

Version 12 Conversion Instructions for Converting Version 8, Version 9 or Version 10 Systems

These instructions are used to convert the following Tabs3 Billing, PracticeMaster, and Tabs3 Financial systems to Version 12:

- System Configuration Version 10, 9 or 8
- PracticeMaster Version 10
- PracticeMaster Palm Software Version 10
- Tabs3 Billing Software Version 10, 9 or 8
- Tabs3 General Ledger Software (GLS) Version 10, 9 or 8
- Tabs3 Accounts Payable Software (APS) Version 10, 9 or 8
- Tabs3 Trust Accounting Software (TAS) Version 10, 9 or 8
- Tabs3 Remote Entry Software Version 10, 9 or 8
- Tabs3 Palm Software Version 10
- Tabs3 Billing Custom Report Writer Version 10, 9 or 8
- Tabs3 General Ledger Custom Report Writer Version 10, 9 or 8

The conversion process will convert **all** of the above systems at the same time. Check boxes are included in these conversion instructions when the same task must be performed for more than one system. If a particular step applies to systems that your firm is not converting, simply skip that step.

We recommend reading through all of these instructions before proceeding. These instructions cover all of the issues that have been encountered during the course of our testing. Many of these issues will probably not even apply to your firm. However, all firms converting the software are advised to perform the steps listed in order to isolate any potential problems and address them before converting.

Because there are many steps involved, it may not be practical to perform all pre-conversion steps at the same time. You can perform the pre-conversion steps at any time before converting.

Some computers that were able to successfully run Version 8 or 9 may not be able to run Version 12. Details are provided in the **Notes** section of these instructions.

Your local Tabs3 reseller as well as our Technical Support Representatives are available to assist you with any questions you may have. Please call your local reseller or call us at (402) 423-1440 if you have any questions regarding this conversion.

Note: If you are converting Case Master Version 2.2 or software with a version different than the versions listed above, call us for a different set of installation and conversion instructions.

Notes

OLDER WINDOWS OPERATING SYSTEMS: Version 12 will not run under Windows NT 3.5.1, Windows 3.1, or Windows 32S.

WINDOWS 95 SYSTEMS: Version 12 cannot be run under Windows 95 operating systems. If you have computers accessing our software under Windows 95, those computers will no longer be able to use our software once it has been updated to Version 12.

WINDOWS NT4 SYSTEMS: Version 12 cannot be run under Windows NT4 operating systems. Although the Tabs3 and PracticeMaster software systems can be installed on an NT4 server, they must be started on a Windows XP/2000/Me/98 workstation because of the enhanced graphics used. (*Exception: STI Server can still run under Windows NT4.*)

WINDOWS 98/Me SYSTEMS: Windows 98/Me is still supported with Version 12 software; however, it is important to note that Version 12 software requires more system resources than previous versions did. As a result, you may find that some Windows 98/Me workstations may not be able to successfully run as many applications at the same time as with previous versions of the Tabs3 and PracticeMaster software. During our beta testing, we have found that some Windows 98/Me users that update to Version 12 do encounter system resources issues. Because of these system resources issues, we recommend using Windows XP or Windows 2000 for optimum performance. KB Article R11021, System Resources on Windows 98/Me, includes additional information regarding system resources issues on these older operating systems.

WINDOWS TERMINAL SERVICES: The Windows 2000 Terminal Services window cannot display more than 256 colors in some environments. Therefore, the colors of the icons and buttons in the Version 12 software may not be accurate when using this platform. Although the software still works as intended, you may want to consider upgrading to Windows 2003 Terminal Services because it does not have the 256 color limitation. For performance reasons, we further recommend not using a color depth greater than 16-bit color on a Terminal Services platform. *(Note: The 256 color limitation does not apply when running Windows 2000 Terminal Services in conjunction with certain versions of Citrix.)*

COLOR DEPTH: Version 12 requires 16-bit color or higher; 32-bit color is recommended.

SCREEN RESOLUTION: Version 12 requires 800 x 600 or higher screen resolution.

INTERNET EXPLORER: Version 12 of Tabs3 and PracticeMaster requires Microsoft Internet Explorer Version 6.

RUNNING ON A NETWORK: If running on a network, we recommend running the conversion during non-peak usage. Although the total time required will vary depending on the amount of data and hardware speed, the average time it takes to run the conversion program is less than 30 minutes. However, we recommend allowing additional time to run the required steps before and after the conversion. Allowing a total of 2 hours should be more than adequate for most firms. *(Tip: If you are running on a Windows network, running the conversion from the file server will take considerably less time if you have a large amount of data.)*

PREVIOUS VERSIONS: Previous versions of the programs will no longer be accessible once the conversion has been completed.

REFERENCE NUMBERS: Reference numbers of existing transactions may change.

CLIENT SERVER EDITIONS: Version 10 of the STI Server Software works with Version 12 Client Server editions of the software. Therefore no update is necessary for the STI Server Software. If your firm uses Client Server editions of the software, be sure to keep your Version 10 STI Server Software CD-ROM with the enclosed Version 12 CD-ROM after you have updated the Client Server editions of the software.

HOTDOCS®: PracticeMaster Version 12 continues to integrate with HotDocs Version 5.2 (or any HotDocs Version 5 system greater than Version 5.2 but less than Version 6). At this time, PracticeMaster does not integrate with HotDocs Version 6 or Version 2005.

CDS: Users of Critical Date System (CDS) can upgrade to PracticeMaster. Critical Date System Version 8 cannot be used with Tabs3 Version 12. If you need to upgrade CDS to PracticeMaster, please call our Technical Support Department for assistance.

CLIENT SERVER EDITIONS: Version 10 of the STI Server Software works with Version 12 Client Server editions of the software. Therefore no update is necessary for the STI Server Software. If your firm uses Client Server editions of the software, be sure to keep your Version 10 STI Server Software CD-ROM with the enclosed Version 12 CD-ROM after you have updated the Client Server editions of the software.

TASKBILL: If you are using TASKBILL software, then you must update TASKBILL to Version 12. Statements that have been updated using Tabs3 Version 9 can be processed using TASKBILL Version 12, but statements that have been updated using Tabs3 Version 8 can only be processed using TASKBILL Version 8. This is because Tabs3 Version 9 and later stores the statement number in the individual archive records whereas Tabs3 Version 8 did not. Tabs3 Version 8 used the statement date to determine which archive records belonged to the same statement.

SPECIAL PROGRAMS: If your firm purchased any modified or special programs from Software Technology, Inc., call Software Technology, Inc. before converting to Version 12 to see if the program(s) need updating.

QUICKBOOKS® INTEGRATION: The new QBXML integration features require QuickBooks Enterprise Solutions 2005, 2004, or 2003; QuickBooks Premier 2005, 2004, or 2003; or QuickBooks Pro 2005, 2004, or 2003. QuickBooks

2003 must be version 12.0 release 7 or higher. Furthermore, performance enhancements require that QuickBooks be run in Multi-user mode.

TIME MATTERS® INTEGRATION: At this time, client integration between Tabs3 Version 12 and Time Matters does not work. Time Matters will be making a change to allow integration with Version 12.

FREQUENTLY ASKED QUESTIONS: Our Knowledge Base on the Internet at www.support.Tabs3.com includes articles with frequently asked questions regarding this update. Reviewing this article may answer some of the questions you might encounter before, during, and after the update. The articles are R10910 - "Version 11 Update - Frequently Asked Questions" and R11002 - "Version 12 Update - Frequently Asked Questions."

Pre-Conversion Checklist

1. **GLS CLIENT LIST:** Invalid paths for any GLS client can cause the conversion to abort. This is a common problem for GLS clients that are no longer used. Hard drive mappings change and since the GLS client is no longer used, the data path doesn't get changed. Normally this isn't a problem until you attempt to convert the data. A blank data path is a valid path and simply indicates the data resides in the same directory as the program directory. Use the following instructions to print a GLS Client List.

GLS Version 10, GLS Version 9 and GLS Version 8 for Windows Users:

From the **Reports** menu, select GLS Client List. If you receive an error 1020 when attempting to print the list, this indicates you have an invalid path. Call Technical Support for assistance with eliminating this error. You **must** fix this problem before continuing with the conversion.

GLS Version 8 for DOS Users:

From the GLS main menu, select **Utilities** and then select **Add/Change/Delete GLS Client**. Press Escape and then enter **P** to print a GLS Client List. If you receive an error 76 when attempting to run the list, this indicates that you have an invalid path. Call Technical Support for assistance with eliminating this error. You **must** fix this problem before continuing with the conversion.

