Tabs3

Reliable Software. Trusted Service.

by profitsolv

Clients and Contacts Guide

Tabs3 Billing

PracticeMaster

Trust Accounting

Accounts Payable

General Ledger

TABS3.COM

Tabs3 Software Clients & Contacts Guide

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Purpose of Guide

The purpose of this Guide is to familiarize you with contacts and clients and how they work together in Tabs3 Software.

Key Concepts

Although contacts, clients, payees, vendors, and users are closely related, they are not the same. The contacts in the Contact file consist of a list of individuals and businesses. It is possible that a contact will never be a client (or a payee, vendor, or user).

Clients, payees, vendors, and users are contacts who have specific roles. Although their names, addresses, phone numbers, and other information are generally stored as contacts, additional information about them may be accessed in another window, such as the Client Information window in Tabs3 Billing, or the Payee window of Trust. These locations store specific information that is not used by other applications, allowing this information to be protected against those without the correct access rights.

What is a contact?

Not every person that interacts with a law firm is a client of that firm. From medical professionals to your County Clerk, law firms deal with many contacts. A contact is anyone that the law firm works with and retains contact information for. Recording this information in Tabs3 Software makes it easy for users to find phone numbers, addresses, email addresses, and more, without having to search for a physical file. Contact information also optionally synchronizes to Outlook, which can then be synchronized to a smartphone or other device.

Clients, payees, vendors, and users are linked to contacts. This means that changes to a name, address, phone number, and email address are done via the Contact Information window rather than the Client Information, Payee, Vendor Information, and User Configuration windows. Editing the contact saves time when updating information for multiple matters, or when the same contact is used as a payee and a vendor. Updating a contact updates linked client, payee, vendor, and user records; therefore, a contact linked to twenty different matters must only be updated once for the change to take effect across all twenty client matters.

Contacts can easily be converted to other record types, such as a client. This allows you to enter prospective clients and convert them to client records when the time is right to do so.

What is a client?

Clients are the backbone of any law firm. Firms earn money by rendering services to clients and being paid for those services. A firm may represent individuals, businesses, or a combination of both in one or more *matters*, or specific cases. Tabs3 Billing, PracticeMaster, and Trust are versatile applications that help you keep track of your client information, from billing and statement generation to calendar entries, journal records, trust balances, and more!

What is a payee?

Payees are business entities or individuals to whom checks or electronic fund transfers (EFTs) are paid on behalf of your clients. Tabs3 Trust Accounting maintains totals for all checks and EFTs paid to each payee, and allows you to generate IRS Form 1099-MISC and/or 1099-NEC at the end of the year.

What is a vendor?

Vendors are business entities or individuals to whom checks or EFTs are paid by your firm. Tabs3 Accounts Payable maintains totals for all checks and EFTs paid to each vendor, and allows you to generate IRS Form 1099-MISC and/or 1099-NEC at the end of the year.

What is a user?

Users are employees who will be using the Tabs3 Software. Each user can be configured with specific access rights. Access rights control which applications and features users can access. Entities for calendar tracking can also be stored as a user, such as conference rooms and laptops.

Timekeepers are users for whom billable time needs to be tracked.

Contacts

Menu:	***(Tabs3 Billing) File | Data Entry | Contact***
	(PracticeMaster/Trust/AP) File | Open | Contact
Home:	***(Tabs3 Billing) All Actions | People | Contact Information***
	(PracticeMaster) All Actions | People | Contact File
	(Trust) All Actions | Trust Accounts | Contact Information
	(AP) All Actions | Vendor | Contact Information
Quick Launch:	***(Tabs3 Billing/Trust/AP) Contact Information***
	(PracticeMaster) Contact File

Contacts are an integral component of the Tabs3 Software. A contact is any individual or organization that does business with the firm, on behalf of a client or otherwise.

▸ To add a contact in Tabs3 Billing, Trust, or AP

1. In the Quick Launch, search for and select "Contact Information."
2. Click .
3. In the New Contact window, enter the new Contact ID and click **OK**.
4. Enter the remaining information for the contact record.
5. Click .

