What's New List for Version 15.3
of PracticeMaster and Tabs3 Financial Software

Tabs3 Trust Accounting Software (TAS)

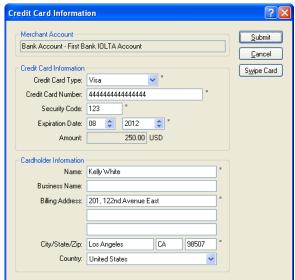### Tabs3 Trust Accounting Software Credit Card Authorization

- Added the ability to authorize credit card deposits in Tabs3 Trust Accounting Software. *(The ability to authorize credit card payments in Tabs3 was available in Version 15.1.)*
- Tabs3 works with First National Merchant Solutions® (FNMS), a subsidiary of First National Bank of Omaha, to provide merchant accounts for use in Tabs3 and Tabs3 Trust Accounting Software. **The FNMS account will work with your existing bank account.**
- Save money with low, negotiated processing fees for Tabs3 users.
- Lets you avoid the hassle of collecting past due bills by offering the convenience of credit card payments to your clients.
- Processing fees are debited from the designated account once a month instead of for each transaction for easy reconciliation.
- Tabs3 Trust Accounting Software lets you assign merchant accounts to each bank account. We have worked with FNMS to allow you to designate a separate bank account (such as your operating account) for debiting processing fees, thus providing the ability to properly handle trust funds.
- The types of credit cards accepted can be defined for each merchant account and include Visa®, MasterCard®, Discover®, American Express®, and Diners Club®.
- For ease of use, Tabs3 Trust Accounting credit card authorization supports integration with Magtek® Magstripe Mini Swipe (USB) credit card readers. Using a card reader may also reduce the fees for a credit card transaction.
- Tabs3 Trust Accounting encrypts and transmits cardholder data to FNMS; however, Tabs3 Trust Accounting does not store sensitive cardholder information.
- Includes the ability to print a Credit Card Deposit Receipt when a credit card payment is authorized as well as at a later time.
- A Credit Card Authorization List lets you print a list of credit card transactions authorized via Tabs3 Trust Accounting Software for a specified time period. You can include charges, voids, credits, or any combination thereof. This report can be used to balance with your Settlement Reports on the FNMS Web site.
- The ability to authorize Credit Card transactions is provided with Tabs3 Trust Accounting Software at no charge, but requires a merchant account with FNMS that does require processing fees. For more information visit www.Tabs3.com/cci.

PracticeMaster Changes

New CompuLaw Integration

- Added support for CompuLaw Version 10 Rules Engine. Both PracticeMaster and CompuLaw products must be updated at the same time in order to receive new CompuLaw rules after December 1, 2009. *(PracticeMaster Version 15.2 or earlier requires CompuLaw Version 9 Rules Engine.)*

- Detailed information regarding the CompuLaw conversion can be found on our Knowledge Base on the Web at www.support.tabs3.com in KB Article R11303 – "Version 15.3 CompuLaw Conversion Information".
- Added support for CompuLaw User-Defined Rule Sets, allowing you to add extra items in CompuLaw to Rule Sets beyond what the courts require and now have those items recognized by PracticeMaster.
- Consolidated the **Process** and **Combine** functions in the Generate CompuLaw Dates program. PracticeMaster will now always check for related CompuLaw Calendar Plans when processing a plan, and ask you to confirm whether you want them combined.
- Improved the CompuLaw Date Maintenance confirmation window for easier use and added the ability to resize the window. Additionally, only records with a Due Date greater than the current system date are included in the window, thus providing faster performance and a filtered list with only the records that will be changed.
- Combined the access rights for CompuLaw integration. Previously, any user that had rights to PracticeMaster could run the Generate CompuLaw Dates program and only managers could run CompuLaw Date Maintenance. Now, users must have access rights to Process Plan Templates (in the Calendar area) in order to access either of these programs. Access rights are defined via the Access Profile in System Configuration.
- Modified the Calendar Plan Report so that the entire Comments field prints instead of the 128-character Description field for calendar plans created by the Generate CompuLaw Dates program. *(Version 15.2)*

