

## What's New List for Version 16 of Tabs3, PracticeMaster, and Tabs3 Financial Software

### All Software Version 16 Highlights

#### ***E-mail Batches of Statements (Tabs3)***

- Deliver PDF statements to your clients' inbox with personalized messages based on client information in Tabs3.
- Send one or hundreds per batch and save time, paper, and postage.
- Decide which clients will receive statements by e-mail, mail, or both.
- PDF statements can be password protected for extra security.
- Before e-mails are sent, you can preview them and make any last-minute edits.

#### ***Matter Manager (PracticeMaster)***

- Organize matter information in one simple layout, so you can quickly find what you need.
- Contact information for everyone involved in the case.
- A list of all activity, including documents, e-mails, notes, and appointments.
- See which items have been converted to fees and easily convert those that haven't.
- Open a billing summary to find the current balance, last statement date, trust account balances, and more.
- Customize the toolbar for quick access to features like a calendar for the matter and document assembly.

#### ***WorkFlows (PracticeMaster Premier)***

- Make sure office procedures are always followed.
- WorkFlows start tasks automatically after you perform a particular action.
- For example, when you save a new client you can have PracticeMaster automatically generate a thank you letter, open a pre-filled follow-up appointment, and create an e-mail to your billing clerk.
- Actions include creating records, changing existing records, starting e-mails, starting or sending documents, displaying messages, running reports, launching other PracticeMaster tasks or launching other programs.

#### ***Contact Management (PracticeMaster, Tabs3 Billing, and Trust Accounting)***

- One contact list for your clients, prospective clients, related parties and colleagues.
- Journal e-mails and save documents for any contact or client in PracticeMaster.
- Synchronize all contacts, including clients, to Outlook so that they will synchronize with your smartphone.

#### ***Client Inactivity Report (Tabs3)***

- Identify clients and matters with no activity over a period of time.
- Keep cases from falling through the cracks and identify cases that should be inactivated.

#### ***Two-Way Outlook Synchronization (PracticeMaster)***

- Automatic two way synchronization between PracticeMaster and Outlook.
- Works in both Exchange and non-Exchange environments.

#### ***New Invoice /Check Entry Form (Accounts Payable)***

- Check form looks like a check.
- Rapid entry mode.
- Quick Print button.

#### ***Platinum, formerly Client Server Version***

- Safely log off users so that you can easily do maintenance work such as installing updates.
- Accelerated filtering and column sorting.

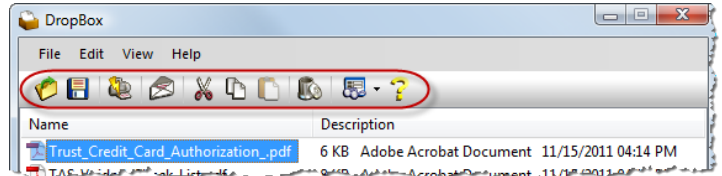
#### ***Platinum SQL***

- A 64-bit optional upgrade to Platinum.

## All Software

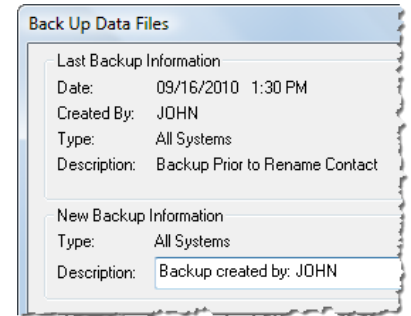
### Improved DropBox

- Added a toolbar to the DropBox window for commonly used tasks such as saving, printing, and attaching files to e-mail messages.
- Added a menu bar to the DropBox window to aid in the use of common tasks.
- Added the ability to easily send a document in an e-mail from the DropBox window via the menu bar, right-click menu, or toolbar button.



### Improved Back Up & Restore Program

- Faster backup times for PracticeMaster firms that journal e-mail attachments.
- Improved the backup program to maintain all backups in a single, easy-to-use list.
- Backups have been optimized for firms with large attachment files. Firms who previously reached the 2 Gb file size limitation may now be able to use this program again.
- Added the ability to maintain three backups instead of two; also added the ability to keep three backups for each GLS client.
- Added the ability to select which of the three backups you want to restore from via the Restore Date Files window.
- Added information for each new backup to the Back Up Data Files window, including a Description field, that makes it easier to know at what point the backup was made.
- Updated the backup file naming convention to make it easier to understand.



### Improved Sorting in Lookup Windows

- A progress meter is displayed when sorting records.
- You now have the ability to cancel a sorting request.

## System Configuration Changes

### New Outgoing E-mail Configuration

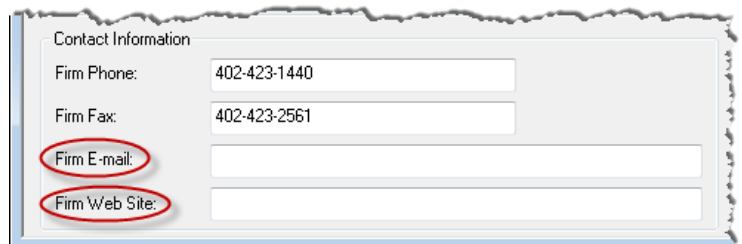
- Consolidated the configuration for outgoing SMTP e-mail in System Configuration, which is used for Tabs3 E-mail Statements and HotBackup notifications.
- Added the ability to send a test e-mail to confirm outgoing e-mail is working.