▸ To add a contact in PracticeMaster

1. In the Quick Launch, search for and select "Contact File."
2. Click .
3. In the New Contact window, enter the new Contact ID and click **OK**.
4. Enter the remaining information for the contact record.
5. Click .

▸ To add a contact in System Configuration

1. From the menu, select ***File* | *Open* | *Users***.
2. Click .
3. Specify a **User ID** and **Password** for the user.

4. Enter the **User Name** in Last/First format and press the *Tab* key.
   a. In the Contact Information window, enter the contact information for the user.
   b. Click to save the new contact. You will be returned to the User Configuration window.

The Contact Information window is very similar throughout the Tabs3 Software. Most fields in the Contact file are self explanatory. However, some fields have certain requirements, which are explained below.

Note: Unlike clients, contacts are not secure. If keeping contact information secure is a concern, we recommend creating a Secure Client *(page 16)* instead.

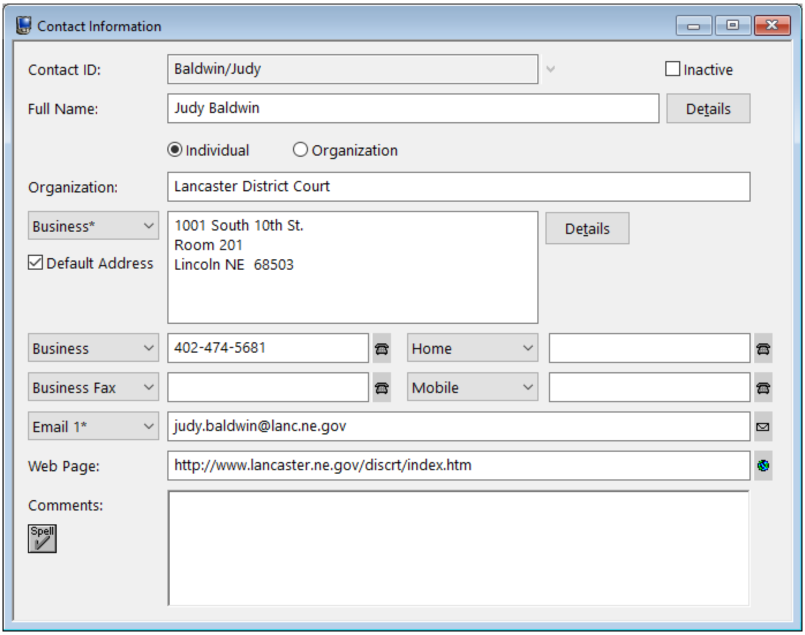


Figure 1, Contact Information window

Contact ID

The first field of the Contact Information window is the **Contact ID** field. A **Contact ID** is a unique identifier that distinguishes different contacts from one another. In Figure 1, the **Contact ID** is Baldwin/Judy. Because the **Contact ID** field must always be unique, you cannot enter another **Contact ID** of Baldwin/Judy.

Contact names will display differently based on the presence of a forward slash character. **Contact IDs** with a forward slash are treated as being in Last Name/First Name order, while **Contact IDs** with no slash are as is.

More Info: For more information on Contact ID formatting, refer to the Help.

Inactive

The **Inactive** check box is used to distinguish between active and inactive contacts. Marking contacts inactive allows you to use optional filters to reduce the number of records displayed on the **List** tab of the Contact file.

Full Name

The **Full Name** field is how the contact's name will be displayed throughout the Tabs3 Software, such as on statements and reports. For individual contacts, additional information can be added by clicking the **Details** button and entering information in separate fields for **First Name**, **Middle Name**, **Last Name**, and **Initials** as shown in Figure 2.

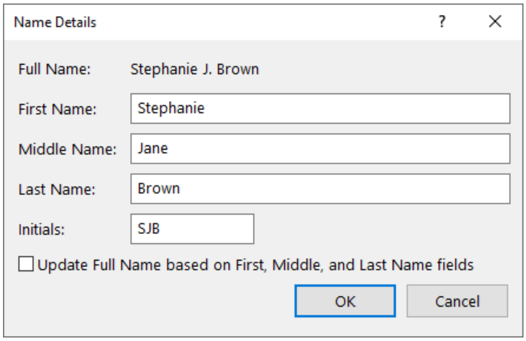


Figure 2, Name Details window

Individuals vs. Organizations

The format of the Contact ID determines whether Tabs3 Software will treat the contact as an individual or an organization. Contact IDs that include a forward slash "/" are marked as individual contacts, whereas Contact IDs without a forward slash are marked as organizational contacts. "Baldwin/Judy" is an example of an individual contact. "Lancaster District Court" is an example of an organizational contact.