2. **GLS CHECK RECONCILIATION:** If a Check Reconciliation has been started but has not been completed, any reconciliation work will be deleted when the conversion is performed. To determine if a Check Reconciliation has been started but not completed:

GLS Version 10, GLS Version 9 and GLS Version 8 for Windows Users:

- a. From the GLS **Maintenance** menu, select **Check Reconciliation**.
- b. If Check Reconciliation has been started, a message will be displayed indicating that the Reconciliation has been started. If you want to retain any work that has already been done, click **Yes** and finish the Check Reconciliation now. Otherwise, click **No** to abort the Reconciliation.

GLS Version 8 for DOS Users:

- a. From the GLS main menu, select **Journals** and then select **Check Reconciliation**.
- b. If Check Reconciliation has been started, a message will be displayed indicating that the Reconciliation has been started. If you want to retain any work that has already been done, enter **C** and finish the Check Reconciliation now. Otherwise, enter **A** to Abort the Reconciliation.

3. ***Tabs3 Version 10 and Tabs3 Version 9 Users Only:***

TABS3 CLIENT NOTES: A new **Billing Notes & Instructions** field has been added to Tabs3 in addition to the standard **Client Notes** field. **Client Notes** that are marked as **Billing Instructions** will be converted to this new **Billing Notes & Instructions** field. There are a couple of issues to be aware of regarding how this field is converted:

Tabs3 Reports: In Version 12, the following reports can optionally include **Billing Notes & Instructions** but will no longer include **Client Notes**: Draft Statements, Detail and Summary Work-in-Process Reports, and Detail and Summary Accounts Receivable Reports.

Taskbill Users: If Taskbill uses any line in a **Client Notes** field that is also marked as **Billing Instructions**, the Taskbill Export will no longer work correctly for that client. To prevent this from occurring, we recommend clearing the **Billing Instructions** check box for Task Based Billing clients *before* converting to Version 12.

Before proceeding with the conversion, it is important to consider how you want the **Client Notes** field converted for your clients. For those clients that you want the information in **Client Notes** converted to **Billing Notes & Instructions**, make sure the **Billing Instructions** check box is selected. For those clients that you want the information to remain in **Client Notes**, make sure the **Billing Instructions** check box is cleared. If you have clients that have both Client Notes and Billing Instructions in the field, you may need to edit the information after the conversion by cutting and pasting the information from the **Billing Notes & Instructions** field to the **Client Notes** field (or vice versa).

► **To change the Billing Instructions field for clients:**

- a. In Version 10 or Version 9 of Tabs3, from the **Maintenance** menu, point to **Client Related** and select the **Change Client Options** menu option.
- b. Click **Yes** when asked if you want to make a backup.
- c. On the **Client** tab, enter a beginning and ending Client ID.
- d. If you only want to change Task Based billing clients:
Next to the Status option, select **Specific** and click the **Select Status** button.
From the Select Status Options window, select **Task Based** clients and click **OK**.
- e. On the **Stmt Notes** tab, click the **Select** button.
- f. A Select Options to Change window will be displayed. If you want the **Client Notes** field converted to **Client Notes**, select **Client Notes as Billing Instructions** and click **OK** to close the window. Leave the **Client Notes as Billing Instructions** check box cleared. If you want the **Client Notes** field converted to **Billing Notes & Instructions**, select **Client Notes as Billing Instructions** and click **OK** to close the window. Select the **Client Notes as Billing Instructions** check box.
- g. Click **OK** to proceed.

Taskbill Note: Alternatively, it may be possible to fix this after converting by editing the Taskbill Configuration to point to the same line of the **Billing Notes & Instructions** field instead of the **Client Notes** field. Be aware that some Taskbill formats require the information to be located in the **Client Notes** field and do not provide the opportunity to change the location of the information.

4. **Tabs3 Version 8 Users Only:**

WRITE-UP/WRITE-DOWN REPORT:

The Tabs3 Version 12 Write-Up/Write-Down Report now retrieves its information from the archive file. As a result, write-up/write-down information for expenses and advances that were billed prior to this conversion may not be available on this report. You may want to run a Write-Up/Write-Down Report for all clients before converting. (*Note: Write-up/write-down information for fees is not affected.*)

5. **Tabs3 Version 9 and Tabs3 Version 8 Users Only:**

TAS EMPLOYEES & TABS3 TIMEKEEPERS: Make sure Tabs3 timekeepers match the TAS employee numbers. Print a Tabs3 Timekeeper List and a TAS Attorney List. Compare the numbers. If there are discrepancies, use the TAS Renumber Employee program to renumber employees so they have the same timekeeper numbers as Tabs3. Use the following instructions to print a Tabs3 Timekeeper List and a TAS Employee List.

Version 9 Users and Version 8 for Windows Users:

- a. From the Tabs3 **Reports** menu, point to **Miscellaneous** and then click **Timekeeper List**. Click **OK** to print the report.
- b. From the TAS **Reports** menu, point to **Miscellaneous** and then click **Attorney List**. Click **OK** to print the report.

Version 8 for DOS Users:

- a. From the Tabs3 main menu, select **Timekeeper, Category & Transaction Code Information**. Then, select **Timekeeper, Category and Transaction Code Lists**. Next, select **Timekeeper List**. Select the desired options and print the report.
- b. From the TAS main menu, select **Attorney, Payee and Bank Account Information**. Then, select **Attorney, Payee and Bank Account Lists**. Next, select **Attorney List**. Select the desired options and print the report.

6. **TAS & TABS3 NOTE:** If you are converting Tabs3 and TAS where Tabs3 uses an Alpha Key Type and TAS uses a Numeric Key Type, contact Technical Support for special instructions.

7. **APS Version 9 and APS Version 8 Users Only:**

APS VOIDED CHECK LIST: If you are converting APS, print a Voided Check List in APS. In previous versions of APS, you entered your initials when voiding a check. This is no longer necessary because APS Version 12 automatically tracks which User ID voided a check. However, all previously voided checks will have their initials switched to a special user name of STCONV11. Use the following instructions to print a Voided Check List:

APS Version 9 and APS Version 8 for Windows Users:

From the **Checks** menu, point to **Void Checks** and then select **Voided Check List**. Click **OK** and print the report.

APS Version 8 for DOS Users:

From the APS main menu, select **Checks** and then select **Voided Check List**. Select the desired options and print the report.

8. **CONVERT AT THE SAME TIME:** All integrated systems must be converted at the same time. DO NOT convert systems separately!

Conversion Procedure

Note: Make sure no other users are accessing any Tabs3, PracticeMaster, or Tabs3 Financial Software product while you are performing the update. You will also need to take steps to insure that no other user starts the software while you are performing the following procedures.

Note: This update *must* be installed over an existing Version 10, Version 9, or Version 8 installation. If you are running a version earlier than Version 8, call Technical Support for more information.

Note: When installing from a Windows 2000/XP/NT4 workstation, you must have Administrator Rights.

1. **TABS3 REMOTE:** If you use Tabs3 Remote, do the following for *all* workstations using Tabs3 Remote.
 - a. Print and delete any remote data entry verification lists.
 - b. Merge any data files created by Tabs3 Remote before proceeding with the conversion.
 - c. Using Windows Explorer, manually delete the following files from the remote workstation using Windows Explorer. These files may or may not be present.

Version 10 Users: R3FEEVER.*, R3CSTVER.*, RMT*.*
Version 9 Users: R3FEEVER.*, R3CPVER.*, RMT*.*
Version 8 Users: T3FVER??.RMT, T3EVER??.RMT, *.RMT
 - d. Make sure the remote site does not perform data entry or start the Fee or Cost data entry programs until Tabs3 Remote has been updated to Version 12.
2. **Tabs3 Version 8 Users Only:**

PRINT TABS3 RETAINER REPORTS: A new Client Funds feature replaces the retainer billing feature in Tabs3 Version 8. Before converting, we recommend printing two separate reports of retainer information. First, print a Retainers by Invoice Report as a record of which clients have retainer balances due (*Windows Users: Reports | Accounts Receivable | Retainers by Invoice Report*) (*DOS Users: Statements/Accounts Receivable | Retainers by Invoice Report*). Second, print a Transaction File List for retainers only (*Windows Users: Reports | Transaction Reports | Transaction File List*) (*DOS Users: Fee, Cost & Payment Transactions | Transaction File List*). For Tabs3 for Windows users, on the **Transactions** tab, select the Retainers check box and clear the other check boxes. For Tabs3 for DOS users, select "R" in response to the "Fee, Cost or Retainer List?" prompt. These reports can be used after the conversion has completed as a basis for editing the Target Balance (*as described on page 17*).
3. **Tabs3 Version 10 Users Only:**

TABS3 PALM SOFTWARE: If you use Tabs3 Palm Software, make sure you HotSync all data from handheld devices before installing the update. Also, the TABS III Palm Application software name has been changed to Tabs3 Palm Software. As a result, you must uninstall the Version 10 TABS III Palm Application software before you install the Version 12 software. Detailed procedures to uninstall the Palm software can be found in your TABS III Palm Application software manual. The reason you need to uninstall the Version 10 software is because the Version 10 software and the Version 12 software have the same ID number but different names. Therefore, if you do not uninstall the TABS III Palm Application before installing Tabs3 Palm Software, you will have both icons on your handheld. If you then delete the old TABS III Palm application after installing the Version 12 application, it will also delete the new Tabs3 Palm Software application.