Improved Outlook Calendar Integration

- Even faster performance for Exchange Server integration, especially for hosted Exchange Server users; and for those who do not have Outlook open and running all day.
- Performance improvements include the following operations, especially when they affect multiple calendar records:
  - o Calendar Plan Templates
  - o Generate CompuLaw Dates
  - o Adding, Changing, or Deleting Recurring Entries
  - o Adding, Changing, or Deleting Linked Calendar Records
  - o Deleting Multiple Records
  - o Import Data Wizard

What's New List for Version 15.2
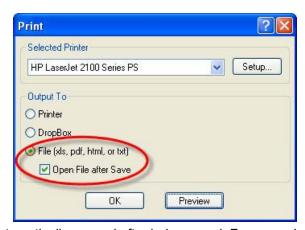# of Tabs3, PracticeMaster, and Tabs3 Financial Software

All Software

New Excel Output Capability
- Added the ability to save any report to an Excel file (XLS or XLSX).
- Optimized many reports for Excel output, as listed at the end of this document.

New Copy List to Clipboard
- Added the ability to copy records from any list to the Windows clipboard (Ctrl+C). The output is optimized for Microsoft Excel and Word formatting, but can be pasted (Ctrl+V) into any program.

Improved Print Dialog
- Revised the Print Dialog window to allow files to be automatically opened after being saved. For example, if you save a report to an Excel file and select the new **Open File after Save** check box, the file will be saved to your designated location and opened automatically in Excel.

Expanded Autofill Capabilities
- As you enter characters into any lookup field, a list of possible choices matching the characters entered will be displayed, allowing you to easily select the entry you want to complete the field.

Improved DropBox
- When exiting the software, a message is now displayed if files are still present in the DropBox.

Tabs3 Changes

New Top Client Report
- Added a new Top Client Report that lets you print a report of your top clients in Tabs3 based on your preferred criteria.
- Include up to seven amount columns from work-in-process information, billed information, a combination of work-in-process and billed information, write offs, paid information, unallocated payments, and current amount due.
- Select the number of top clients or matters, the desired time period, and the ranking column.
- Sort by category or primary, secondary, originating, or working timekeeper to create separate top client lists for each category or timekeeper.
- Optionally include percentages for each matter or client for individual sort and grand totals.
- Optionally include a total amount for clients not included on the report for comparison purposes based on the ranking criteria.
- Optionally use fee compensation amounts when sorting by working timekeeper.

WIP Hours to Bill
WIP Hours Worked
WIP Fees
WIP Expenses
WIP Advances
Total WIP

Billed Hours
Billed Hours Worked
Billed Fees
Billed Expenses
Billed Advances
Finance Charges
Total Billed

All Hours to Bill
All Hours Worked
All Fees
All Expenses
All Advances
Total WIP + Billed

Write Offs

Fees Paid
Expenses Paid
Advances Paid
Finance Charges Paid
Unallocated Payments
Total Paid

Current Amount Due

Enhanced Batch Statements as PDFs

- Added the ability to generate batches of statements as individual PDF files.

Statement Options

- Reorganized the **Options** tab of the Generate Statements program to ease workflow and allow for additional options when printing statements.
- Changed how statement numbers print on cover statements when using the Statement Designer.

Enhanced Write Off Options

- Added the ability to write off a specific timekeeper on a single statement.
- Added the ability to write off a specific portion of the entire balance. For example, you now have the ability to easily write off all Finance Charge for the entire balance.
- Added the ability to write off a specific amount for a specific timekeeper.

Improved Summary Work-In-Process Report

- Credits now print as separate line items and are no longer combined with payments.
- The Fee, Expense, and Advance columns now show work-in-process before credits, total credits, and subtotals.
- The Hours to Bill column now shows work-in-process hours, total credit hours, and a subtotal.
- The Current Balance column now shows the balance before credits, total credits, and balance after credits.