### Improved Exchange Integration

- Simplified the Microsoft Exchange integration setup procedure by utilizing the Exchange connection with Microsoft Outlook for the local workstation. This allows users to begin utilizing Exchange without having to map user names between System Configuration and Exchange.
- Added improved communication with Microsoft Exchange. This integration is even more advanced when using PracticeMaster Platinum with the new Exchange Connector.

### New Firm Information Fields

- Added fields for the firm's e-mail address and Web site. These fields can be used in Tabs3 Statement Designer, Tabs3 E-mail Templates, PracticeMaster Document Assembly and PracticeMaster Report Writer.



### New User Configuration Fields

- Added fields for each user's phone and fax telephone number.
- Added a new **Disable autofill for all lookup fields** option.

## Tabs3 Changes

### New Contact File

- Clients are now also stored as contacts in the Contact file. This unified Contact file is used by Tabs3, PracticeMaster, and Tabs3 Trust Accounting Software (TAS).
- Add anyone you want to the Contact file; a contact does not need to be a client.
- Contacts can be designated as Individual or Organization contacts, thus allowing you to associate multiple contacts with a single Organization.
- You can maintain multiple addresses (Business/Home/Other), three e-mail addresses and up to 19 phone numbers for each contact. Designate which address is the default.
- Enter the billing address in a block format or use the Details window to enter or view individual fields within the address.
- You will be notified when changing an address or e-mail address that affects a billing statement.
- Changing an Organization's business information will prompt you to select which associated contacts you want to change.
- Contacts can be marked as inactive.
- Contact and billing information for secure clients is stored in the Client file, thereby preserving client security.
- New e-mail button in client and contact file allows you to start a new e-mail using your default e-mail software.
- Rename Contact utility is used to rename contacts.
- Added the ability to archive a matter's address when it is marked as inactive so it is not changed when the address changes for other client matters.

The screenshot shows the 'Contact Information' window for 'Takiti/James'. It includes fields for Contact ID, Full Name, Organization, and various addresses and phone numbers. An 'Address Details' sub-window is open, showing a detailed view of the business address: '3 Building Center, Suite 2100, 201 E 48th Street, Manhattan NY 10017-1538'.

### New Client Record window

- Added a New Client Record window that lets you easily specify the next available Client ID, next available Matter Number, or a specific Client ID when adding a new client.

The screenshot shows the 'New Client Record' window. It has three radio button options: 'Next Available Client ID' (selected), 'Next Available Matter', and 'Specific Client ID'. Each option has a corresponding text field with values 853.00, 852.01, and 852.00 respectively. There are 'OK' and 'Cancel' buttons, and a checkbox for 'Do Not Show Again'.

### New E-mailing Statements Capabilities

- New e-mailing statements feature streamlines creating, reviewing, and sending of billing statements.
- Configure clients to receive statements by e-mail, mail or both.
- Automatically generate e-mail messages with attached PDF statements when running your batch final statements.
- Preview and/or edit the individual e-mails before they are sent.
- Optionally password protect PDF statements e-mailed to clients for security purposes.
- Send e-mail statements via Microsoft Outlook or an SMTP server.

## New E-mail Templates

- Standardize or customize the subject and body of the e-mails using E-mail Templates.
- Define unlimited E-mail Templates for customizing the e-mails that will accompany the attached PDF statements.
- Designate which e-mail template will be the default e-mail template for new clients.
- Choose from over 100 variables for creating the Subject line and Body for the e-mail message, such as Statement Date, Balance Due, Client Work Description, Firm Information fields, etc.
- Include any of the 50 custom fields defined for each client in the Subject line and Body of the e-mail message.
- Specify the From Name, From Address, Reply To address, Cc Recipients and Bcc Recipients.
- Use the Bcc Recipient to retain a copy of the e-mail using your firm's e-mail address.

## New E-Mail Statements Window

- The E-Mail Statements window consists of a table with all unsent e-mail statements.

Client ID	Client Name	Work Description	Contact	E-mail Address	PDF File Name	Timekeeper	H	R	Statement Date	Statement Status
200.01	Peterson Insurance Co	General Legal Couns	Paul Franklin	pfranklin@petersoninsuranc	200_Stmt_7592.pdf	1-MLJ			09/21/2010	Updated
415.00	MegaConstruction Co	Corporate Merger - M	James Takiti	jt@MegaConCorp.com	415.00_Stmt_7597.pdf	2-PAM			09/21/2010	To Be Updated
850.00	White/Kelly	Divorce	Kelly White	kwhite2000@yahoo.com	850_Stmt_7595.pdf	2-PAM			09/21/2010	Updated

Options Refresh Hold Reviewed View/Edit E-mail Send Reviewed

- This window shows Client ID, Name, Work Description, Contact, E-mail Address, PDF File Name, Primary Timekeeper, Hold status, Reviewed status, Statement Date, and Statement Status (i.e., Updated or To Be Updated).
- The **View/Edit E-mail** button opens the E-mail Preview window allowing you to view and edit the e-mail message.
- Double-click the PDF File Name to open the PDF statement.
- Mark the statement as "on hold" or "reviewed" in this window or the E-mail Preview window.
- The **Options** button lets you filter the statements shown in the window by Timekeeper, Client, and/or Statement Date.
- The **Send Reviewed** button is used to send the e-mail messages.

### New E-mail Preview Window

- Preview the e-mail message and statement attachment before marking the e-mail as reviewed.
- Optionally edit the e-mail message. The formatting toolbar lets you easily change the formatting and spell check the message.
- View additional recipients, subject, and message. Displays the e-mail message with the variable information in place of the template variables.
- Optionally use the Insert File option to attach additional images or documents to e-mails in the Attachments pane.
- Preview toolbar includes **Send**, **Hold**, and **Reviewed** buttons that let you mark the status of the e-mail. Use the **Next** and **Previous** buttons to easily view the next e-mail message.