4. **PracticeMaster Version 10 Users Only:**
PRACTICEMASTER PALM SOFTWARE: If you use PracticeMaster Palm Application (*i.e., not the PracticeMaster Palm Conduits*), make sure you HotSync all data from handheld devices before installing the update.
5. **PracticeMaster Version 10 Users Only:**
PRACTICEMASTER BRIEFCASE: If you use PracticeMaster Briefcase, do the following for all computers using PracticeMaster Briefcase:
 - a. Make sure the Briefcase site does not perform data entry until it has been updated to Version 12.
 - b. Check in any data files created by PracticeMaster Briefcase before proceeding with the conversion.
6. **TBDEVICE & WCNVASCV COST RECOVERY PROGRAMS:** If you use either the TBDEVICE or WCNVASCV cost recovery programs, make sure you merge all data from these programs **before** proceeding with the conversion.
7. **PRINT VERIFICATION LISTS:** Any verification lists that haven't been printed will be deleted by the conversion program. Print these lists (if they exist) before starting the conversion if you want to retain a copy of this information. If you are using a multi-user version of the software, make sure you print verification lists for all User IDs.
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8. **DATA FILE INTEGRITY CHECK:** Run the Data File Integrity Check utility program for **all** systems. If you are converting Tabs3, also run the Tabs3 Archive Data Integrity Check. Proceed only if there are no errors.
 Tabs3 Tabs3 Archive Data Integrity Check
 PracticeMaster GLS APS TAS

GLS Note: If you are configured for multiple GLS clients, make sure you run the Data File Integrity Check program for *all* GLS clients.

9. **DETERMINE PROGRAM DIRECTORY:** During the installation, you will be asked to specify where you want the program files installed. Although **Browse** and **Search** buttons are available to locate the existing program files, it is helpful to know this location *before* installing the Version 12 program files. The following can be used to determine where the program files are installed.

Version 10, Version 9 and Version 8 for Windows Users:

Start System Configuration. From the **Help** menu, select the **About System Config** menu option. Write down the Program Directory (*not the Current Working Directory*) in the space provided below.

Version 8 for DOS Users:

Start System Manager. From the Main menu, press "Shift+?". Write down the Program Directory in the space provided.

Program Directory: _____

10. **CLOSE PROGRAMS:** Close the following programs.
 - a. Close any programs opened during the previous steps.
 - b. Close Microsoft Word if you will be installing PracticeMaster.
 - c. **Version 10 Users Only:** Close the Tabs3 Palm Application, PracticeMaster Palm Application, and Palm Desktop for all workstations on the network that use these programs. The installation program will display an error if any of these icons are loaded in the System Tray of any workstation on the network.
11. **BACK UP:** Back up all of the Version 10, Version 9 or Version 8 data files *and* program files. **DO NOT** skip this step. If the conversion program is interrupted for any reason, you *must* restore from a backup and start over. Use a backup method other than the built-in backup program because the built-in backup program does not back up program files.
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Tip: The easiest way to make this backup is to copy the entire directory to another location.

Important: Make sure no other users are in the software when you make this backup.

12. **INSTALL THE VERSION 12 PROGRAM FILES:** Use the following instructions to install System Configuration and *all* other Version 12 programs in the program directory specified in step #9.

Note: *DO NOT* start any Version 12 programs until *after* the conversion has been completed.

- a. Insert the program CD-ROM into your CD-ROM drive.
- b. A CD Browser program will automatically start. (*Note: If the CD-ROM Autorun feature is disabled, click the **Start** button, and then click **Run...** Click the **Browse** button and navigate to the CD-ROM drive. Double-click the **LAUNCH.EXE** file. Click **OK.***)
- c. Select **Install Software** and select the products you want to install.
- d. Follow the on-screen instructions to install the software.

Recovery File Note: If you are installing from an Update CD, you will be asked to specify a location for a Recovery File. We recommend saving a Recovery File to a floppy disk (if available) and storing it in a safe place with this CD-ROM. You will need a Recovery File in the event you ever need to reinstall the software to a different computer. If a floppy disk drive is not accessible from the computer being used, you can create a Recovery File in a different location and copy it to other media later; or, you can use the **Create Recovery File** menu on the CD to create a Recovery File later. Be aware that a Recovery File must be created using a computer that has access to Tabs3, PracticeMaster, and Tabs3 Financial Software program files.

Update CD Note: If you are installing from a Version 12 Update CD that was sent out to all maintenance users, the Update CD assumes you are already using Version 11. Since you are still using an older version of the software, instead of selecting the **Install Software** menu option, you will need to select **Begin Update**, click **Next** and minimize the Adobe Acrobat Reader with the conversion instructions (you don't need to print them since you are using these conversion instructions), and then select **Install Update**, and then **Version 12 Update**. Once the installation completes, clear the **Run the Version 12 Conversion Program** check box because you need to run other conversion programs **BEFORE** the Version 12 Conversion is performed. Proceed with the following instructions.

13. **Version 8 Users Only:**

CONVERT TO VERSION 9: The program to convert to Version 9 data files is a Windows program named WCONV9.EXE. This program converts all Version 8 systems to Version 9. Use the following instructions to perform this conversion.

- a. Click the **Start** button, and then select **Run**.
- b. Click the **Browse** button to navigate to the program directory.
- c. Select the **WCONV9.EXE** file and then click **OK**.
- d. Follow the instructions to complete the conversion. The **Help** button or the F1 key can be used to read more about the various questions in the conversion program.
- e. Upon completion, the message "Data conversion completed" will be displayed.

Note: If errors were encountered during the conversion, the message "Data conversion completed with X error(s)." will be displayed. An error list can be printed if desired. The file is called WCONV9.LOG and can be printed using any text editor such as Windows Notepad. Print the list if errors were encountered. Call our Technical Support Department if the conversion did not complete or if you need help resolving the errors.

14. **CONVERT TO VERSION 10:** This conversion program is named STCONV10.EXE. It converts all Version 9 data to Version 10 data. Use the following procedures to perform this conversion.

- a. Click the **Start** button, and then select **Run**.
- b. Click the **Browse** button to navigate to the program directory.
- c. Select the **STCONV10.EXE** file and then click **OK**.
- d. Follow the instructions to complete the conversion. The **Help** button or the F1 key can be used to read more about the various questions in the conversion program.
- e. Upon completion, the message "Data conversion completed" will be displayed.

Note: If messages were generated during the conversion or synchronization, the message “Data conversion completed with X message(s).” will be displayed. These messages can be found in a file named STCONV10.LOG and can be printed using any text editor such as Windows Notepad. We recommend printing this file (*provided it is not too large*). The Tabs3 Knowledge Base on the Internet (<http://support.Tabs3.com>) contains details regarding possible messages that may be found in this log file (*keyword = Conversion | STCONV10.LOG Information*). Call our Technical Support Department if the conversion did not complete or if you need help interpreting or troubleshooting any messages.

15. **CONVERT TO VERSION 11:** From the **Start** menu, point to **Programs**, and then point to **Software Technology** and click **Version 11 Conversion**. You will be prompted to create a backup; we strongly recommend taking the time to create this backup file. Follow the instructions to complete the conversion. The **Help** button or the F1 key can be used to read more about the various questions in the conversion program.

Note: If the **Version 11 Conversion** menu option is not shown, you can use the following alternate method to start the conversion.

Click the **Start** button, and then select **Run**.

Click the **Browse** button to navigate to the program directory specified in step #9, and then select the STCONV11.EXE file. Click **Open**. Click **OK**.

If the STCONV11.EXE file cannot be found, this indicates one of the following:

- ♦ the installation program was interrupted;
- ♦ Version 11 was installed in the wrong directory.

Upon completion, the message “Data conversion completed” will be displayed.

Note: If messages were generated during the conversion, the message “Data conversion completed with X message(s).” will be displayed. These messages can be found in a file named STCONV11.LOG, which can be printed using any text editor such as Windows Notepad. We recommend printing this file (*provided it are not too large*). If the file is extremely large, you will not be able to open it with Notepad or WordPad. Consider trying Microsoft Word to open the file. Call our Technical Support Department if the conversion did not complete or if you need help interpreting or troubleshooting any messages.