Improved Fee Compensation Rules Report

- Added a new option that provides the ability to print a report of clients with no Fee Compensation Rules defined, thus making it easy to identify which clients do not have rules.
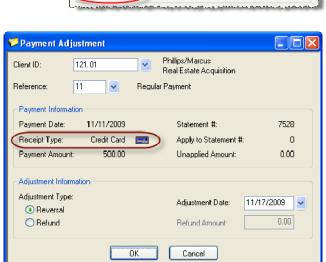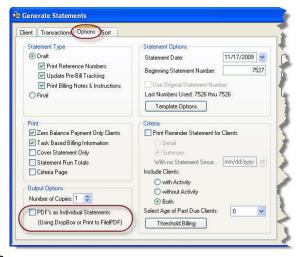
Cash Receipts Report

- Added the ability to include the **Receipt Type** on the Detail Cash Receipts Report to make it easy to identify whether a payment is cash, check, credit card, client funds, or other. When this option is selected, a new **Type/Check #** column prints on the report.

Payment Adjustment Program

- Added the **Receipt Type** to the Payment Adjustment window. When a credit card payment is selected, clicking the button to the right will open the Credit Card Information window.
- Reorganized the information on the window for ease of use.

PracticeMaster Changes
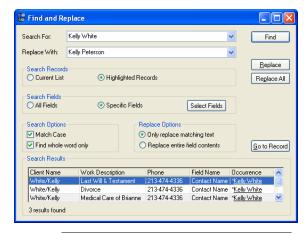
New Find and Replace

- Added a new Find and Replace feature that can be used to find and/or replace text in individual records of a file. This feature provides the ability to:
  - Search all fields, or search only specific fields.
  - Search all records in a list, or search only highlighted records.
  - Search partial words, or search only whole words.
  - Optionally match the case of the searched term.
  - Replace all occurrences at once, or replace occurrences one at a time.
  - Replace only the matching text, or replace the contents of the entire field.
- Results are shown in a list with the found text underlined. You can easily open any record in the results list by double-clicking or highlighting the record and clicking the **Go To Record** button.
- A count of results is shown.
- When replacing text in multiple records, a log of all changes is shown and can be printed as a report.
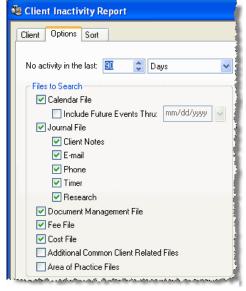
New Client Inactivity Report

- Added a new Client Inactivity Report that lets you easily identify clients and cases with no activity in a specified time frame. This report helps prevent cases from falling through the cracks and makes it easy to identify cases that should be marked inactive.
- You can specify the period of inactivity as the last number of days, weeks, months or years.
- Added the ability to load and save report definitions as well as designate a default report definition for this report.

New Word, Excel, and Adobe Plug-ins

- Work with documents in Word, Excel, or Adobe Acrobat/Reader, and save them as Document Management records in PracticeMaster.
- Create Journal, Calendar, and Fee records while working with a document in Word, Excel, or Adobe Acrobat/Reader. Fee records are then automatically synchronized to Tabs3 for billing purposes.
- Use the **PM Open** button in Word, Excel, and Adobe Acrobat/Reader to open PracticeMaster and select a Document Management record to view or edit.
- Use the **PM Save** button in Word, Excel, and Adobe Acrobat/Reader to add a new document management record, open an already linked document management record, or update the conflict of interest and document search indexes in PracticeMaster. Previously, once a document management record was created, any changes to the linked document were not included until the search indexes were manually rebuilt.
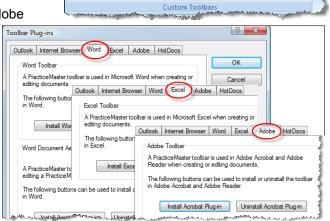
Improved Word Document Assembly
- Creating Document Management records during Word Document Assembly now automatically includes the assembled document name.
- PracticeMaster no longer needs to be open prior to creating templates in Word. The Word Document Assembly Toolbar buttons will launch PracticeMaster, and then initialize what they were designed to do.