The **Organization** field stores the details of an organization associated with an individual contact. The contents of the field vary depending on whether the currently selected contact is an individual or an organization. If an individual contact is selected, the field is optional and remains blank. If an organization contact is selected, the field will contain the same value as the **Contact ID** field and appear dimmed. This is because individuals can be linked to organizations, but organizations cannot be linked to other organizations.

Suppose that a firm is representing Rockwell Insurance Company in a case. The point of contact at Rockwell Insurance is Jeff Turner, an insurance adjuster. You can link Jeff Turner to Rockwell Insurance Company by entering Rockwell Insurance Company in the **Organization** field of Jeff Turner's contact record, as shown.

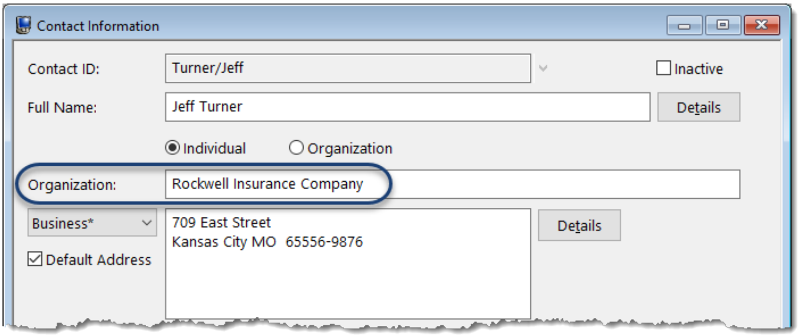


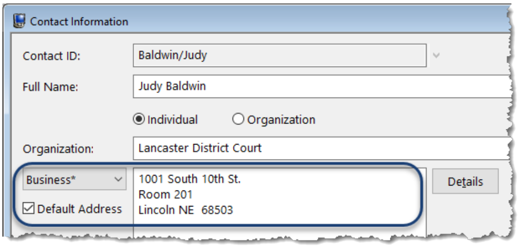
Figure 3, Individual Contact linked to an Organization

Address

The **Address** field allows you to store multiple addresses for a single contact. The default address differs depending on the currently selected contact. Individual contacts default to use a "Home" address, whereas Organization contacts default to use a "Business" address. An "Other" address option is available as well. The default can be changed by selecting another option and selecting the **Default Address** check box.

Address information can be added directly to the **Address** block or by clicking the **Details** button and entering information in individual fields for **Address Lines 1-3**, **City**, **State**, and **Country** as shown in Figure 4 and Figure 5.

More Info: For more information regarding Address fields, refer to Help.



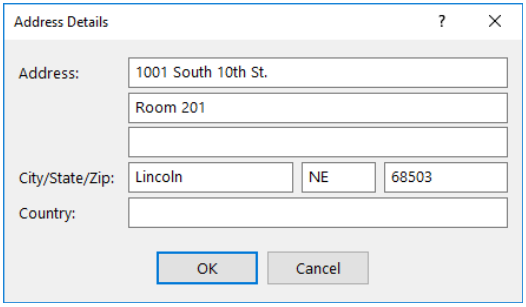


Figure 4, Contact Information window Address Fields

Figure 5, Address Details window

Phone/Email

You can configure up to 19 phone numbers and 3 email addresses for each contact. The Contact window displays four of the phone numbers and the default email address (designated with an asterisk). The selector next to each field allows you to select which option will be displayed for a particular contact when selected.