16. **CONVERT TO VERSION 12:** From the **Start** menu, point to **Programs**, and then point to **Software Technology** and click **Version 12 Conversion**. Follow the instructions to complete the conversion. You will be prompted to create a backup; we strongly recommend taking the time to create this backup file. The **Help** button or the F1 key can be used to read more about the conversion program.

Note: If the **Version 12 Conversion** menu option is not shown, you can use the following alternate method to start the conversion.

1. Click the **Start** button, and then select **Run**.
2. Click the **Browse** button to navigate to the program directory specified in step #9, and then select the STCONV12.EXE file. Click **Open**. Click **OK**.

If the STCONV12.EXE file cannot be found, this indicates one of the following:

- ♦ the installation program was interrupted;
- ♦ Version 12 was installed in the wrong directory.

17. **COMPLETION MESSAGE:** Upon completion, the message “Data conversion completed” will be displayed.

Note: If messages were generated during the conversion, the message “Data conversion completed with X message(s).” will be displayed. These messages can be found in the file named STCONV12.LOG, which can be printed using any text editor such as Windows Notepad, WordPad, or Microsoft Word. Call Technical Support if you need help interpreting or troubleshooting any messages.

18. **REBUILD TABS3 CLIENT LEDGER DETAIL:** Start Tabs3 Version 12. If a message is displayed indicating the Client Ledger Detail files are not present, click **OK** to clear the message. Click **Yes** when asked if you want to disable the rebuild warning. If you received this message, use the following steps to create the new Client Ledger Detail files.

Perform these procedures **ONLY** if you received the “Tabs3 has detected that the Client Ledger Detail files are not present” message.

- a. From the **Utilities** menu, select **Rebuild Client Ledger Detail**.
- b. Make a backup when prompted to do so. If the following process is aborted for any reason, you will be required to restore from the backup.
- c. Select **All Clients**.
- d. Select **Apply Detail Only**. (*Caution: Do NOT select Allocation Detail Only or Both*).
- e. Click **OK**. Upon completion, the message, “Task Completed” will be displayed. Click **OK** to close the program.

19. **DATA FILE INTEGRITY CHECKS:** In order to verify that the data converted successfully, run the Data File Integrity Check utility program for **all** systems. If you are converting Tabs3, also run the Tabs3 Archive Data Integrity Check.

- Tabs3 Tabs3 Archive Data Integrity Check
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GLS Note: If you are configured for multiple GLS clients, make sure you run the Data File Integrity Check program for *all* GLS clients.

QuickBooks Note: If QuickBooks integration was used with both Tabs3 and PracticeMaster Version 10.7, an error 500 will be shown in the Tabs3 and PracticeMaster Data File Integrity Checks. This error is expected. To correct this error, simply run the Synchronize Tabs3 and PracticeMaster program and then rerun the Data File Integrity Check programs in PracticeMaster and Tabs3.

If there are errors, print the Error Report(s) and resolve the errors. Call our Technical Support Department if you need help resolving any errors.

20. **FINISHING TOUCHES:** It is important to perform the following steps in the Finishing Touches sections. Once you have completed all of the steps in the Finishing Touches sections, you will be ready to use Version 12!

Tabs3 Remote Users

Perform the following instructions if you are also converting an older installation of Tabs3 Remote Entry Software.

1. **VERIFICATION LISTS:** Print and delete all data entry verification lists. Make sure all remote data is merged prior to updating Tabs3 or Tabs3 Remote (*as directed in step #1 on page 5*).
2. **DELETE OLD REMOTE DATA FILES:** Before installing Tabs3 Remote Version 12, use Windows Explorer to browse to the Tabs3 Remote program folder and delete any old remote data files.

Tabs3 Remote Version 10 and Version 9 Users: RMT*.*

Tabs3 Remote Version 8 Users: *.RMT

3. **VALIDATION FILES:** Delete any old validation files (*R3*.**) before installing Tabs3 Remote Version 12.
4. **INSTALL REMOTE:** Follow the instructions listed in Step #12 on page 7 to install the Tabs3 Remote Version 12 software on the remote workstation.
5. **CONFIGURE REMOTE SOFTWARE:** After starting Tabs3 Remote Version 12 for the first time, you will have to reconfigure the software (*i.e., Tabs3 Remote Customization and User Configuration*).
6. **Tabs3 Remote Version 8 Users Only:**
DATA FILES: The Tabs3 Remote data file names have been changed to RMT*.*. If batch files are used to transfer data files, the batch files may need to be edited.
7. **VALIDATION FILES:** The Tabs3 optional validation files are named R3*.*. If you use the optional validation files (recommended), make sure you recreate new validation files using the main Tabs3 computer and transfer the validation files to each remote workstation. Validation files are created in Tabs3 using the *Create Validation Files* program. If batch files are used to transfer validation files, the batch files may need to be edited.

8. **EDIT OR DELETE DESKTOP ICONS:** The name of the program used to start Version 12 has changed. If you elected to add new desktop icons during the Tabs3 Remote installation, you will want to delete your old desktop icons (*i.e., right-click the old desktop icon and click **Delete***). If you did not install new desktop icons, you will need to edit any existing desktop icons (*i.e., right-click the old desktop icon, click **Properties** and edit the **Target** field*). The following table shows the new and old executable names:

Version 12	Version 9 Version 8 Windows	Version 8 DOS
RTABS.EXE	WRTABS.EXE	RTABS3.EXE

9. **UPDATE OTHER REMOTE INSTALLATIONS:** Repeat steps #1-8 for any other computers where the Tabs3 Remote program files are installed.

Finishing Touches

1. **FONTS:** One of the most appealing enhancements is the support of proportional fonts. The fonts specified for the default printers are stored in the STI.INI file and are not changed during the conversion—they remain set at the fixed pitch fonts that were used in the previous version. In order to take advantage of the enhanced report output, we strongly recommend that you change the default font for the default printers for each workstation. To change the printer font:
 - a. From any application's **File** menu, select **Print Setup**.
 - b. Select the desired printer.
 - c. Make sure that **Automatic** is selected for the **Font Selection Mode**.
 - d. Under the Automatic Font Selection Setup, click **Select**.
 - e. Select the desired font. We recommend selecting Arial or Times New Roman as a starting point.
 - f. Click **OK** to close the Font dialog.
 - g. Click the **Advanced Printing Features** button. Review and select the desired options.
 - h. If you are using Tabs3, click the **Statement Setup** button.
 1. At the top of the window next to Normal Font, click **Select**.
 2. Select the desired font. We recommend selecting Arial or Times New Roman as a starting point.
 3. Click **OK** to close the Font dialog.
 4. You may want to change the font used for the Heading. If so, in the Page One box, click **Select** and select the desired font. Click **OK** to close the Font dialog.
 5. Click **OK** to close the Statement Setup window.
 - i. Click **OK** to close the Printer Setup window.
 - j. Preview or print a report.
 - k. If you are using Tabs3, preview or print a draft statement.
 - l. Make any adjustments as desired.

2. **APS & TAS CHECKS:** You may want to change the font for your default check printer. If you do, be sure to print a test pattern and make any adjustments as required.
 - a. From the **File** menu, select **Print Setup**.
 - b. Select the desired printer.
 - c. Under the Automatic Font Selection Setup, click **Select**.
 - d. Select the desired font. We recommend selecting Arial or Times New Roman as a starting point.
 - e. Click **OK** to close the font dialog, and then click **OK** again to close the Printer Setup window.
 - f. From the **File** menu, select **Print Check Test Pattern**.

3. **GLS BANK ACCOUNT:** GLS requires that checking accounts and other cash accounts be designated as bank accounts in the Chart of Accounts program. To do this, start GLS. From the **File** menu, point to **Open** and select **Chart of Accounts**. Select the bank account and then select the **Bank Account** check box. Then, click the **Bank Info** button and enter the bank name, account name and account number. Repeat this step for all bank accounts you have defined in GLS. After you have done this, take a quick look at the new Bank Account Balance Report. From the **Reports** menu, select **Bank Account Balance**.

4. **CONVERSION BACKUP FILE:** If you elected to create backup files during the conversion, backup files named CVBACK.ARQ, STCONV11.ARQ, and STCONV12.ARQ have been created in the BACKUP directory. These files

may be fairly large depending on the amount of data. You may want to delete these files at some point; however, we recommend not deleting them right away.