Improved Calendar
- When adding an event or task from the calendar and ALL is selected for the User, the default behavior has been changed such that the User/Group field defaults to blank instead of ALL for the new record. *(Version 15.1)*

CompuLaw Calendar Plan Report
- Modified the Calendar Plan Report so that the entire Comments field prints instead of the 128-character Description field for calendar plans created by the Generate CompuLaw Dates program.
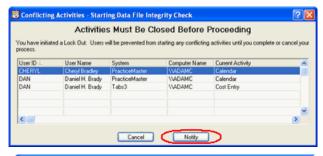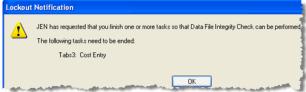
Conflict of Interest & Document Search
- Improved searching to allow searches for multiple occurrences of the same word.

Client Server Versions (CSV)

Lockout Notification in Conflicting Activities Window
- Added a new **Notify** button to the Conflicting Activities window that informs logged in users that a lockout has been initiated. Previously, logged in users did not know about the lockout until after attempting to start another task (or they were informed through other means). Clicking the **Notify** button immediately sends a message to all logged in users requesting that they exit the software (or return to the Task Folders) so that the exclusive task can be started. The **Notify** feature is only available in Client Server Versions (CSV).

eNote
- Added a new **Open PracticeMaster** toolbar button to the eNote toolbar that restores the main PracticeMaster window. The eNote feature is only available in PracticeMaster Premier Client Server Version (CSV).
- An eNote created using the **eNotify** feature now automatically includes select information based on the record from which it was created. The fields added to the message differ depending on the record type.

Tabs3 Accounts Payable Software (APS)

1099 Report, Forms, and Disk File
- Simplified the 1099 output options by removing the Data Source option. Amounts are now retrieved from the invoice file, thereby eliminating year-to-date timing issues that occurred with using the Vendor Analysis Totals.

Excel Output to File

- All reports can be output in one of two Excel formats: **Excel 2007 (*.xlsx)** or **Excel 97-2003 (*.xls)**.
- A **Remove Formatting when Saving to Excel** check box has been added to the Advanced Printing Features window. This option is selected by default and will remove all font size adjustments and styles (i.e., point size changes, bold, red, italics, and gray text), number formatting (i.e., commas, percent signs, trailing zeros, and currency), gray and black lines, and shading.
- Saving a report to Excel without previewing it will save the report without subsequent page headings.
- Use the *Excel* option when you want to manipulate the data in a spreadsheet. Otherwise, use the *PDF* option when you simply want a formatted report.
- When saving an Excel report to the same file name, instead of overwriting the file, the new report will be saved to a new worksheet in the existing Excel file, thus making it easy to save monthly reports in the same Excel file in different worksheets.
- Additional information regarding the new Excel output feature can be found in KB Article R11280, "All About Outputting Tabs3 and PracticeMaster Data to Excel" *(www.support.tabs3.com)*.
- The following reports have been optimized for Excel output:

Tabs3
- Allocated Payments Report
- Cash Receipts Report
- Client Ledger Report
- Receipt Allocation Report
- Timekeeper Analysis Report
- Timekeeper Realization Report
- Top Client Report
- Transaction File List
- Unallocated Payments Report
- Data Entry Lists (Fee, Cost, Payment, and Client Funds files)
- All Tabs3 Report Writer reports

PracticeMaster
- All PracticeMaster Report Writer reports
- Client Inactivity Report
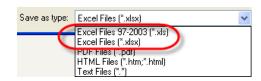
Tabs3 General Ledger (GLS)
- Balance Sheet
- Budget Report
- General Ledger Report
- Income Statement
- Journal Report
- Trial Balance Report
- Data Entry Lists (Journal file)
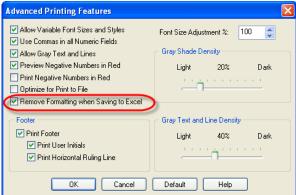- All GLS Report Writer reports