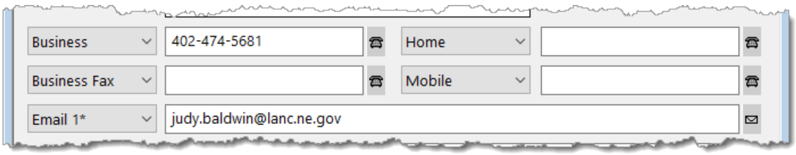


Figure 6, Contact Information window Phone and Email

Comments

The **Comments** field allows you to enter free-form information for a contact. The field can be spell checked and is searched when running a Conflict of Interest Check.

Contact Fields in PracticeMaster

Along with the Contact Information window used in Tabs3 Billing, Trust Accounting, Accounts Payable, and System Configuration, the PracticeMaster Contact file contains additional tabs for tracking case-related contact information.

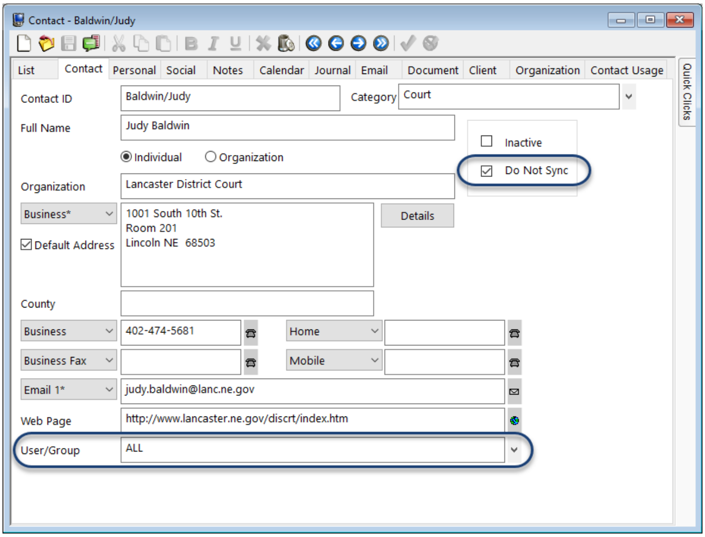


*Figure 7, PracticeMaster Contact file **Contact** tab*

Contact tab

Much of the information in the **Contact** tab of the Contact file in PracticeMaster is mirrored in Tabs3 Billing. Additional fields related to PracticeMaster are defined below.

Do Not Sync

The **Do Not Sync** check box is used to prevent contact records from synchronizing with Outlook.

User/Group

The **User/Group** field is used to assign contacts to specific users and/or groups. This field is used for filtering and reporting purposes, and allows you to control which contacts are sent to users' address books during Outlook Synchronization.

> **More Info:** For more information regarding contact synchronization, see the PracticeMaster Help or the Outlook Synchronization Guide.

Misc tab

The default **Misc** tab contains introductory information regarding the contact, such as greeting preferences for correspondence purposes (full name or last, salutation, etc.) general background, and tracking of contact dates.

Other tabs

The Contact file can be customized to display additional tabs for other files that link to the Contact file. From the **Quick Clicks** pane, expand the **Customize Current View** group and click **Configure Contact Pages** to see a list of tabs that can be displayed in the Contact file.

Best Practice: The **Organization** tab of the Contact file displays all contacts associated with an organization. We recommend selecting this tab in **Configure Contact Pages** in order to easily locate all contacts associated with an organization.

Converting Contacts into Clients

Creating a new client record from an existing contact record is simple. In both Tabs3 Billing and PracticeMaster, you can create a new client record as normal by selecting an existing contact from the Client Name drop-down. You can also use the **Create Client** function in the Contacts list to create a client directly from the Contact file. The **Create Client** option is available in the **Take Action** group of the Quick Clicks pane when in the Contacts list.

Clients, Payees, Vendors, Users, and Timekeepers

Clients and Matters

Although you can enter clients in Tabs3 Billing or PracticeMaster using the Client Information (or Client File) window, users will typically work from within one application. You can create a new contact record during the client creation process. This makes it easy to enter both clients and contacts “on the fly”. The client entry process is similar in Tabs3 Billing and PracticeMaster.

Tabs3 Software identifies clients and their matters through the use of *Client IDs*. All Client IDs can have a maximum of 12 characters including an optional decimal point. Typically, the portion of the Client ID to the left of the decimal represents the client and the portion of the Client ID to the right of the decimal represents an individual matter for the client. The client is the person requesting services, while the matter refers to the specific services being obtained. Clients can have one matter or many different matters.