### New Bill To Record File

- The Bill To Record file includes billing information not stored in the Contact file.
  - Designate whether the statement will be mailed, e-mailed or both.
  - Designate which address will be printed on the statement.
  - Designate whether an Attention line will be printed on the statement. You no longer need to use an asterisk in front of a contact to indicate that the contact name will not print on a statement.
  - Designate which e-mail address will be used to e-mail the statement.
  - Designate which E-mail Template will be used to generate the e-mail message.

Bill To Record

Bill To Name: MegaConstruction Corporation

Description: Default Billing Address for this Matter

Statement Delivery Options

☒ Mail Statement

☒ E-mail Statement

☐ Print the Client's Name and Address on the Statement

☐ Print the Bill To's Name and Address on the Statement

Statement Address

Matter: 3 Building Center, Suite 2100  
201 E 48th Street  
Manhattan NY 10017-1538

☒ Include Attention line on statement

☒ Client's Contact Name: James Takiti

☐ Other:

E-mail Delivery Options

E-mail 1\*: jt@MegaConCorp.com

E-mail Template: EXAMPLE Example Template

OK Cancel Delete

### Client Funds Credit Card Integration

- Added the ability to authorize credit card payments for deposits into Client Funds accounts.
- Tabs3 works with TSYS Merchant Solutions<sup>SM</sup> (formerly First National Merchant Solutions®) to provide merchant accounts for Tabs3 and Tabs3 Trust Accounting Software. **The TSYS Merchant Solutions<sup>SM</sup> account will work with your existing bank account.**
- Save money with low, negotiated processing fees for Tabs3 users.
- The types of credit cards accepted can be defined for each merchant account and include Visa®, MasterCard®, Discover®, American Express®, and Diners Club®.
- Tabs3 encrypts and transmits cardholder data to TSYS Merchant Solutions; however, Tabs3 does not store sensitive cardholder information.
- The ability to authorize Credit Card transactions is provided with Tabs3 at no charge, but requires a merchant account with TSYS Merchant Solutions that does require processing fees. For more information visit [www.Tabs3.com/ccf](http://www.Tabs3.com/ccf).



### Improved Client Funds Transaction Entry

- Client Funds can now apply to previous balances.
- Improved Client Funds entry allows linked payment transactions to be created at the time of entry, or when a statement is generated. Linked payments allow for customized allocation and descriptions to be included, apart from the Client Funds transaction that created it.
- Improved withdrawal options allow more flexibility with how to handle the withdrawal amount in Tabs3, or when writing checks. This flexibility is also extended to refund amounts created from payment adjustments.

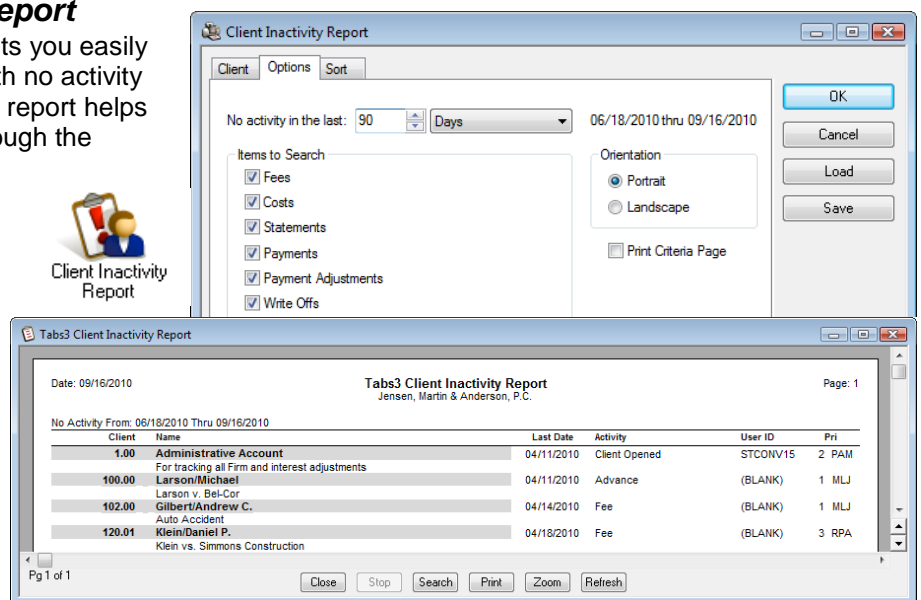


## Client Funds Now Supports GLS Integration

- Added the ability to integrate Client Funds transactions with Tabs3 General Ledger Software (GLS).
- Similar to payment and cost transaction integration, Tabs3 can be configured to post journal entries for Client Funds to a single set of debit and credit accounts, or based on the following:
  - By Timekeeper
  - By Location
  - By Category
- Additionally, GLS posting can be based on two levels, if desired. For example, Tabs3 can optionally be configured to post journal entries for Client Funds:
  - By Timekeeper & Location
  - By Category & Location
  - By Category & Timekeeper
- Payments to the firm from Client Funds can create linked payment transactions, which may not be distributed until a statement is generated. Therefore, the new integration requires that an account for Unapplied Payments be defined in GLS.
- Accrual balances for Client Funds transactions can still be integrated as well.

