up for each statement template (**Statements | Statement Setup | Statement Templates**). On the **General** tab, select the desired Beginning Note and Ending Note.
- Unique text can be entered for each client in the **Ending Statement Notes** field on the **Statement Options** tab of the Client file. Similar messages can be added to the beginning of statements for additional flexibility.

Billing Address Options

My client would like his statement sent to his e-mail address and a third-party address for billing purposes. How can I do this?

To accomplish this, look up the client in the Client file and confirm that an e-mail address is displayed on the **Address** tab. If not, click the hyperlink text next to the **Contact Name**, enter an e-mail address for his contact record, and save the contact record. In the Client file, select the **Billing Preferences** tab. Double-click the record listed in the client's Statement Delivery Options table. Clear the **Mail Statement** check box and select the **E-mail Statement** check box. At the bottom of the Bill To Record window, confirm that his e-mail address is displayed, select a valid e-mail template, and click **OK**.

To set up an additional Bill To recipient, on the **Billing Preferences** tab of the Client file, click the **Add** button. In the **Bill To Name** field, select the desired contact or add a new contact. Select whether the contact will receive statements via mail or e-mail, and set up the associated options, such as the address to be printed on the statement, whether an attention line will be included, etc. You can press the **F1** key to see a description of each field in the Bill To Record window.



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**Questions and Answers:
PracticeMaster Software**

Calendar Colors

In the calendar, how can I change the colors of the Events?

You can change the color of events using the Calendar Properties program (**Calendar / Calendar Properties**). The Event Colors section on the **General** tab determines the colors displayed for event calendar records in the Calendar window and the Graphical Calendar Report.

When selecting the **Event Colors are based on User ID information** option, the colors specified for a User ID in the System Configuration program are used. Therefore, each user can display his or her own color.

If you select the **Event Colors are based on Calendar Code** information option, the colors specified in **Text Color** field of the Calendar Code file will be used. Therefore, each calendar code can display its own color. If a calendar record is not assigned a calendar code, the colors specified in the **Default Event Color** field of Calendar Properties are used.

If you select the **Use default colors for all events** option, the colors in the **Default Event Color** field are used for all events.

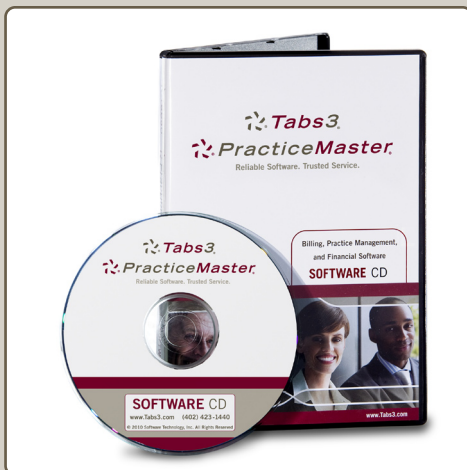
Go ahead and experiment with these different options. They can be changed at any time.

Conflict of Interest Searching

How do I find out which fields are searched in the Conflict of Interest Search?

This setting is shown for each field when you print a file definition in File Maintenance (**Maintenance / File Maintenance**). In the File Maintenance window, right-click the desired file and select **Print File Definition**.

If you review the settings and decide to add fields to the Conflict of Interest Search, in File Maintenance, select the desired file and click **OK**. From the **Field** tab, highlight the desired field in the list of Field IDs and select the **Include in Conflict Search** check box. When you have done this for every desired field, click **Done**. To use the newly-selected fields, you must reindex the search files. From the **Rebuild Index** tab of the Search Settings window (**Search / Search Settings**), select the **Conflict/Contact Index** check box and click the **Rebuild Now** button.



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Questions and Answers:

General Ledger Software

Journal Entries for Prior Periods

Can journal entries be entered for a prior month after the month has been closed?

Yes, journal entries can be entered for any prior month in the current fiscal year or any month in the last two fiscal years. The date of the journal entry determines the month to which it is posted. As journal entries are made, the balance for the account is automatically updated. Journal entries made for any prior period automatically adjust balances through the current fiscal month. Journal entries cannot be made to a future month (i.e., a month later than the current fiscal month). If journal entries are made for a prior month, you may want to reprint your financial reports for that month and all subsequent months.

Multiple Data Sets

We maintain several sets of books for our firm and its subsidiaries. Can we do this in GLS?