Client ID	Client Name	Work Description	Phone	Email Address
850.00	White/Kelly	Divorce	213-474-4336	kelly_white_la@hushmail.com
850.01	White/Kelly	Last Will & Testament	213-474-4336	kelly@homeoffice.net
850.02	White/Kelly	Medical Care of Brianne	213-474-4336	kelly@homeoffice.net

Figure 8, Single client with multiple matters

Clients IDs can differ based on the firm’s Key Type. There are three Key Types to choose from: Numeric, Alpha, and Mixed. Each will affect the way Client IDs are created in Tabs3 Software. If you are unsure of which Key Type to use, we recommend using Numeric.

More Info: For more information on Key Types, see the Key Types section of the Help or the ***Administrator Guide***.

▸ To add a new client or matter in Tabs3 Billing and PracticeMaster

1. In the Tabs3 Billing Quick Launch, search for and select “Client Information.”
   ...or...
   In the PracticeMaster Quick Launch, search for and select “Client File.”

2. Click the icon on the toolbar.
3. The New Client Record window will displayed. Select the **Next Available Client ID**, **Next Available Matter**, or **Specific Client ID** option and enter a unique, unused Client ID.
4. Click **OK**.
5. Enter the **Client Name** using a "Last/First" format for individuals or a "First Last" format for organizations and press the *Tab* key. If the Contact already exists, proceed to step 8. Otherwise, proceed to step 6.
6. In the Contact Information window, enter the contact information for the client.
7. Click to save the new contact and return to the Client Information window.
8. Enter the remaining client information and click to save the new client record.

Additional information for each matter is entered on the various tabs of the Client file. The specific fields and tabs vary depending on whether you are using Tabs3 Billing or PracticeMaster.

Secure Clients

The Secure Clients feature allows you to limit access of sensitive client information to specific users. Marking a client secure prevents client information from being displayed on reports or during statement generation unless the user has rights to access the secure client.

▸ To mark a client secure

1. Select the **Secure Client** check box for the client you want to make secure.
2. Click the **Users** button.
3. Select each user you want to grant rights to the secure client.
4. Click **OK**.
5. Click to save the client record.

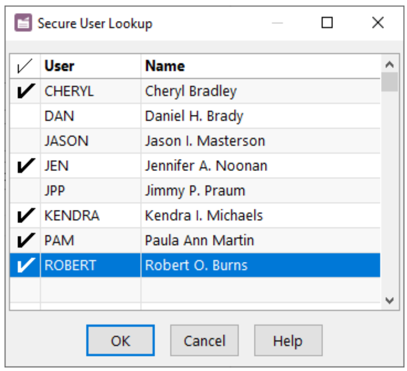


Figure 9, Select Secure Users window

Note: Manager users automatically have *all* rights to *all* client information, including secure clients.

Base Matters

The first matter number for a client ID is known as the *base matter*. When making changes to the base matter, you can optionally update all other matters with the new information at the same time. Upon saving changes to the base matter, a message similar to the following is displayed:

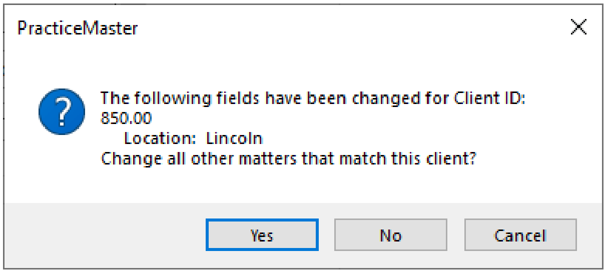


Figure 10, Base Matter Change window

Clients in Tabs3 Billing

Menu: ***File | Data Entry | Client***
Home: ***All Actions | People | Client Information***
Quick Launch: ***Client Information***

The Client Information window in Tabs3 Billing focuses on billing and statement information. Many of the fields in the Client Information window are self-explanatory. You can use the Tabs3 Billing Help to see detailed information on any field. The following highlights a few of the more important fields within Tabs3 Billing.