## New Tabs3 Client Inactivity Report

- New Client Inactivity Report lets you easily identify clients and matters 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.
- Specify which items you want to search, including fees, costs, statements, payments, payment adjustments, write offs, and client funds.



## Improved Support Log

- Added tracking for the following tasks: Write Off Client, Reverse Write Off, Payment Adjustment, and Transfer Transactions. Interruptions to these tasks will be indicated with an asterisk.

## Improved Payment Adjustments

- Added a new Payment Adjustment Options window that is used to determine what will be done with the payment after it has been adjusted.
- Added the ability to automatically create a new payment record for another client during the adjustment.
- Added the ability to automatically deposit the adjustment amount into Client Funds for another client.

## Statement Designer

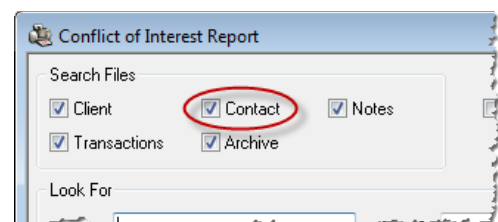
- Added the ability to include variables in Statement Designer page layouts for the firm's e-mail address and Web site, as well as the location field from the Client file.

## Cover Statements

- Cover statements now print before statements when combining matters.

## Conflict of Interest

- Added the ability to include or exclude the Contact file.

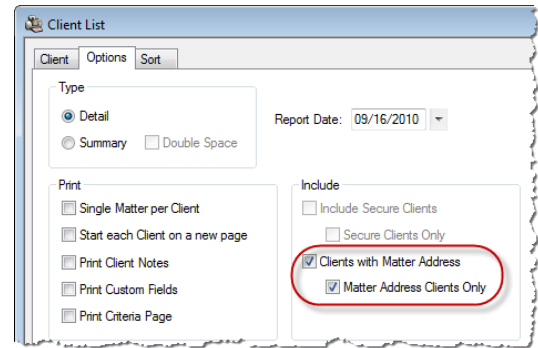


## Client List

- Added the ability to print a list of only clients with a Matter Address.

## Improved Report Options

- When specifying which clients to include on reports, you can now include or exclude clients without a Close Date. Previously you could only specify a range of Close Dates.
- When specifying which clients to include on reports, you can specify whether you want to include clients who receive e-mail statements, mail statements or both.



## Timekeeper Profitability Report

- Added a separate access right for this report so you no longer have to be a manager to run this report.

## Client Manager

- Added links to client and matter contact records. Now shows the default e-mail address and four default phone numbers.

## New Outlook Sync Billing Changes Log

- Print or view a report of changes made to contacts in Tabs3 as a result of synchronizations between PracticeMaster and Outlook. You can run the report for a specific contact, date range, or user.

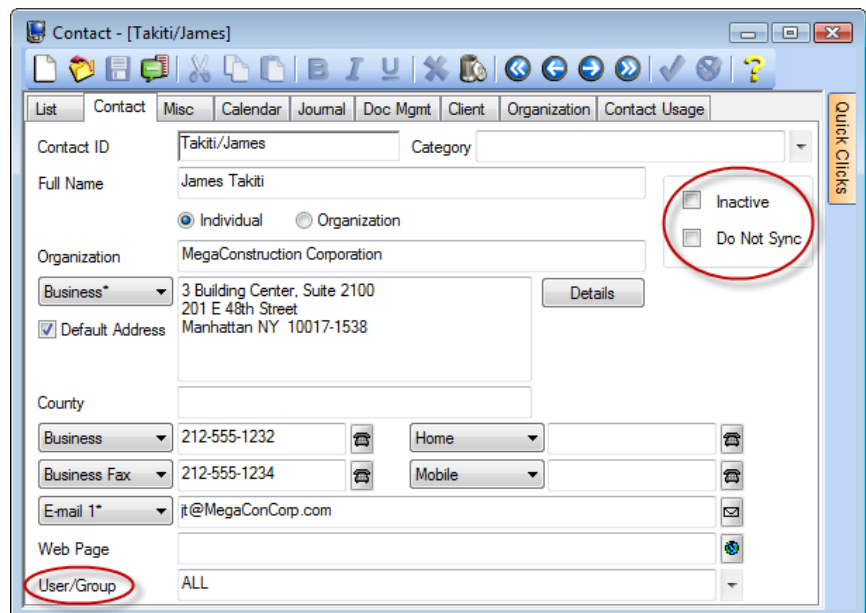
## Task Folder Modification

- Added a new Task Folder icon for Client Setup Reports. The **Reports / Client** selection on the Tabs3 menu bar did not change.
- Moved the following reports from Client Reports to Client Setup Reports: Client Rate Report, Split Fee Report, Fee Compensation Rules Report, Task Code Budget Report, and Client Budget Report.