Yes, GLS allows you to configure up to 999 different sets of data. Each set of data is referred to as a GLS client. Setting up multiple GLS clients allows you to easily keep separate books for multiple entities on the same computer. This is accomplished by storing additional GLS clients' data in separate subdirectories within the current working directory.

Questions and Answers:

Accounts Payable Software

Partial Payments

Can I print a check through APS to pay only part of an invoice?

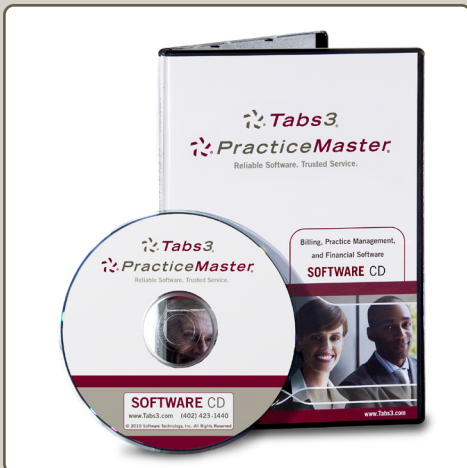
Yes. Enter the portion of the invoice that you want to pay in the invoice's **Amount to Pay** field. When a check is printed, two things occur: a new invoice record is created and the original invoice record will be changed. The new invoice record will reflect the partial amount that was paid and will include the **Check #** and **Date Paid**. The **Invoice Amount** on the original invoice record will be changed to reflect the remaining amount of the invoice. This remaining amount will be shown in both the **Invoice Amount** and **Amount to Pay** fields. The original invoice record will also include the **Last Check #** used to pay a portion of the invoice and the invoice's original amount.

Miscellaneous Vendors

What are miscellaneous vendors?

Miscellaneous vendors are vendors that will be paid one time only. When you want to enter an invoice or a manual check for a vendor that you do not want to add to the vendor file because the vendor will be used only once, then use a miscellaneous vendor. A miscellaneous vendor is a vendor that has the **Miscellaneous Vendor** check box selected in the Vendor file. When adding an invoice or manual check for a miscellaneous vendor, you will be able to enter the vendor's name, address, city, state, and zip code.

Do not use a miscellaneous vendor when you need to accrue 1099 information for the vendor or if you want to retain individual productivity figures for the vendor. You cannot combine invoices for miscellaneous vendors. Additionally, recurring entries cannot be added for miscellaneous vendors.



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Thank You!

We hope this sample User Newsletter has been helpful and informative. To ensure that you are provided access to monthly issues of the User Newsletter as well as future updates of the software and free technical support, fill out and return your Registration card. If you have any questions regarding the software, the User Newsletter, or our annual maintenance program, please give us a call at (402) 419-2200.

Questions and Answers:

Trust Accounting Software

Specifying a Check Number

When entering check transactions, what should I enter for the check number?

The answer depends on whether the check has already been printed. Leave the **Check #** field at the default of "0" (zero) if you will be using the Print Checks program to print the check transaction. If you are entering a check transaction for a check that was not printed by TAS (i.e., the check was written by hand), the check number used for the check should be entered.

Interest & Service Charges

The bank account we use for our trust accounts accrues interest and also incurs bank charges. How do I deposit or withdraw money from the bank account without affecting my trust accounts?

Set up a new trust account for the bank account and call it "Administrative Account". When you need to enter interest deposits or service charge transactions without affecting any of the other trust account balances, enter the transactions using the Administrative Trust Account for the bank account.

Announcement:

Free Webinars!

You are invited to two free monthly Webinars!

Understanding Platinum: The Highest Level of Tabs3 and PracticeMaster Software

Philip Allendorfer, Director of Development for Tabs3 and PracticeMaster, will discuss the benefits of the Platinum version of Tabs3 and PracticeMaster, and explain the technology behind Platinum features, such as Report Accelerators, HotBackup, Transaction Processing, and network compatibility. For the event date and time, or to register, visit: <http://platinumversion.eventbrite.com/>.

Accepting Credit Cards

Bruce Policky, Product Manager for Tabs3 and PracticeMaster, will show you how to save time and get paid faster by allowing your clients to pay with credit cards. He will also demonstrate how to process credit card payments in Tabs3 and trust deposits in Tabs3 Trust Accounting, and discuss how the system is designed to accommodate some state bar association guidelines for accepting credit cards for trust deposits. For the event date and time, or to register, visit: <http://creditcards.eventbrite.com/>.