5. **BACKUP PROCEDURES:** Review your backup procedures—specifically file names and locations. All Version 12 data files now use the *.DAT and *.IDX file name specifications as opposed to the *.DTA and *.KEY file name specifications used for some older versions. Other file naming specifications are used for report definitions, user dictionary files, and other miscellaneous data files. Article R10994 in our Knowledge Base, “Version 12 Data File Names”, contains a comprehensive list of all data file names for all software systems. Because of integration issues as well as the implementation of new files and folders, we strongly recommend backing up the entire folder with all folders under it as opposed to backing up individual systems.
6. **OLD DISKS:** We recommend that you collect all of your old program disks and recycle or destroy them.
7. **SAMPLE DATA:** Version 12 software automatically installs sample data in a directory named TUTOR that is created in the data path specified during the SETUP program. Separate icons for the sample data are installed in a new group under the **Software Technology** group named **Trial Software with Sample Data**. Keep in mind that using or refreshing the sample data in the **Trial Software with Sample Data** group has no effect on your regular data files because the sample data is located in the TUTOR directory.
8. **PracticeMaster Note:** Any workstation using the PracticeMaster Palm Conduits or the Word Document Assembly feature in PracticeMaster **MUST** perform this step.

Note: If you are converting from Version 10.7 or Version 10.6, this step is optional (*provided you are not using the PracticeMaster Palm Conduits or Word Document Assembly*). However, if you are converting from Version 8, Version 9, Version 10.5 or Version 10.2, the following step is **NOT** optional and **MUST** be performed.

WORKSTATION INSTALLATION: After all systems have been installed and converted, other workstations that access Tabs3 software **must** run the SETUP program so their program shortcuts are modified appropriately and the required files are installed.

► To install the software on a workstation

- a. From the workstation, click the **Start** button, and then click **Run...**
 - b. Click the **Browse** button and navigate to the directory where the Version 12 program files were installed on the server. Then, select the **SETUP.EXE** file found in the program file directory. Click **Open** and then click **OK** to run the program.
 - c. Follow the on-screen instructions.
 - d. Repeat steps a through c for each workstation that will be using the software.
9. **SECURITY:** The System Configuration “Groups” are now called “Access Profiles”. Version 8/9 Groups are converted to Version 12 Access Profiles. Although Groups can be defined in System Configuration Version 12, they are only used for PracticeMaster e-mail and calendaring purposes.

No other changes are required in System Configuration. However, you may want to review the rights assigned to the access profiles for new functions. All access profiles are assigned rights to all new programs including Back Up Data Files, Restore Data Files, Support Log, etc.

10. **INSTALL VERSION 12 DOCUMENTATION:** The Version 12 manuals and tutorials are provided as Adobe PDF files (Portable Document Format) to make them accessible to you at any time from your workstation. This documentation can be installed from the CD-ROM by selecting the **Documentation** menu option and following the on-screen instructions to install the desired documentation.
11. **INSTALL VERSION 12 MULTIMEDIA TUTORIALS:** Multimedia tutorials are available for Tabs3 and PracticeMaster and are provided on the CD-ROM. Although the multimedia tutorials can be run from the CD-ROM, if you have the hard disk space available, we recommend installing them on your hard drive so they are accessible via the help provided with the software. The new multimedia tutorials use MP3 sound files, thereby requiring considerably less disk space than the Version 10 multimedia tutorial files. The updated multimedia tutorials can be installed from the CD-ROM by selecting the **MULTIMEDIA TUTORIALS** menu option and following the on-screen instructions to install them. (*Tip: In order to access the multimedia tutorials from the Help files, the multimedia tutorials **must** be installed to a folder named VIDEO that is located under the program directory.*)

12. ****IMPORTANT** MODIFY INTERNAL PROCEDURES:** You may need to modify internal procedures as a result of the following enhancements to the software:
- Tab3 and GLS:** When a write-up or write-down is performed in Tab3, GLS journal entries are now automatically made. You no longer need to make manual journal entries in GLS for write-ups and write-downs.
 - Tab3 and GLS:** When a payment refund or reversal is performed, adjusting GLS journal entries are now optionally made. You may no longer need to make manual journal entries in GLS for payment adjustments.
 - Tab3 and GLS:** When a cost entry is edited or deleted in Tab3, a GLS journal entry window is shown with the associated GLS journal entries, allowing you to make corresponding changes to the GLS journal entries.
 - APS and Tab3:** When an invoice is edited in APS, the associated Tab3 cost transactions can be modified at the same time.
13. **INITIALIZE TABS3 ODBC:** If you are using an ODBC driver to retrieve information from Tab3, PracticeMaster, GLS, APS, or TAS data files, we recommend that you run the **Initialize ODBC** program at this time to create an updated data dictionary file with the new files. Be aware that some ODBC reports or applications may need adjustments as a result of some fields being moved. For example, there no longer is a BUDGET file (T3BUDGET.DAT); these fields now reside in the TASKBUDGET file (T3TBBUDG.DAT). Also, the physical order of some fields may have changed, therefore if fields are accessed by field number, adjustments may need to be made.
14. **COST RECOVERY SYSTEMS:** Any firm that uses Cost Recovery Systems *must* run the Create Validation Files program (*Maintenance | Integration | Create Validation Files*) with the **Data Capture Device** option selected in order to be able to integrate with Version 12. If the cost recovery system used does not use validation files, then you can clear all check boxes (*except for the Timekeeper check box*) before running this program in order to save disk space.

Certain cost recovery systems (e.g., Equitrac, Infortext, Pitney Bowes, Timeslips, etc.) that use validation files require you to run the Create Validation Files program prior to creating validation files in the cost recovery system. For these cost recovery systems, the Create Validation Files program must be run with the **Data Capture Device** option and all available check boxes selected each time validation files are created.

15. **Tab3 Palm Version 10 Users Only:**
TABS3 PALM SOFTWARE: If you are using the Tab3 Palm Software, you will need to install the updated Tab3 Palm Software onto all handheld devices. To install the Tab3 Palm Software on a handheld device, from the **Start** button, select **Programs | Software Technology | Palm Software | Install Tab3 Palm App**. Once the files have been installed on the handheld, you will also need to create new Palm Application Data files in the host application and HotSync them to each handheld.
16. **DELETE TMP FILES:** Various files with an extension of “.TMP” may be present in the program file directory from previous versions of the software. We recommend deleting these files to recover disk space. It is not unusual to have hundreds of these TMP files.
17. **Version 9 or Version 8 Users Only:**
EDIT OR DELETE DESKTOP ICONS: The names of the programs used to start Version 12 have changed. If you elected to add new desktop icons during the installation, you will want to delete your old desktop icons (*i.e., right-click the old desktop icon and click **Delete***). If you did not install new desktop icons, you will need to edit any existing desktop icons (*i.e., right-click the old desktop icon, click **Properties** and edit the **Target** field*). (*Note: You will also need to edit any shortcuts that are located in your Startup menu.*) The following table shows the new and old executable names:

Program	Version 12	Version 9 Version 8 Windows	Version 8 DOS
System Configuration*	STICONFG.EXE	STICONFG.EXE	STI.EXE
Tab3	TABS.EXE	WTABS.EXE	STI.EXE
GLS	GLS.EXE	WGLS.EXE	STI.EXE
APS	APS.EXE	WAPS.EXE	STI.EXE
TAS	TAS.EXE	WTAS.EXE	STI.EXE
Taskbill*	WTSKBILL.EXE	WTSKBILL.EXE	TASKBILL.EXE

*The executable name for these programs did not change between Version 9 and Version 12.

18. **TABS3 COLLECTIONS REPORT ICON:** If the icons on the Client Manager have been customized, the Collections Report will not be shown as an icon on the Client Manager. You may want to customize your Client Manager to include the Collections Report icon.

▶ **To customize your Client Manager**

- a. Start Tabs3 and press Ctrl+M to open the Client Manager.
 - b. Click the **A/R Balance** button.
 - c. Click the **Customize** option in the lower right-hand corner.
 - d. Click the desired “Not Assigned” or other icon position.
 - e. Select the Collections Report and click **OK**.
 - f. Click the **Run** option in the lower right-hand corner and then click **Close** in the upper right-hand corner.
 - g. Click **Yes** when asked to confirm you want to save your changes.
19. **COLLECTIONS REPORT ACCESS RIGHTS:** By default, the rights assigned to the Collections Report in the Access Profile are set to “No”. The Access Profile rights must be modified to allow access to this report.

▶ **To modify an Access Profile to have access to the Collections Report**

- a. Start System Configuration.
- b. From the **File** menu, point to **Open** and select **Access Profile**.
- c. Click the drop-down button in the **Access ID** field and select the desired Access Profile.
- d. Select the **Tabs3** tab.
- e. In the top list, scroll down and select the **Accounts Receivable & Client Reports/Conflict of Interest** group.
- f. In the bottom list, select the **Collections Report** function.
- g. Under **Selected Functions**, click **Allow** to grant access to this function (**Yes**).
- h. Press Ctrl+S to save the changes to the Access Profile.
- i. Repeat steps c thru h for each Access Profile that will have access to the Collections Report.