# PracticeMaster Changes

## Contact Management – New Contact File

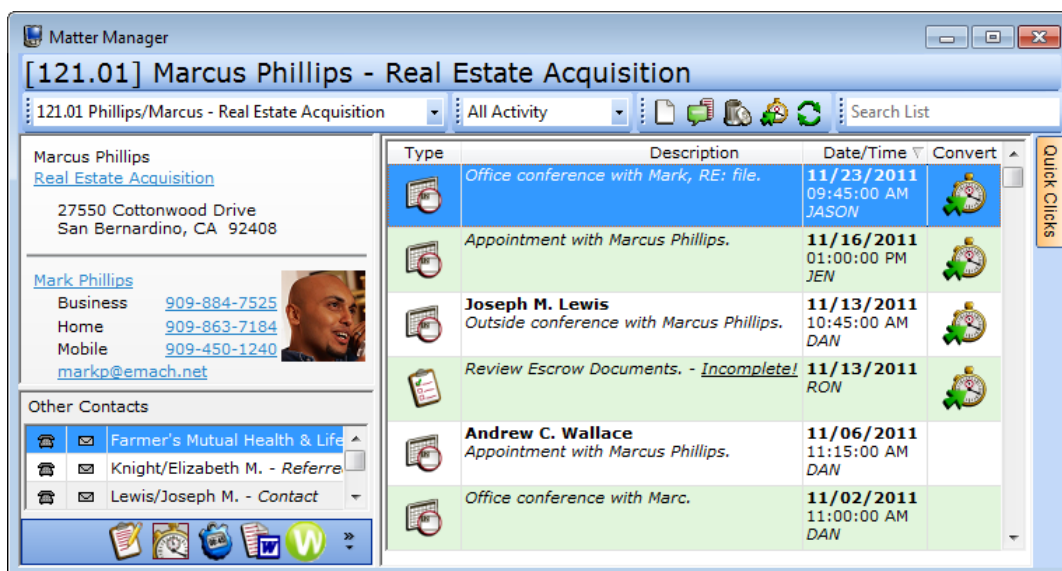
- Related Parties in PracticeMaster are now called Contacts.
- Increased the number of categories associated with a contact from 8 to 20.
- Created additional pages in the Contact file and the ability to configure which pages you want shown, including the Document Management Page, Associated Client Page, Calendar Page, Combined Journal Page, Client Notes Only Page, E-mail Only Page, Phone Only Page, Timer Only Page, and Research Only Journal Page. Click a page to show all records for the selected contact.
- Clients are now also stored as contacts in the Contact file. This unified Contact file is used by Tabs3, PracticeMaster, and Tabs3 Trust Accounting Software (TAS).



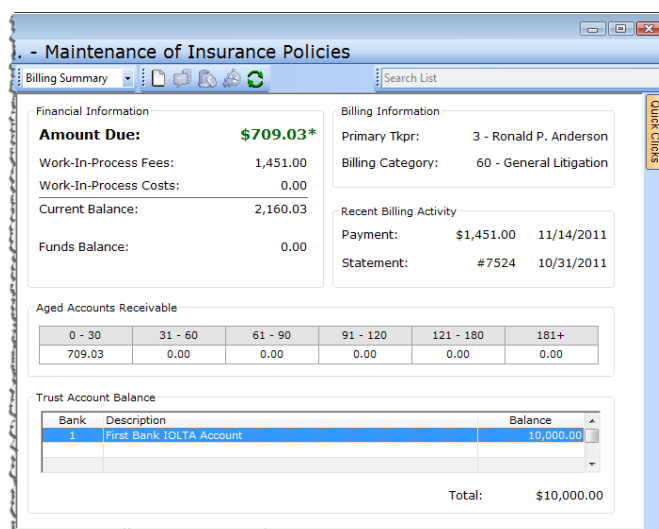
- Clients can now synchronize to Outlook since they are stored as contacts. Secure clients do not synchronize to Outlook.
- Contacts can be designated as Individual or Organization contacts, thus allowing you to associate multiple contacts with a single Organization.
- You can maintain multiple addresses (Business/Home/Other), three e-mail addresses and up to 19 phone numbers for each contact. Designate which address is the default.
- Changing an Organization's business information will prompt you to select which other associated contacts you want to change.
- Contacts can be marked as inactive for easy filtering.
- Contact information for secure clients is stored in the Client file, thereby preserving client security.
- Contacts can be marked as **Do not sync** to prevent them from synchronizing to Outlook.
- Contacts can be assigned to synchronize to all users or specific users and groups.
- Added **Client** and **Organization** pages to easily view associated clients and contacts associated with the same organization as the selected contact.
- Added Gender and Date of Birth fields.

### New PracticeMaster Matter Manager

- The new PracticeMaster Matter Manager puts all records for a matter at your fingertips.
- Easily see all contacts associated with a matter; e-mail or call any associated contact.
- View a chronological timeline of all case activity using the All Activity List.



- View documents, calendar entries, all journal records, phone and e-mail journal records, fees, costs, contacts, attorneys, as well as Area of Practice records. Use the SnapShot, column layouts, and filters that you are already familiar with.
- Quickly view, add, edit, or delete transactions, convert transactions to fees for billing, and search for specific information.
- View a list of the last twenty matters you worked with for easy matter selection.
- Each user can customize the Matter Manager's taskbar with buttons for launching the most commonly used programs and reports in PracticeMaster.
- View a list of Worldox documents for the matter using the **Worldox** button in the taskbar.





- The Matter Manager retrieves summary billing information from Tabs3 and Tabs3 Trust Accounting (TAS) software including balance due, work-in-process totals, primary timekeeper, billing category, recent activity, accounts receivable, and trust account balances. Restrict access to billing information via Access Profiles as needed.
- The PracticeMaster Matter Manager replaces the Client Manager. Use the /MANAGER startup option to automatically open the Matter Manager when PracticeMaster is launched.