Tabs3 Accounts Payable (APS)
- Data Entry Lists (Invoice/Manual Check file)

Tabs3 Trust Accounting (TAS)
- Data Entry Lists (Trust Transaction file)

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What's New List for Version 15
of Tabs3, PracticeMaster, and Tabs3 Financial Software

New Vista Compatibility

- Implemented significant "behind-the-scenes" enhancements to provide seamless Vista compatibility.
- Employed Microsoft's best practices for Vista programming.
- Made it easier to run the Tabs3 and PracticeMaster software as a non-administrator.
- When User Account Control is enabled (UAC), a shield icon will be displayed for functions that require elevation. Users will automatically be asked for administrator credentials to perform these tasks.
- All functions in Tabs3 and PracticeMaster can now be run with UAC enabled, including Word Document Assembly in PracticeMaster Premier.
- The Tabs3 and PracticeMaster configuration file, STI.INI, has been moved from the protected Windows folder and is now stored in C:\Users\[userID]\AppData\Roaming\Tabs3 for Vista users (or if using Windows XP, in C:\Documents and Settings\[userID]\Application Data\Tabs3).

New Vista Compatible Help Files (All Systems)

- Help files are now provided in a Vista compatible format (i.e., CHM format).
- Changes to registry settings are no longer needed to access help on Vista computers.

New Custom Report Headings

- New custom report headings now available in Tabs3, General Ledger, Trust Accounting, and Accounts Payable.
- Report definitions include the ability to print the description as an additional heading line, thereby allowing you to provide additional information about the report without referring to a Criteria Page.

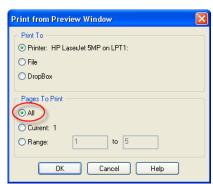## Autofill Feature (All Systems)

- Added autocompletion capabilities to all lookup fields in Tabs3, PracticeMaster, and Tabs3 Financial programs. As you type in a lookup field, the field will autofill based on the information entered.
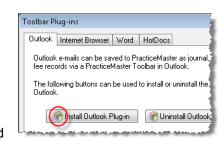
Incremental Search (All Systems)

- Added incremental search capabilities to *all* lookup windows. Previously, incremental search was only available in the Tabs3 Client lookup window and the PracticeMaster List windows. Now, incremental search is available in the User lookup window, the Timekeeper lookup window, the APS Vendor lookup window, the GLS journal entry lookup window, the TAS Trust Account lookup window, the TAS Payee lookup window, etc. For example, typing "T" while in the User lookup window will advance the list to the users that start with "T".
- When a lookup window is displayed, typing one or more characters will highlight the next record matching the characters entered.
- Incremental search works with whichever column the list is sorted by.
- Expanded the types of fields that incremental search will work with to include number and money fields.

New Print from Preview Window Default (All Systems)

- Changed the print default in the Print from Preview Window to *All Pages*. Previously, the default was the *Current* page.

New Zoom Function for Preview Windows (All Systems)

- Added enhanced zoom functionality to Preview Windows using the keyboard and the scroll function of your mouse. The following methods can be used to instantly control how large or small a report appears in the Preview window.
    - To enlarge the display in 5 percent increments
        - Press the **Ctrl** key while scrolling up
        - Press **Ctrl** + "**=**"
        - Press **Ctrl** + "**+**" *(on the number keypad)*
    - To reduce the display by 5 percent increments
        - Press the **Ctrl** key while scrolling down
        - Press **Ctrl** + "**–**"
    - To toggle between 100% and Fit to Window
        - Press **Ctrl** + "**Double-click mouse wheel**"
        - Press **Ctrl** + "**0**" (zero)
        - Press **Ctrl** + **Insert**

New Active User List Features (All Systems)

- Added a new column for **Computer Name** that displays the name of the computer at which each active user is logged in.
- Added new **Detail** and **Summary** options.
    - The **Detail** option displays task information for each active user.
    - The **Summary** option displays a single occurrence for each active user.
- Accessing the daily, weekly or monthly calendar or Task List in PracticeMaster will simply be displayed as "Calendar" for the Current Activity.