Finishing Touches - PracticeMaster

1. **COST FILE FORM LAYOUT - Version 11 Changes:** **Units** and **Rate** fields have been added to the Cost File. These new fields may or may not be on your Cost data entry window’s form layout. If your firm made any changes to the Version 10 Cost File data entry form, then your form layout will not be converted so as not to overwrite your custom changes. However, if no changes were made to the Version 10 form layout, then the new fields will be shown when you open the Version 12 Cost program. If the **Units** and **Rate** fields are not shown after converting and you would like them to be shown, use the **Form Designer** program to add the fields to the form layout.
2. **CLIENT FILE FORM LAYOUT - Version 11 Changes:** The form layout for the Client File has been changed to match the new Tabs3 Client File layout. Your Client File form layout may have changed. If your firm made any changes to the Version 10 Client File data entry form, then your form layout will not be converted so as not to overwrite your custom changes. However, if no changes were made to the Version 10 form layout, then the Client File will use the new form layout. The Form Designer can be used to change form layouts as desired. If your form layout was not converted because you made custom changes, you may want to add **Weather** and **Map** buttons to the Client File that use the new **Get Weather** and **Get Map** features.
3. **RELATED PARTY FORM LAYOUT - Version 11 Changes:** If your firm made any changes to the Version 10 Related Party data entry form, then your form layout will not have the new **Weather** and **Map** buttons. You can use the Form Designer to add **Weather** and **Map** buttons to the Related Party File that use the new **Get Weather** and **Get Map** features.
4. **MORE FORM LAYOUT CHANGES - Version 12 Changes:** New fields have been added to the following files with the release of Version 12: Client, Related Party, Calendar, and Journal. If your firm made any changes to the data entry form (i.e., form layout) for any of these files, then that form layout will not be converted (so as not to overwrite your custom changes) and the new fields will not be shown. However, if no changes were made to the form layout, then the new default OEM form layout will be implemented and the new fields will be shown when you open the data entry program.

The following describes the new fields that have been added to each file:

File	New Version 12 Fields
Client File	New <i>Client Photo</i> field on the Details tab. When assigned, this field is used in the new Client SnapShot. New <i>Web Page</i> field on the Address tab.
Related Party File	New <i>Related Party Photo</i> field on the Contact/Misc tab. When assigned, this field is used in the new Related Party SnapShot.
Calendar File	New <i>Location</i> field. (Note: See step 5 labeled “Calendar File”.)
Journal File	Multiple new fields for E-mail journal records. (Note: Because of the numerous changes made to the various form layouts for each record type, we recommend resetting this file to use the default OEM form layout and then redoing any customization. However, keep in mind that resetting the Journal File to use the default OEM form layout will reset the data entry forms for all journal record types including phone tasks, time tasks, research tasks, client notes, and e-mail records.)

If the new fields are not shown, you can do one of the following. How you elect to proceed will depend on how much customization has been added to the files.

- **Install the new default OEM form layout.** This will overwrite any custom changes your firm has made to the form layout for that file. To do this:
 - a. Open the file and select the **List** tab.
 - b. From the **Edit** menu, select **Form Designer**.
 - c. Click the  button to open the Control Panel.
 - d. Click the **Reset to OEM Layout** button.
 - e. Click **Yes** to confirm that you want to overwrite your form layout.
 - f. Click **Close** to close the Control Panel.

...OR...
- **Manually add the fields to your current form layout.** You can use the Form Designer to add the fields. KB Article R11001 in our Knowledge Base includes step-by-step procedures to add the fields to the form layout.
- **Do nothing at this time and do not use the new fields.** (*Note: This is not an option for the Journal File if you are using PracticeMaster E-mail.*)

E-mail Note: Previously, the body of an e-mail message was stored in the Description field of the Journal file. In Version 12, the body of an e-mail message is now stored in a new field called E-mail Body, which cannot be edited. When the Version 10 data is converted to Version 12, the information in the Description field for e-mail records is copied to the new E-Mail Body field. This information is also retained in the old Description field. A label of Comments has been added to the E-mail Journal form for the old Description field (*provided you are using the new OEM form layout for the Journal File*). After resetting the Journal File to use the OEM form layout as previously recommended, you will see that all new E-mail records will have a blank Description (Comments) field when saved. This field can now be used for your comments about the e-mail or anything else that needs to be noted regarding the record.

5. **CALENDAR FILE - NEW LOCATION FIELD:** PracticeMaster now has a new Location field, which is a protected field. If a Location field was previously added to the Calendar file by your firm, when the conversion is performed, PracticeMaster will rename the existing Location field to LOCATION_1 and add a new memo field named LOCATION. The PMCONV12.LOG file will indicate whether or not this has occurred. If it has occurred, the old Location information will not be available in your new Location field. Please call our Technical Support Department for assistance on how to deal with this issue.
6. **NEW “RESIZE AUTOMATICALLY” FEATURE:** A new feature has been added to PracticeMaster Version 12 that allows you to assign a **Resize Automatically** attribute to Memo type fields. This attribute allows the field to automatically resize in data entry windows and use all available space when the window is resized. System files with

Memo type fields whose form layout was not previously modified by your firm will automatically have this attribute set. Likewise, files that were reset to the OEM form layout as described in the previous step will also have this attribute set. However, if your firm modified the form layout, the attribute will not be set. You may want to check the Memo type fields in your files and select this attribute if it is not already configured.

► **To set the Resize Automatically attribute**

- a. Open the desired file.
- b. From the **List** tab, select the **Edit** menu and then select **Form Designer**.
- c. Find the Memo field and click it to select it.
 - If the field has a red triangle shown in the lower right hand corner, it is already configured to **Resize Automatically**.
 - If no red triangle is shown, right-click the field and select **Resize Automatically**. (*Tip: You can right-click the field again to verify that a check mark is shown next to the **Resize Automatically** menu option.*)

The following is a list of Memo type fields that you may want to set to **Resize Automatically**. Additionally, you may have Memo fields in other User Defined Lookup files, Common Client Related files, and Area of Practice files that you may want to configure with the new **Resize Automatically** attribute.

File	Memo Field
Client File	Comments
Related Party File	Comments
Journal File	
Client Notes tab	Description
E-Mail tab	Description
Phone tab	Description
Time Task tab	Description
Research tab	Description
Tabs3 tab	Description
Calendar File	Comments
Fee File	Description
Cost File	Description

7. **CONFLICT SEARCH & CONTACT SEARCH:** PracticeMaster now allows you to include e-mail fields, phone fields and User ID fields for conflict and contact searches. In order for this new feature to work, you will need to use File Maintenance to modify the file definition so the desired fields have their Include in Conflict Search and/or Include in Contact Search check boxes selected. Once this is done, the conflict of interest search index files must be rebuilt.
8. **REPORT WRITER REPORT DEFINITIONS:** When using proportional fonts, some reports may not look the same in Version 12 as they did in Version 10. If you want to use proportional fonts, you may have to edit certain reports because of the way proportional fonts look compared to fixed pitch fonts. If you use proportional fonts, we recommend running each report to verify that the output looks the same as it did in Version 10. In our testing, most reports printed the same using proportional fonts as fixed pitch fonts with the exception of the Client Summary Report (CLNTSUM.RW and SYSTMSUM.RW). There were considerable alignment issues with the Client Summary Report due to the multiple column layout that is used. If you encounter issues with any of your reports, you have several alternatives:
 - You can edit the report using the Report Writer.
 - You can switch back to the fixed pitch font previously used. If you decide to switch back to the fixed pitch font, you may want to consider setting up a new printer configuration that will be used for fixed pitch font reports. This is an easy solution with detailed procedures in our Knowledge Base article R10776, “How to Set Up Separate Printer Configurations for the Same Printer”.
 - If the report is a standard report provided with PracticeMaster that your firm has not modified, the easiest way to fix it is to manually copy the new Version 12 report definition into your \CMREPORT folder.

Additionally, several reports in PracticeMaster have changed to reflect the new fields. You may want to modify existing report definitions to reflect the new fields. If the report is a standard report provided with PracticeMaster that your firm has not modified, the easiest way to update it is to manually copy the new Version 12 report

definition into your \CMREPORT folder. Manually copying the report definition is necessary because the conversion program does not overwrite any existing Version 11 report definitions in the event they have been customized. All Version 12 report definitions have been installed with the sample data in a folder named \TUTOR\CMREPORT under the Version 12 program directory.