### **Powerful New WorkFlows Feature (PracticeMaster Premier)**

- New WorkFlows feature starts tasks automatically after a user performs a particular event (such as adding a record, changing a record, deleting a record, changing a specific field in a file, changing a specific field to a specific value, and more).
- Include up to 10 actions on each WorkFlow that will occur as a result, such as creating records, changing existing records, processing calendar plan templates, assembling documents, starting e-mails, sending or starting eNotes, displaying messages, running reports, launching other PracticeMaster tasks, or launching external applications.
- WorkFlows can be designated as User Activated, allowing them to be run on demand via the Quick Clicks pane. You can even run a WorkFlow for multiple records at the same time.
- WorkFlows can be configured such that the user is asked to confirm whether or not to run the WorkFlow.
- WorkFlow initiated additions or changes to a record can be configured to save automatically or require user confirmation, thus providing a wide range of flexibility. Requiring confirmation provides the user the ability to disregard or modify the record as needed.
- Added powerful controls for choosing when WorkFlows run, including record filtering and specific field selections.
- Optionally use powerful expressions to calculate fields when adding and changing records.
- Optionally send eNotes automatically (*PracticeMaster Platinum feature only*).
- WorkFlows can be as simple or as complex as necessary. For example, when a new client is saved, your WorkFlow can automatically do any or all of the following: generate a thank you letter, print a file label, send an e-mail to the primary timekeeper, run a Conflict of Interest check, execute a Calendar Plan Template for all follow up tasks and events, create a calendar record, and/or display a message reminding the user who added the client to run a Conflict of Interest Report.



### **New Two-Way Outlook Synchronization**

- New Automatic Two-way Synchronization between PracticeMaster and Outlook.
- Synchronization works in both an Exchange and non-Exchange environment.

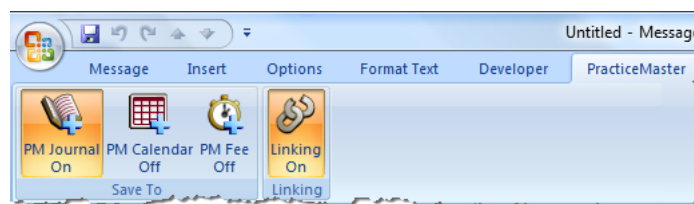
### **Enhanced Outlook Synchronization Features**

- New Configuration Options offer greater control of synchronization.
- Ability to schedule periodic synchronization to ensure everyone is up-to-date.
- Clients can now synchronize to Outlook since they are stored as contacts. Secure clients are not synchronized.
- New "Exchange Connector" reduces network traffic and allows synchronization with Outlook even when a user is not logged into PracticeMaster (*PracticeMaster Platinum feature only*).
- When synchronizing billing addresses from Outlook to Tabs3, a warning will be displayed indicating the change affects where a statement is sent and is logged in the sync log.
- Contacts can be marked as **Do not sync** to prevent them from synchronizing to Outlook. They can also be assigned to synchronize to all users or specific users and groups.

- New Outlook Sync Log provides historical information and lets you view detailed changes for a specific contact, date range, or user. You can also see records for your most recent synchronization or only records that affect Tabs3 billing.

### **Improved Outlook Plug-in**

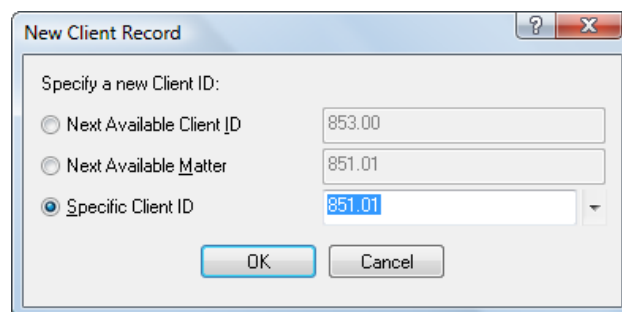
- PM Journal buttons are now on the Outlook ribbon, making them easier to find.
- The entire e-mail message is included in the Journal File, regardless of length. Previously the message truncated at 2048 characters.
- Attachments are now included when forwarding an e-mail journal record.
- PracticeMaster E-mail has been replaced with the PracticeMaster toolbar in Outlook (Outlook Plug-In). Enhancements to the PracticeMaster toolbar in Outlook, as well as enhancements to the overall integration between PracticeMaster and Outlook, eliminate the need to provide and maintain this option.



### **New Client Record window**

#### **New Create Client Option in Quick Clicks**

- Added a **New Client Record** window that lets you easily specify the next available Client ID, next available Matter Number, or a specific Client ID when adding a new client.
- Added a new **Create Client** Quick Clicks menu option in the Contact file that opens a window letting you specify the next available Client ID, next available Matter Number, or a specific Client ID, thus allowing you to easily make a contact a client.



### **New Change Client ID in Quick Clicks**

- Added a new **Change Client ID** Quick Clicks menu option that lets you easily change the Client ID for one or more client associated records in most files including document management, journal, calendar, and area of practice records.

### **PracticeMaster Calendar**

- The default group of All Users now excludes inactive users.
- Auto E-mail Notification now includes the day in the default text whenever a date is shown.

### **PracticeMaster Report Writer**

- Added the ability to include variables in reports for the firm's e-mail address and Web site.

### **Word Document Assembly**

- Added the ability to include variables in document templates for the firm's e-mail address and Web site.

### **HotDocs Document Assembly**

- Added the ability to include variables in document templates for the firm's e-mail address and Web site.
- Added the ability to map virtual fields to HotDocs variables.

### **New Merge Contacts Utility**

- Added the ability to merge two contact records into a single record, making it easier to deal with duplicate contacts.

### **Document Management File**

- Added a protected field for Contact.
- Added the ability to reassign a document management record to a different Client ID.

## Journal File

- Added a phone field to Phone journal records recording the phone number called or received.