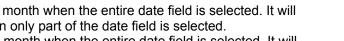## *New Popup Calculator (All Systems)*

- A new popup calculator allows you to add, subtract, multiply and divide in all numeric fields of all software (e.g., Rate, Amount, Units, and Hour fields).
    - Pressing "+" in a number entry field displays a calculator tape that expands as you add numbers.
    - Pressing "-" in a number entry field displays a calculator tape that expands as you subtract numbers.
    - Pressing "-" at the beginning of the number will make the number negative.
    - Pressing "*" in a number entry field displays a calculator tape that expands as you multiply numbers.
    - Pressing "/" in a number entry field displays a calculator tape that expands as you divide numbers.
    - Pressing "=" on the calculator tape will display the current total.
    - Pressing "Enter" or clicking out of the calculator tape will close the tape and display the total in the field.
    - Pressing "Esc" will close the calculator tape and will not update the total in the field.

New Date Field Conventions (All Systems)

- Improved date entry allows you to enter a date without specifying the year.
- Entering one or two digits when the date field is highlighted or empty will display the entered day with the current month and year.
- Dates can now also be entered in **MMDD**, **MM/DD**, **MM-DD**, **MM DD**, and **DD** format to simplify data entry.
- Pressing **T** (Today) enters the system date (in addition to **D**).
- Once a date has been entered, clicking a segment of the date will highlight that segment.

  - Pressing **+** increments the day of the month when the entire date field is selected. It will increment the selected segment when only part of the date field is selected.
  - Pressing - decrements the day of the month when the entire date field is selected. It will decrement the selected segment when only part of the date field is selected.

- o Pressing **PgUp** increments the month, whereas pressing **PgDn** decrements the month.
- o Pressing the **Up-Arrow** increments the day of the month, whereas pressing the **Down-Arrow** decrements the day of the month.

New Startup Behavior (All Systems)
- Attempting to start a second instance of the same program will bring the original instance to the foreground.

Installation Changes (All Systems)
- New installation process installs program files and help files on each workstation, thus providing improved loading time.
- Whenever the program files are updated on the server (usually by downloading updated programs via the Web), the program files on workstations will automatically be updated upon startup.

Support Log (All Systems)
- Modified the Support Log to separate out items that affect All Programs, such as Back Up Data Files and Restore Data Files. These items will print on a separate page.
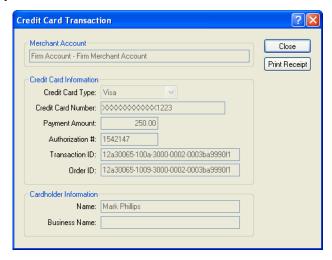
New Error Reporting Capabilities
- Created user friendly error messaging for troubleshooting purposes.
- Added the ability to submit error reports for analysis purposes, thereby providing overall increased performance and reliability.
- You can configure the software to send error reports automatically. Alternatively, you can send error reports on an individual basis or not at all. Reports are submitted anonymously and are used solely for quality assurance purposes.

