Instructions for Updating PracticeMaster Version 12.1.1 Systems to Version 12.1.2

Dear Version 12.1.1 Software User,

We are pleased to announce that we have made additional modifications to Tabs3, PracticeMaster, and Tabs3 Financial Software since Version 12 was released. The following list includes highlights of the various features implemented in Version 12.1.2.

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- Added the ability to optionally display a new **Related Parties** tab in the Client file that lets you quickly view all related parties associated with a specific client. A summary format lists related parties whereas a detail format lists related parties and shows the file and field name for each linked record. A SnapShot of the selected Related Party is shown in both formats and selecting an associated record in detail format displays a SnapShot for that record.
- Added the ability to optionally display separate tabs in the Client file for each Area of Practice file associated with a client. This feature is enabled in the Configure Client Pages window, which is accessed from the **Edit** menu. Once configured, after selecting a client and clicking on any tab in the Client Editor window, separate tabs for each Area of Practice file will be shown. *(This is a PracticeMaster Premier feature.)*
- Added the ability to optionally display separate tabs in the Client file for all user defined Common Client Related files. This feature is enabled in the Configure Client Pages window, which is accessed from the **Edit** menu.
- Added a new **RP Usage** tab to the Related Party file that lets you quickly view all references in the PracticeMaster data files to a specific related party. Clicking any reference will display the SnapShot of the associated record.
- Added the ability to remember the last filter used when a window is closed and then apply that filter to the window the next time the window is opened. Additionally, when toggling a filter on and off, the last filter used is always remembered.
- Added the client name and related party name and organization to the address block of the SnapShot files making it easy to copy and paste the entire name and address to other programs such as Microsoft Word.
- When adding variables in a Word template for Word Document Assembly, added the ability to remember the last position in the file tree when selecting variables until the Document Assembly window is closed. *(This is a PracticeMaster Premier feature.)*
- Many minor modifications have been made to PracticeMaster E-mail and the PM Link feature. For example, the PM Link button is now shown when Outlook is configured to use Word as the default e-mail editor.
- Various minor modifications have been made to Outlook, GroupWise, Word, Exchange Server, WORLDOX, and QuickBooks integration.

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- Added the client name to the address block of the SnapShot file making it easy to copy and paste the entire client name and address to other programs such as Word.
- Various minor modifications have been made to the Statement Designer.

Your local Tabs3 reseller or consultant, 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 update.

Procedures

After you have installed Version 12.1.2, there are a couple of steps that must be performed in order for the new features to be available in PracticeMaster. Use the following procedures to update PracticeMaster Basic or PracticeMaster Premier from Version 12.1.1 to Version 12.1.2.

1. Start PracticeMaster.

2. From the **Utilities** menu, select **Reindex Files**. You will be asked if you want to make a backup.
   a. Click **Yes** when asked if you want to make a backup.
   b. Click **OK** to start the backup.
   c. After the backup has completed, click **OK** to close the “Back Up Successful” message box.

3. Click the **Select Files** button to select specific files to reindex.

    a. Click the **Lookup Files** folder to open it and then select the **Related Party** file. A red check mark will be displayed on the file when selected.
    b. Click the **Miscellaneous Support Files** folder to open the folder and then select the **E-Mail Attachments** file. A red check mark will be displayed on the file when selected. *(Note: If this file is not shown in the Miscellaneous Support Files, simply skip this step.)*
    c. Click **OK** to close the Select Files window.

4. Select the **Compact Selected Files** check box.

5. Click **OK** to start the reindexing process.

6. Click **OK** to clear the Task Completed message.

7. Click **Close** to close the Reindex Files window.

PracticeMaster Premier Users

Perform the following steps if you are using PracticeMaster Premier.

1. From the **File** menu in PracticeMaster, point to **Open** and select **Client**.

2. While on the **List** tab, from the **Edit** menu, select **Configure Client Pages**.

3. If desired, select the **Area of Practice Pages** check box.

    > **Windows 98/Me Note:** Depending on what other software is being run while using PracticeMaster, this option requires more system resources than may be available. KB Article R11021 in our Knowledge Base on the Internet at www.support.tabs3.com, "System Resources on Windows 98/Me", discusses the basics of system resources in Windows Me and Windows 98 operating systems, as well as how system resources will affect software performance, particularly in relation to the performance of Tabs3 and PracticeMaster software.

4. Click **OK** to close the Configure Client Pages window.

Try Out the New PracticeMaster Features

1. From the **List** tab in the Client editor window, click the **Related Parties** tab. All related parties associated with the client will be displayed.

    a. If no related party is shown for the selected client, use the F3/F4 keys to select a different client; or click the **List** tab to select a different client.
    b. From the **Related Parties** tab, click the **Summary** option.

2. From the Task Folders, click the **Related Parties** icon to open the Related Party file.

    a. Click the **RP Usage** tab. All records in which the selected related party is used will be displayed.

PracticeMaster Briefcase Users

All PracticeMaster Briefcase users must also update their program files. If Briefcase users do not update their Briefcase program files at this time, any future e-mail journal record attachments checked in after the host system's program files are updated will be inaccessible.

If a Briefcase user has data that was checked out *before* the host system was updated and reindexed, the Briefcase user must also follow the steps above in the "PracticeMaster Users" section *after* installing the new program files. Otherwise, if e-mail journal records created in Briefcase have attachments and are checked into the host system, the attachments will be inaccessible.

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