## Increased Limits

- Increased the maximum number of fields allowed in a data entry file from 350 fields to 410 fields to accommodate new fields in the Client file.
- Increased the number of indexes allowed for all files to a maximum of 15.
- Increased the History Tracking File size limit from 2,000 megabytes to 99,999 megabytes.

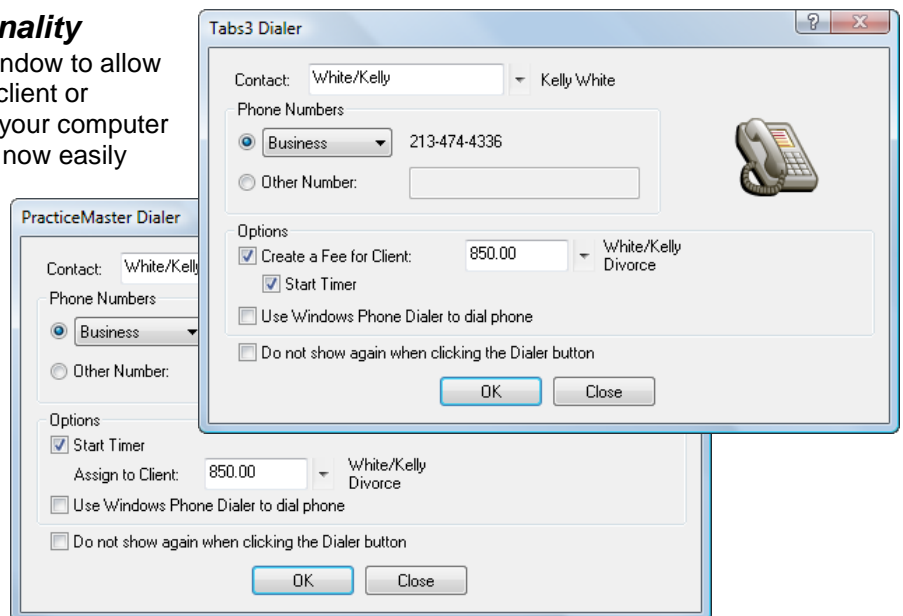
## Tabs3 & PracticeMaster Changes

### SMTP Configuration

- Moved configuration settings for sending e-mail from PracticeMaster to System Configuration, thereby allowing consolidation of settings to be used by other programs, including Tabs3 E-mail Statements.

### Phone Dialer Improved Functionality

- Redesigned the Phone Dialer window to allow for more options when calling a client or contact, whether or not you use your computer to dial phone numbers. You can now easily start a task when you dial the phone, while keeping the contact information onscreen.
- Support for built-in extension fields in all phone numbers.
- Added the ability to configure this feature even when a modem is not used with the dialer. This lets all firms use the dialer to automatically start a timer, fee entry, and/or phone call journal record, even those firms that do not use integrated telephone software.
- Added the ability to configure the Dialer window such that the window is not shown after clicking the phone dialer icon, thus streamlining workflow. Easily change configuration by using the Dial Phone menu option.



## Platinum Versions

### New Platinum SQL Server

- We now offer two Platinum Servers:
  - the **Platinum SQL Server**, our new 64-bit SQL server; and
  - the **Platinum Server**, our current 32-bit server.

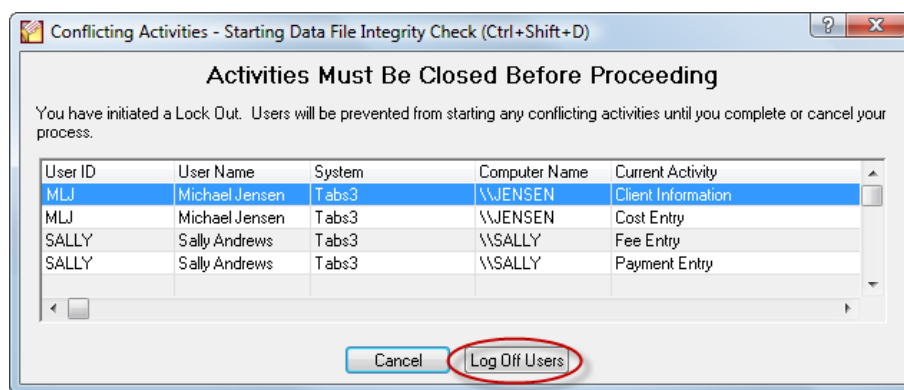
### New Names – CSV is now Platinum

- Tabs3 Platinum and PracticeMaster Platinum are the new names for Tabs3 Client Server Version and PracticeMaster Client Server Version.
- Platinum Server is the new name for the STI Server.

### New Log Off Users

- Added the ability to safely log off users from the Tabs3 & PracticeMaster software automatically when needed, thus making it easier to perform system maintenance tasks.
- Alert users by specifying the reason and number of minutes before the log off will occur.

- All log offs are written to the Support Log.
- Added a new Log Off Users access right to the Access Profile, allowing you to designate which users have this right.
- Users are automatically logged off when using the Reset Users option, preventing incorrect resetting of active users. This will help prevent errors caused by resetting users who are active in the software.



### **Improved Filtering**

- Implemented server-side filtering, thereby providing **dramatically** faster filtering in PracticeMaster.
- No user interface makes it transparent to the user.