Address tab

The **Address** tab contains name and address information for both the client and the person being corresponded with regarding the case, known as the *matter contact*. Typically, when working on an individual's case, the client and matter contact are the same, whereas organizations will designate a single representative to work with the firm. In the following example, the client is MegaConstruction Corporation, whereas the matter contact is James R. Tatiki, Sr.

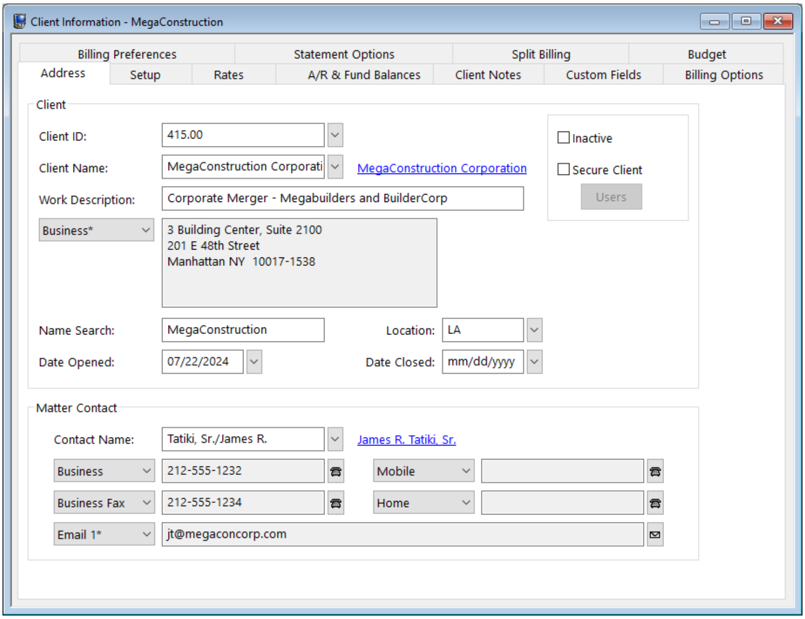


*Figure 11, Tabs3 Billing Client File **Address** tab*

Client ID	The **Client ID** is a unique identifier used to reference the client.
Client Name	Tabs3 Billing and PracticeMaster link contact information to client records. The client contact is linked via the **Client Name** field, with a link to the Contact Information appearing to the right of the **Client Name** field.
Inactive	The **Inactive** check box is used to identify client matters that are closed or no longer being actively worked on.
Work Description	The **Work Description** field serves as an explanation of the case. The **Work Description** can optionally appear on a client's billing statement.
Address	The **Address** section consists of a selector and an address block. The address that appears in the address block differs depending on which selector option is currently selected.

When **Home**, **Business**, or **Other** is selected, the address block will display the address from the linked client contact as read-only. If the currently selected client is marked as a secure client, the address block can be edited via the Client window by those users who have rights to the secure client. The selector will be labeled **Secure** and cannot be changed.

Selecting **Matter** for the selector allows you to edit the address block via the Client file. This option is typically used for unique address requirements without creating additional contact records.

Name Search

The **Name Search** field is used to access client records by name using an Alpha Search instead of by Client ID.

Matter Contact

The matter contact *(Figure 12)* represents the person to contact on behalf of the client. In most cases the matter contact is the same person as the client when the client is an individual, but is typically different than the client when the client is an organization.

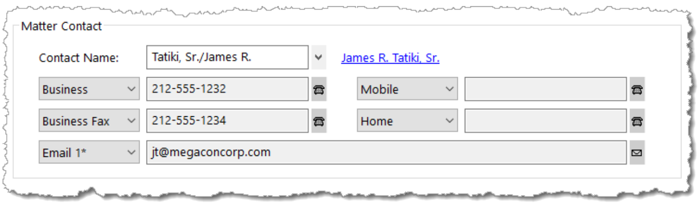


Figure 12, Tabs3 Billing Client File Matter Contact section

The matter contact determines the available phone numbers and email addresses for the client record.

Setup tab

The **Setup** tab contains information regarding the client’s billing category, report order timekeepers, billing status, and payment settings.