Tabs3 Changes

Tabs3 Credit Card Authorization
- Added the ability to authorize credit card payments in Tabs3.
- Tabs3 is working with First National Merchant Solutions® (FNMS), a subsidiary of First National Bank of Omaha, to provide merchant accounts for use in Tabs3. First National Merchant Solutions is a top 10 payment processor with more than 50 years of experience providing first-rate credit card service and solutions to businesses across the nation. Tabs3 credit card payment integration works directly with PayFuse, the Internet payment processing solution provided by FNMS.
- You can use more than one merchant account. Tabs3 lets you assign merchant accounts to the firm, separate locations, and individual timekeepers or any combination thereof.
- The types of credit cards accepted can be defined for each merchant account and include Visa®, MasterCard®, Discover®, American Express®, and Diners Club®.
- For ease of use, Tabs3 credit card authorization supports integration with Magtek® Magstripe Mini Swipe (USB) credit card readers. Using a card reader may also reduce the fees for a credit card transaction.
- Tabs3 encrypts and transmits cardholder data to PayFuse; however, Tabs3 does not store sensitive cardholder information.
- Added the ability to print a Tabs3 Credit Card Payment Receipt when a credit card payment is authorized as well as at a later time.
- Added a new Credit Card Authorization List that prints a list of credit card transactions authorized via Tabs3 for a specified time period. You can include charges, voids, credits, or any combination thereof. This report can be used to balance with your Settlement Reports on the PayFuse Web site.
- The ability to authorize Credit Card transactions is provided with Tabs3 at no charge, but requires a merchant account with FNMS that does require

processing fees. For more information visit www.Tabs3.com/cci.

New Fee Recap Option
- Added a new Fee Recap Option for statements called Transaction Rate. This option will print a line item for each separate billing rate by transaction by timekeeper. You can find this option in the Statement Templates program on the **Fee Format** tab.

Shared Rate Tables Now Inherit Effective Date for New Rates (T3, PM, AP, T3 Remote)
- When a Fee or Cost Rate Table is defined in Tabs3, the **Effective Date of New Rate** field will be shared with all dependent clients. Therefore, changes are only required for the effective date on the custom rate table client.
- When viewing a shared rate table, the effective date will be grayed out for all but the host client.
- Rates for fees or costs entered in Tabs3, PracticeMaster, Accounts Payable, and Tabs3 Remote will now be determined using the effective date on shared rate tables.

Tabs3 and PracticeMaster Changes

Renumber Client
- Significantly reduced the time it takes to renumber clients in Tabs3 and PracticeMaster when integrating with PracticeMaster.
- **Client Server Version:** Renumber Client is now covered by Transaction Processing, thereby providing auto-recovery ***AND*** the ability to renumber clients while other users are in the software.

Increased Size of Phone Number Extension Fields
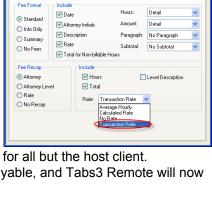- Increased the phone number extension fields to 5 digits.

Duplicate Client ID Control
- If another user adds a new client or matter using the same Client ID at the same time, you will now be given the opportunity to assign a different Client ID.
- Using the New Client ID lookup, you can see which Client IDs are in use.
- If using a Numeric Key Type, the Next Available Client ID will be pre-entered as follows:
  - If adding a new base client (e.g., 3.00), the New Client ID displayed will be the next available Client ID (e.g., 4.00).
  - If adding a new matter using Numeric or Mixed Key Type, (e.g., 4.08 or Ann4.08), the New Client ID displayed will be the next available matter (e.g., 4.09 or Ann4.09).
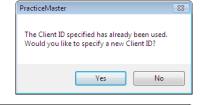
New Field Conflict Resolution
- Added field conflict resolution. When two users edit the same record, a field conflict window will be displayed when the second user saves the record, thus allowing the second user to specify which field changes should be saved.
- Available in all PracticeMaster Editor windows and the Tabs3 Client, Fee, Cost, Payment, and Client Funds data entry windows.
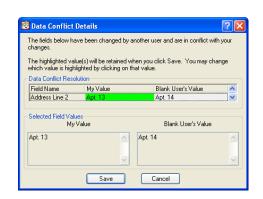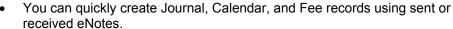
Expanded Task Code Format for Taskbill

- Task Codes and Activity Codes can now have five characters consisting of two alpha characters and three numeric characters (e.g., PA100). Previously only four characters were allowed (e.g., L200).
- Task Code Sets can now have two alpha characters instead of one alpha character, thereby allowing over 600 different sets.
- Fee and Cost data entry now allows new five-character task codes.