► **To copy any default Version 12 report definition**

- a. Using Windows Explorer, rename the *.RW report file in the CMREPORT folder as a precautionary measure.
 - b. Copy the desired *.RW report file from the \TUTOR\CMREPORT folder to the \CMREPORT folder.
 - c. Start the PracticeMaster Report Writer and click the **Rebuild** button to rebuild the table of contents.
 - d. Run the report to verify that it looks okay. Be aware that any customization previously performed will no longer be present.
9. **PRACTICEMASTER PALM SOFTWARE:** If you are using the PracticeMaster Palm Software (i.e., not the PracticeMaster Palm Conduits), you will need to install the updated PracticeMaster Palm Software onto all handheld devices. To install the PracticeMaster Palm Software on a handheld device, from the **Start** button, select **Programs | Software Technology | Palm Software | Install PracticeMaster Palm App**. Once the files have been installed on the handheld, you will also need to create new Palm Application Data files in the host application and HotSync them to each handheld.
10. **PRACTICEMASTER BRIEFCASE:** If you use PracticeMaster Briefcase, you will need to install PracticeMaster Briefcase Version 12 on all computers that use PracticeMaster Briefcase.
11. **WORD DOCUMENT ASSEMBLY & HOTDOCS DOCUMENT ASSEMBLY:** You may want to review and modify any document templates that have a fee tickler. PracticeMaster now allows you to specify a variable for *Hours Worked* as well as *Hours to Bill* in any fee tickler.
12. **E-MAIL PREFERENCES:** The PracticeMaster E-mail program has been redesigned and must now be configured for each user and workstation prior to using it. Since e-mail can contain malicious programs, security options have been added to PracticeMaster. By default, E-mail Preferences for each user are configured with the highest security. Users assigned manager access rights in System Configuration can change these security options as desired. We recommend that your network administrator review the E-mail Preferences for all users. The PracticeMaster Help as well as our Knowledge Base Article R10998, “Customizing PracticeMaster E-mail Settings” provides additional information regarding E-mail Preferences.
13. **LOOKUP WINDOW COLUMN WIDTHS:** The lookup windows were changed to use the Field Name instead of the Field ID. As a result, you may find that you will need to resize some columns in various lookup windows to accommodate the adjusted column sizes. This can be done as needed.
14. **TASK FOLDERS:** The “Read E-mail” program is now simply called “E-mail” whereas the “Send E-mail” program has been removed from PracticeMaster. Therefore, if your main Task Folder was customized to include the “Send E-mail” icon, this spot on the Task Folder will be empty after the conversion.
15. **REBUILD CONFLICT OF INTEREST FILES:** The Conflict of Interest Search now allows search values to include periods (“.”) and “at” sign (“@”) characters. The Conflict of Interest Index Files must be rebuilt in order to find text with these characters. *(Note: This task may take some time to perform. You may want to wait to do this at a later time.)*

► **To rebuild the Conflict of Interest Index Files**

- a. From the PracticeMaster **Maintenance** menu, point to **Conflict of Interest** and select **Configuration**.
 - b. Make sure the **Rebuild Conflict of Interest Index Files** option is selected.
 - c. If desired, select the **Allow Phonetic Searching** check box. *(Note: Selecting this option requires even more time to complete the rebuilding process.)*
 - d. Click **OK**.
16. **PROCESS TIMER RECORDS:** The first time you open the Process Timer Records window, all e-mail journal records will be shown in the window. This is because you can now create fee records from e-mail journal records.

Tab3 Version 8 Notes

Note: The conversion notes in this section apply only to conversions from Tab3 Version 8. If you converted from Tab3 Version 9, or if you do not have Tab3, please skip to the **Notes for ALL Systems** section.

Key Type: The Key Length has been split into two separate fields called Key Type and Matter Length. Version 12 converts all Key Types as Numeric and converts the Matter Length based on the portion of the Key Length following the decimal.

Phone Numbers: Tab3 Version 8 had two phone number fields (Phone and Other Phone). Version 12 has four phone number fields with customizable labels. The default labels are Office Phone, Home Phone, Fax Phone and Cellular Phone. By default, the conversion converts the information in the Version 8 Phone field to the Phone 1 (Office Phone) field. It also converts the information in the Version 8 Other Phone field to the Phone 3 field (Fax Phone). However, you have the option to map the phone numbers differently when converting.

General Ledger Integration: Tab3 Version 8 allowed you to specify the data path of the GLS client used for integration. Version 12 of Tab3 simply lets you specify which GLS client is used. By default, the conversion program specifies the first GLS client with the GLS data path specified in Tab3 Customization. Start Tab3 Customization to verify that the correct GLS client is specified for integration purposes *before* Tab3 Version 12 is used to enter costs or payments.

Billing Frequencies: Version 12 includes a separate data file for Billing Frequencies. You may want to open this file and add descriptions for the various billing frequencies your firm uses (*File | Open | Miscellaneous | Bill Freq*).

Statement Templates: Version 12 uses Statement Templates for specifying billing formats. Instead of applying all billing format codes to each client, you now create statement templates and then assign a statement template for draft statements and final statements to each client. This is done on the **Statement Options** tab of the client program in the **Final Template** and **Draft Template** fields. A separate statement template is created during the conversion process for every combination of billing codes your firm uses. By default, the conversion program names these statement templates 00000001, 00000002, 00000003, etc. You may want to examine the automatically created statement templates using the Statement Template program to familiarize yourself with this new method of assigning billing formats (*Statements | Statement Setup | Statement Templates*). You can also access the Statement Template program by right-clicking on the **Final Template** or **Draft Template** fields in the Client file and selecting the Edit Statement Template menu option. While using the Statement Template program, you may want to edit the assigned descriptions for the various statement templates that were created during the conversion. It may be useful to print a list of statement templates (*Reports | Miscellaneous | Statement Template List*). If desired, you can easily rename the statement templates using the Rename Statement Template program (*Statements | Statement Setup | Rename Statement Template*). Alpha characters can be used in the statement template name. You can also globally assign statement templates to clients using the Change Client Options program (*Maintenance | Client Related | Change Client Options*).

Text Macros: Version 12 includes expandable text macros that let you enter an abbreviated form of a phrase or word during data entry that will automatically expand the abbreviation into the full phrase. As an option, the conversion program will create text macros based on existing transaction codes. If you selected this option, we recommend that you print a Text Macro List at this time and edit the text macros as required (*Reports | Miscellaneous | Text Macro List*). For example, a transaction code for “Letter to” with the alpha code of “LT” will expand to “Letter to” every time the word “It” is typed with a space before it and after it.

Statement Note: Tab3 Version 12 now allows optional section headings to be printed on statements for Fees, Expenses, Advances and Payments. The conversion program converts these heading lines as blank lines so that no headings will be printed. If you want to print the optional headings, you should enter the appropriate headings on the **Terminology** tab in Statement Customization (i.e., Fees—Line 9, Expenses—Line 25, Advances—Line 27, Payments—Line 32). To access Statement Customization, select the **Statements** menu and point to **Statement Setup**, then click **Statement Customization**.

Retainers & Client Funds: A new Client Funds feature replaces the retainer billing feature found in Tab3. Where Tab3 Version 8 allowed you to bill for retainers and keep track of the retainer amounts due, the new version expands upon this by tracking all history for the client funds account as well as maintaining a balance for the client funds account. Like Version 8, the new version lets you bill a client for a retainer or client funds account. However, Version 12 will calculate the amount due based on a target amount or a minimum balance (similar to the integration with TAS). In Version 12, a client can be configured as being a one time retainer so that once the target balance is reached, the client will not continue to be billed for the retainer.

Once the client has paid a retainer and has an amount in the client funds balance, Tabs3 can automatically transfer funds from the client funds balance to the client's account when a statement is run. You can even configure the automatic transfer to be for fees only, expenses only, advances only, costs only or for all charges.

When converting to Tabs3 Version 12, Tabs3 converts any retainer due amounts as client fund Target Balances. When the next statement is run, the statement will bill the client for that retainer amount due (based on the client's largest type of Retainer Due Amount). The conversion also automatically sets each client with a retainer amount due as having an Automatic Fund Application. This means that Tabs3 will automatically generate payments to the firm from the client funds account to apply to the current work-in-process charges when a final statement is run (provided the client has a client funds balance). You may want to edit the client's Fund Application located on the **A/R & Fund Balances** tab of the Client file.

Any work-in-process retainer transactions are deleted during the conversion. Use the Transaction File List for retainers printed in step #2 on page 5 to determine if any editing of the Target Balance is required. For example, if a client has a retainer balance due of \$500, then Tabs3 converts the \$500 as the client fund's Target Balance. If an additional retainer transaction of \$250 is in work-in-process but has not been billed, then the Target Balance must be edited to reflect \$750 after the conversion has completed. The Target Balance is located on the **A/R & Fund Balances** tab of the Client file.

All type 7 transaction codes (retainer tcodes) are also deleted during the conversion. If your firm will be using the client funds feature, we recommend that you create new transaction codes for client fund deposits and withdrawals. Use a Type of "0" (normal) for the deposit and withdrawal client funds transactions. Use any payment type tcode for the payment to firm transactions (*i.e.*, "1", "2" or "3"). Use the desired default description for the transaction. The information entered in the remaining fields does not matter since these fields are not used for the client funds transactions.