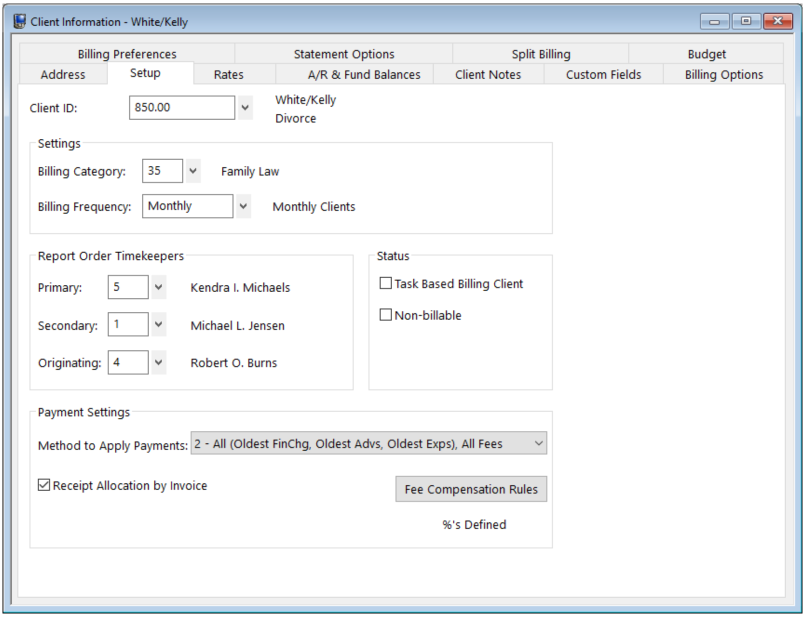


*Figure 13, Tabs3 Billing Client File **Setup** tab*

Billing Frequency

The **Billing Frequency** field is used to classify clients by their billing schedule. Examples of billing frequencies include Monthly Billing, Contingency Billing, Progress Billing, and more.

> **More Info:** Details can be found in Tabs3 Billing Help or in the ***Administrator Guide***.

Report Order Timekeepers

The **Primary**, **Secondary**, and **Originating** timekeeper fields determine the order in which clients will be displayed on reports run in timekeeper order and have no other effect on the software.

Task Based Billing Client

The **Task Based Billing** check box is used to designate clients who are billed according to the Universal Task Based Management System (UTBMS). Clients who are set as task based billing clients have their fees and costs entered differently.

> **More Info:** For more information on task based billing, see the Tabs3 Billing Help or the ***Billing Methods Guide***.

Fee Compensation Rules

The **Fee Compensation Rules** button is used to assign exact specifications for receipt allocation.

> **More Info:** For more information on Fee Compensation Rules, see the Tabs3 Billing Help or the ***Administrator Guide***.

Other tabs

The remaining tabs of the Client window are used to customize billing and statement settings. Additional information for each of these tabs can be found in the Tabs3 Billing Help as well as the ***Administrator Guide***, ***Billing Methods Guide***, ***Statement Formatting Guide***, and ***Statements Guide***.

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

Getting Started with Clients

Clients in PracticeMaster

Menu:	***File | Open | Client***
Home:	***All Actions | People | Client File***
Quick Launch:	***Client File***

The Client File in PracticeMaster focuses on case management. You can use the PracticeMaster Help to see detailed information on any field. The following highlights a few of the more important fields within PracticeMaster.

> **Note**: Because PracticeMaster tabs are customizable, the fields and screenshots in this guide may not match your firm's file layouts. The screenshots depicted here use the OEM layout that is shipped with PracticeMaster. See the PracticeMaster Help or the ***Customizing PracticeMaster Guide*** for more details.

List tab

The **List** tab allows you to select which record you want to work with. You can optionally display a **SnapShot** of matter-specific information in this view. The **List** can be filtered using the **Search Box** or the **Filter** group in the Quick Clicks pane.