### **New Exchange Connector**

- PracticeMaster and Outlook stay synchronized, even when PracticeMaster is not open on your workstation.
- Only one “administrative” Exchange user needs access rights to other users, thus eliminating the need to assign Editor rights to all users.
- Periodic synchronization occurs at the server, thereby reducing network traffic.
- The Exchange Connector performs a single periodic synchronization for all users, ensuring that everyone is up-to-date.
- Access rights to users’ Exchange folders are automatically assigned to the “administrative” user as they log into PracticeMaster
- Only requires that PracticeMaster be running on one computer in the office for synchronization to occur for all users.

### **eNote**

- Added the ability to undo the last eNote you dismissed from the eNote window.

### **Merge Tabs3 Remote Data**

- Significantly improved the time it takes to merge Tabs3 Remote data transactions into Tabs3.

## **Tabs3 Accounts Payable Software (APS)**

### **New Invoice/Check Entry Form**

- Simplified data entry of invoices and manual checks to look like a check form.
- Added a new rapid data entry mode that toggles between Detail and Rapid mode. The Rapid mode hides the Additional Information fields including Due Date, Discount Amount, Save/Purge, Voucher #, Discount Date, Hold/Pay, Amount to Pay, Net Amount, User ID, Take Discount, and Date Entered fields. A button on the toolbar can be used to toggle this mode.
- Simplified how miscellaneous vendor information is entered.
- The Quick Print button in the toolbar makes it easy to print a manual check at time of entry.
- Optimized the performance of the “Check for Duplicate Invoices” feature.

### **Enhanced Vendor Capabilities**

- Added a new Country field.
- Added new address block field that combines all address fields into a single field.

## New 1099 Reporting Capabilities

- Added the ability to designate whether or not an invoice/check will be included in 1099 amounts, thus making it easy to exclude non-1099 amounts for the same vendor when running 1099 information.
- Added the ability to include 1099 invoices, non-1099 invoices or both on the Invoice by Vendor and Invoice by Voucher Reports.

## APS Reports

- Added the ability to include the Country field in the Vendor Labels program.

## Checks

- Added new Memo field for each invoice and the ability to print the memo field on APS checks. This feature requires new Nelco checks (L1572).
- Provided Bank Account configuration options to choose the new check layout when necessary. Allows automatic switching when a specific check # is reached.
- Provided an option in Check Setup to optionally print the Memo line on checks.
- Change the amount fields to print in a smaller font if they are too large for the space available as opposed to printing on the next line.
- Added the ability to print the Country field on checks.

## Tabs3 Trust Accounting Software (TAS)

### New Contact File

- Trust accounts are now also stored as contacts in the Contact file. This unified Contact file is used by Tabs3, PracticeMaster, and Tabs3 Trust Accounting Software (TAS).
- Redesigned the Trust Account entry window to reflect the new Contact file.

## Tabs3 General Ledger Software (GLS)

### Integration with Tabs3 Client Funds

- Integration with Tabs3 Client Funds is now supported. See the *Tabs3 Changes* section above for more information.

### Updated Renumber Account Program

- When renumbering an account, GLS will now automatically update references to the GLS account in Tabs3, Tabs3 Accounts Payable Software (APS), and Tabs3 Trust Accounting Software (TAS) integration settings. (Note: GLS report definitions and GLS Report Writer Reports that use the Old Account Number are not updated automatically.)

### Improved Journal Entry Session Totals

- The Journal Entry program now keeps a running total of all new journal entries, changes, and deletions during the current data entry session. Previously, changes and deletions to journal entries that were added in previous sessions were not included in the current session totals.
- Added a Current Session filter to the Journal Entry List View.



## **New Integration Support**

### ***64-bit Outlook 2010***

### ***64-bit Office 2010***

- Version 16 integrates with the 64-bit versions of Outlook 2010 and Office 2010.

### ***Improved Exchange Integration***

- Added improved communication with Microsoft Exchange. This integration is advanced even more when using PracticeMaster Platinum with the Exchange Connector.

## **Updated Terminology in All Programs**

### ***Terminology Changes***

- Related Parties are now called Contacts.
- Multimedia Tutorials are now called Training Videos.
- Client Server Version (CSV) software is now called Platinum Version software.
- PracticeMaster Client Notes journal records are now called Note journal records.
- Key Length in APS and Account # Format in GLS are now called Decimal Places.

## **Sunset Information**

### ***PracticeMaster Palm Conduits***

- Starting with Version 16, the PracticeMaster Palm Conduits will no longer be included in PracticeMaster. Users still using handheld devices with the discontinued Palm Operating System can take advantage of the improved synchronization between PracticeMaster and Outlook by using Outlook to synchronize to their legacy Palm OS® handheld devices.

### ***PracticeMaster E-mail***

- Starting with Version 16, the PracticeMaster E-mail program will no longer be included within PracticeMaster. The Tabs3 and PracticeMaster programs are designed to work alongside your existing e-mail client. The Outlook toolbar plug-in and additional column display provides all of the functionality previously found in the PracticeMaster E-mail program.

### ***Windows 2000***

- Starting with Version 16, Tabs3 and PracticeMaster software will no longer be supported on Windows 2000 operating systems.

### ***GroupWise***

- Starting with Version 16, PracticeMaster calendar and e-mail integration with Novell GroupWise will no longer be supported.

### ***Novell***

- Starting with Version 16, Tabs3 and PracticeMaster software will no longer be tested on Novell networks. Novell users will, however, receive a basic level of support from our Technical Support department. This support can include guidance on how the software works, and how to use Tabs3 and PracticeMaster software. This limited support for Novell users will not include troubleshooting issues that may have been caused by Novell networks.
- The Client Server Version (Platinum Server) is no longer available for the Novell NetWare platform.