PracticeMaster Changes

New eNote Feature

- Added a new *eNote* intra-office messaging system for Client Server Version PracticeMaster Premier users. eNotes blend the best features of e-mail and instant messaging to provide a remarkably easy to use tool that streamlines communications, facilitates workflow between users, retains records for accountability purposes, and enhances your firm's current case management procedures.
- A powerful *eNotify* feature lets you include a link from *any PracticeMaster record* to an eNote. For example, let's say you add a new client and you want to notify the attorney. While in the clie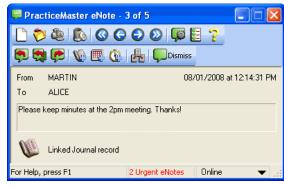nt record, click the eNotify icon to begin a new eNote, which will automatically include a link to the client record. When the attorney receives the eNote, clicking the link will instantly display the record.
- You can quickly create Journal, Calendar, and Fee records using sent or received eNotes.
- eNote provides an easy way to notify users of administrative requests, such as asking users to log out for exclusive functions.
- eNote provides an audit trail of electronic communications that need to be tracked for case management and workflow purposes in a powerful eNote List window.
- eNotes do not replace e-mail; however, they are great for when you can't wait for someone to notice your e-mail.
- eNotes can be kept or dismissed in an easy to use eNote window.
- Hyperlinks are automatically inserted when specifying Web sites, file names, and e-mail addresses in eNotes.
- A Preferences window enables each user to configure individual preferences for eNotes.
- An eNote icon is shown in the System tray providing easily accessed options for sending an eNote, viewing an eNote, and changing your status.
- Three status options enable you to notify others that you are: Online, Away, or Busy (Do Not Disturb).
- Added Access Profile rights for enabling, sending, replying, and more!
- The eNote List shows all eNotes for your User ID and can be filtered according to All, Unread, Received, or Sent.
- For immediate notification, mark an eNote as urgent to display it on top of the recipient's current work.
- Managers can review all eNotes.

Multiple User/Group Lookup Window

- Up to 100 users and groups can be assigned to a single calendar entry (previously there was a limit of 6).
- Added an **All Users** check box allowing you to easily select all users.
- Added a **Group Members** column that displays the users in a group.
- Added incremental search capabilities; typing one or more characters will highlight the next record matching the characters entered.
- The size and position of the window are now saved for subsequent sessions.

Outlook Calendar Integration Now Includes Location Field

- The PracticeMaster **Location** field in the Calendar file is now available to integrate with the Outlook **Location** field.

New "Mark Complete" Button for PracticeMaster Active Alarms

- Added a new **Mark Complete** button to the popup alarm window for calendar tasks.
- The **Mark Complete** button provides the ability to clear the alarm **and** automatically populate the **Date Completed** field with the current system date, thereby removing it from the Task List.

New Mark as Completed Menu Option for Tasks

- Added a new **Mark as Completed** menu option to the **Action** menu for calendar tasks on the Quick Clicks pane, the menu bar, and the right-click menu.

Increased Limits

- Increased the maximum number of fields allowed in a data entry file from 300 fields to 350 fields.
- Increased the History Tracking File size limit from 999 megabytes to 2000 megabytes.
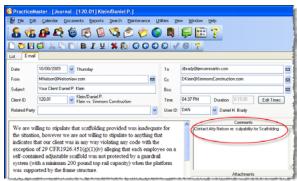- Increased the size of the e-mail address field that is used to prefill e-mail addresses for client and related party fields from 31 characters to 50 characters when creating a journal record from an e-mail that was sent to you using PracticeMaster E-Mail.

Conflict of Interest

- Added the ability to print a criteria page that lists the options specified for Conflict of Interest Searches.

E-mail Preferences

- Added an option in E-mail Preferences to open Journal Records created from E-mail directly to a detailed view, thus providing immediate access to the Comments field.

System Configuration Changes

User Configuration

- Added a new Confirm Password field.
- Passwords are now masked in all areas of the software and cannot be seen.

User List

- Passwords can no longer be included on the User List.

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