




Outlook Plug-in Quick Guide

*Getting you up
to speed quickly.*



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Software Technology, Inc.
1621 Cushman Drive
Lincoln, NE 68512
(402) 423-1440
<http://www.Tabs3.com>

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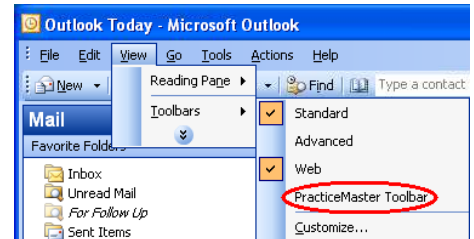
Version 15.3 (July 2009)

Quick Guide to the Outlook Plug-in

The Outlook Plug-in is the perfect tool for PracticeMaster users who want to work in Outlook for e-mail purposes. The Outlook Plug-in provides a means of tracking **all** case-related and business e-mails in a centralized location while still using Outlook. This guide will tell you everything you need to know about using the Outlook Plug-in!

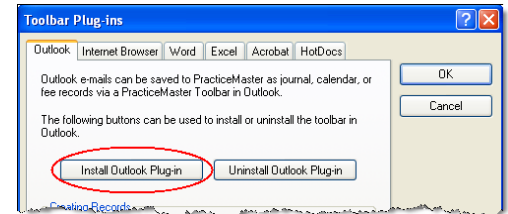
GETTING STARTED

Typically, the Outlook Plug-in is installed simultaneously with PracticeMaster. However, the first thing you need to do is check if the Outlook Plug-in has already been installed. To do this, open Outlook and from the Outlook **View** menu, select **Toolbars** and look for **PracticeMaster Toolbar**. If it is not there, you must install the Outlook Plug-in to continue. If it is already there, make sure there is a check mark next to it, then simply skip to the Using **Outlook Plug-in** section.



HOW TO INSTALL THE OUTLOOK PLUG-IN

To install the Outlook Plug-in, open PracticeMaster. From the **Maintenance** menu, point to **Integration** and select **Toolbar Plug-ins**. On the Outlook tab, click **Install Outlook Plug-in**, as shown in the figure on the right. Once the Outlook Plug-in has been installed, restart Outlook.




USING OUTLOOK PLUG-IN

When you open Outlook, a **PracticeMaster Toolbar** option will be available as indicated in the top figure above. When there is a check mark, the toolbar will appear and allow you to save any e-mail message in Outlook to PracticeMaster, whether it is a received message or a sent message. These e-mail messages can be saved as Journal records, Calendar records, and Fee records.

RECEIVING E-MAIL MESSAGES: JOURNAL BUTTON

To create a PracticeMaster journal record from a received e-mail, all you have to do is select or open the e-mail message and click the **PM Journal** button. This will open a new PracticeMaster Journal window with the information from the e-mail already filled in, as shown on the right.




If desired, you can click the **Details** button to add comments regarding the e-mail. Click the  Save button (or press **Ctrl+S**) to save the journal record to PracticeMaster.



RECEIVING E-MAIL MESSAGES: CALENDAR BUTTON

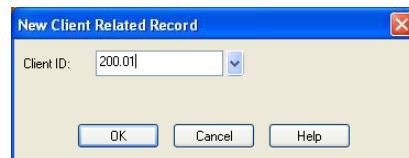
To create a PracticeMaster calendar record from a received e-mail, all you have to do is select or open the e-mail message and click the **PM Calendar** button. This will open a new PracticeMaster Calendar window with the information from the e-mail already filled in, as shown on the right.




If desired, you can add comments regarding the e-mail. Click the  Save button (or press **Ctrl+S**) to save the journal record to PracticeMaster.

RECEIVING E-MAIL MESSAGES: FEE BUTTON

To create a PracticeMaster fee record from a received e-mail, all you have to do is select or open the e-mail message and click the **PM Fee** button. This will open a PracticeMaster window requesting that you enter the Client ID associated with the e-mail. Once you have entered a Client ID, click **OK**. A new PracticeMaster Fee window will open with the information from the e-mail already filled in, as shown on the right.

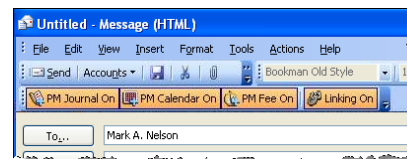


If desired, you can add comments regarding the e-mail. Click the  Save button (or press **Ctrl+S**) to save the fee record to PracticeMaster.



WHEN SENDING E-MAIL MESSAGES

When creating a new e-mail message, replying to a message, or forwarding a message in Outlook, the **PM Journal On**, **PM Calendar On**, and **PM Fee On** buttons will appear in the toolbar. The figure to the right shows the **PM Journal On**, **PM Calendar On**, and **PM Fee On** buttons in a new e-mail message. Once the e-mail is sent, a PracticeMaster Journal window will be displayed allowing you to save the e-mail as a new Journal record in PracticeMaster, followed by a PracticeMaster Calendar window, and then a PracticeMaster Fee window. If you don't want to save the e-mail in PracticeMaster, simply close the records without saving them, or click each of the toolbar buttons so they read **Off** instead of **On**.



LINKING E-MAIL MESSAGES

When creating a new PracticeMaster record from an Outlook e-mail, you can create multiple Journal, Calendar, and Fee records. Only one of each can be linked to the e-mail message by clicking the **Linking On** button. However, by turning the **Linking Off**, you can create unlimited PracticeMaster records that are created from, but not linked to, the Outlook e-mail.



As you can see, the Outlook toolbar is user-friendly, easy to install, and even easier to use. It allows you to save your Outlook e-mail messages in PracticeMaster without leaving Outlook, and create Fee and Calendar records, too! With just a click of a button, you can let PracticeMaster file your e-mails so all client-based e-mails are stored in PracticeMaster and accessible by all PracticeMaster users that have rights to the client. Once in PracticeMaster, right-click the journal record and use the **Convert To Fee** option to bill the client as desired; or simply create a fee record from the e-mail.

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For more information:

www.PracticeMaster.com

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