Notes for All Systems

Printing Reports to File: With the introduction of proportional fonts, it is not always possible for the file output to match the printed output or preview window. Therefore, we recommend setting up a special printer for generating print-to-file output. Configure this printer to use the **Optimize for Print to File** check box in the new Advanced Printing Features window to avoid missing information (*i.e.*, clipping issues). Additional recommendations for best results when configuring a printer for print-to-file output can be found in Help.

New Fields for Transactions: Version 12 now stores which User ID entered a transaction and the date and time it was entered or last edited. This applies to Tabs3 fees, costs, payments, and client funds; GLS journal entries; TAS trust transactions; and APS invoices and manual checks. For all existing transactions, the Date Entered is converted as the Transaction Date and the User ID is set to STCONV11 to indicate the transaction was converted from an earlier version.

International Phone Number Fields: Version 12 now supports international phone number fields.

Longer E-Mail Fields: Version 12 now supports longer e-mail fields of 100 characters each.

Tabs3 & Tabs3 Remote Spell Check: The third party spell check software we use (*i.e.*, Wintertree's Sentry Spell Check) has been updated to the most current version and required a conversion of the dictionary files. Because dictionary file locations are stored in the registry for each workstation, the actual conversion occurs the first time each workstation starts Tabs3 or Tabs3 Remote. It is quite possible that other applications on the workstation may use Sentry Spell Check dictionaries. If you encounter any problems with spell checking in other applications, call our Technical Support Staff.

Automatic Spell Check Option: Automatic spell checking can now be configured at the workstation level as opposed to being configured as a system-wide option. After the conversion has completed, this option will be enabled for all workstations. If you want to disable this option for a workstation, from the **Maintenance** menu, point to **Dictionary Maintenance**, and select **Spell Check Options**. Clear the **Automatic spell check when adding transactions** check box.

Spell Check as You Type Option: The new **Spell Check as You Type** option is configured at the workstation level. When enabled, this feature will show misspelled words with a red underline while typing. After the conversion has completed, this option will be disabled for all workstations. If you want to enable this option for a workstation, from the **Maintenance** menu, point to **Dictionary Maintenance**, and select **Spell Check Options**. Select the **Automatic spell check as you type** check box.

PracticeMaster Notes

Related Party Categories: PracticeMaster now allows up to 8 different related party categories to be assigned to each related party record.

Tabs3 Notes

Alpha Key Type: Like Version 9, Tabs3 Version 12 can be configured to use alpha client numbers. However, any cost recovery systems that integrate with Tabs3 may require a Numeric Key Type.

Archive Path: The Archive Path has been removed from Version 12; therefore, Tabs3 no longer supports multiple sets of archive data files. If you have more than one set of archive files that you would like merged into your current archive files, contact our Conversion Programming staff for a price quote.

Statement Setup: A new field called “Compress Address” has been added to Statement Setup (*File | Print Setup | Statement Setup*). This feature eliminates any blank lines due to unused address lines. By default, this feature is enabled. However, if you want the information following the address to always print at a fixed position on the page, you will need to disable this feature. For example, if your firm uses preprinted forms with a preprinted line between the Address and the Work Description and you want the Work Description to always print in the same position, then you must clear this check box.

Write-Up/Write-Down Figures: The manner in which write-up/write-down amounts and hours and courtesy discounts are reported has been enhanced on various reports to provide the ability to better analyze write-down and discount amounts. Several reports now include a value for the hours written up or down. Courtesy discounts are now shown separate from write-downs. Reports that have been changed include the Detail Work-In-Process Report, Client Productivity Report, Client Ledger Report, Write-Up/Write-Down Report, Timekeeper Productivity Report, and Category Productivity Report. The What’s New in Version 12 List provides details regarding the changes implemented for each report.

GLS Notes

GLS Custom Report Writer: Tabs3 General Ledger Custom Report Writer Version 12 is now a Windows program. GLS Custom Report Writer is not available in DOS. If your firm uses GLS Report Writer, it will have been included on the CD-ROM and installed when GLS Version 12 was installed. To access GLS Custom Report Writer Version 12, from the **Reports** menu in GLS, select **Report Writer**.

Budget Figures: GLS now allows 24 months of budget figures for income and expense accounts, as opposed to 12 months. The conversion program copies the current 12 months of figures into the previous 12 months of figures by default. You may want to edit the budget figures if you would like to have accurate comparisons on Income Statements for the previous year.

Reconciliation: The Reconciliation program has been completely redesigned to allow for reconciliation of deposits. Special procedures for the first time you reconcile your checking account using the new Reconciliation program can be found in our Knowledge Base at www.support.Tabs3.com in Article R10927, “Performing an Initial Reconciliation in GLS”.

APS Notes

Vendor E-Mail Field: The Vendor file now has an e-mail field. You may want to enter e-mail addresses for various vendors in this field.

Version 8 Users Only:

Amount to Pay = 0 Errors: Invoices that have zero in both the **Amount** and **Amount to Pay** fields will be placed on

Hold by the Version 9 conversion program. An entry will be made to the conversion error list (WCONV9.LOG) each time this occurs. If the invoice was not placed on hold, it would be combined and paid with other invoices if the vendor's **One Check Per Invoice** check box is cleared. Invoices entered in Version 8 with zero in both the **Amount** and **Amount to Pay** fields were most likely entered by mistake. These entries should be reviewed and probably deleted.

Version 8 Users Only:

GLS Integration: Previous versions of APS Customization allowed you to specify the data path of the GLS client used for integration. Version 12 of APS simply lets you specify which GLS client is used. By default, the conversion program specifies the first GLS client with the GLS data path specified in APS Customization. Start APS Customization to verify that the correct GLS client is specified for integration purposes.

TAS Notes

Alpha Search: TAS users that integrated with Tabs3 Version 9 when configured for an alpha Key Type used the TAS Name Search field to hold the Tabs3 alpha Client ID as a work around. The TAS Trust Account Number will automatically be changed to the Tabs3 alpha Client ID during the conversion. Likewise, the TAS Name Search field will automatically be changed to the Tabs3 Name Search during the conversion.

Tabs3 Integration: Previously, it was possible to use the same TAS Trust Account # / Tabs3 Client ID for different clients. This is no longer possible in Version 12 because of the new synchronization feature. The conversion program compares the client name fields [i.e., Name (Last/First)] for any clients with the same TAS Trust Account # and Tabs3 Client ID. If the conversion program encounters a client with the same number but names that have a difference of even one character, it will renumber the TAS trust account to the next available number and then synchronize it to Tabs3, thereby retaining both accounts in both systems. A message will be written to the STCONV10.LOG file indicating that the trust account was renumbered. In some situations, you may not want a new trust account number for the trust account. If renumbering the trust account in TAS was not the desired outcome (due to the name fields being slightly different, e.g., Charles Miller and Charles C. Miller), the client can be renumbered. Renumber the TAS trust account back to the original trust account number in TAS using the Renumber Trust Account program. It will then be necessary to manually change the Name Search field in TAS to match the Tabs3 Name Search field after renumbering. After the renumber is complete, log into Tabs3 and delete the Client ID created by the conversion program.

Print Memo On Checks: A new field called **Memo** has been added to TAS in the Trust Transaction data entry program. You can optionally print this **Memo** field on the check. In order for the **Memo** field to print on the check, you must configure the check printer to do so.

► **To configure a TAS check printer to print the Memo field on a check**

1. Start TAS.
2. From the **File** menu, select **Print Setup**.
3. Select the desired check printer and click the **Check Setup** button.
4. Select the **Print Memo on Checks** check box.
5. Click **OK** to save the setting.
6. Click **OK** to close the Printer Setup window.

NEW - Free PracticeMaster Basic System

A free copy of PracticeMaster Basic is included with every Tabs3 Version 12 system. PracticeMaster includes calendaring, case management and contact management. It does the things you already have to do, only faster. This is an ideal time to install and try out PracticeMaster Basic.

Tip: Want more information about PracticeMaster Basic? Interested in the advanced practice management features of PracticeMaster Premier? Check out our Web site at www.PracticeMaster.com.

Instructions to install PracticeMaster Basic can be found in our Knowledge Base on the Internet at www.support.PracticeMaster.com in Article R11027, Installing Your FREE Copy of PracticeMaster Basic.

Tip: Not sure where to start? You can install the Demo and/or Multimedia Tutorials from the CD-ROM to learn more about PracticeMaster. If you prefer, a written “hands-on” tutorial is automatically installed when the Documentation is installed. Have questions? Call our Technical Support Staff at (402) 423-1440. Our trained representatives will be happy to answer your questions. Give PracticeMaster a try. It may be just what you’ve been looking for.

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