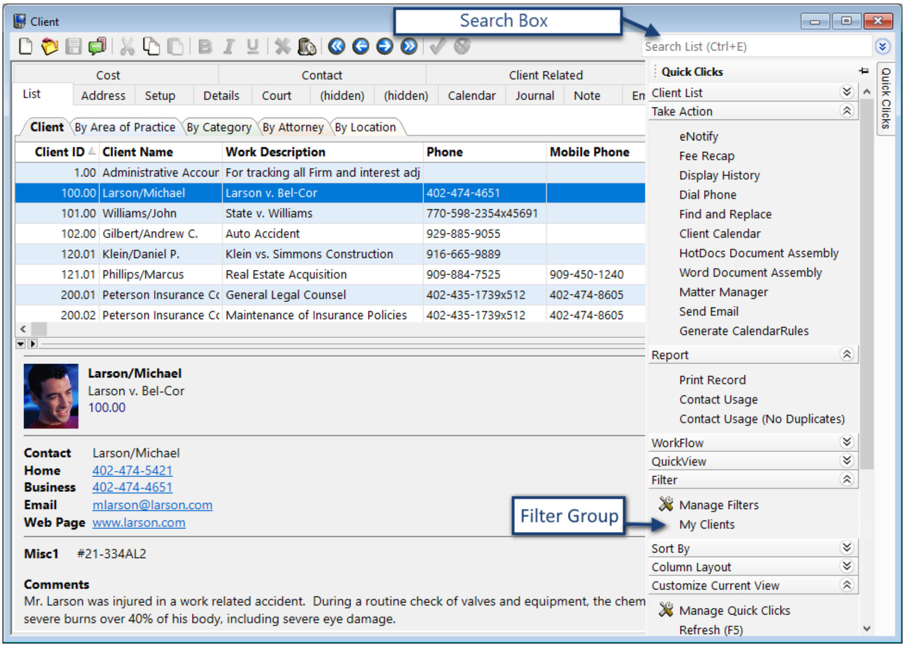


*Figure 14, PracticeMaster Client file **List** tab*

Address tab

The default **Address** tab in PracticeMaster is similar to the **Address** tab in Tabs3 Billing. As in the preceding sections, only fields that are not self-explanatory shall be explained in this Guide. Detailed information on any field can be found in PracticeMaster Help.

Setup tab

Like the Tabs3 Billing **Setup** tab, the **Setup** tab in PracticeMaster contains information regarding report order timekeepers and task based billing status. It also contains information regarding a matter's billing category (which is mirrored from Tabs3 Billing) and the matter's Area of Practice.

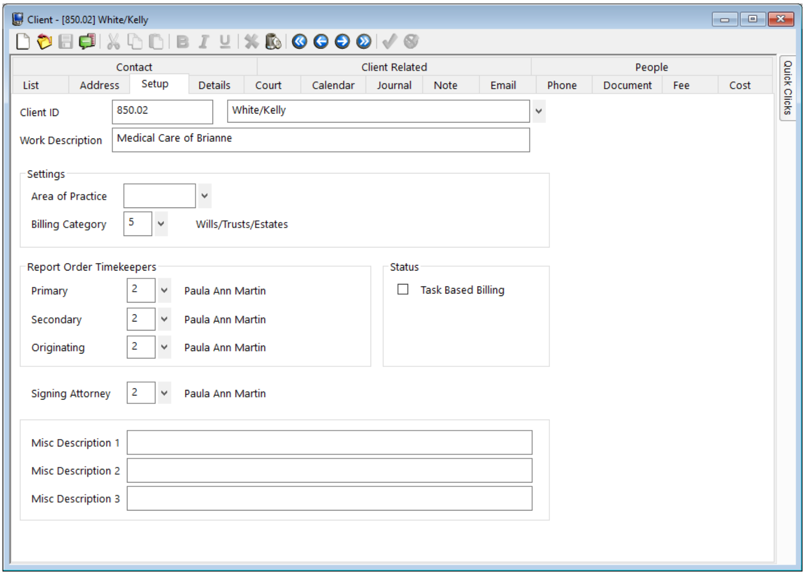


*Figure 15, PracticeMaster Client file **Setup** tab*

Area of Practice

An **Area of Practice** is a database of files specially tailored to a specific type of law, such as Probate, Real Estate, Estate, or Wills/Trusts/Estates. When an Area of Practice is selected for a matter, the individual files of the Area of Practice can appear as tabs at the top of the Client window.

Billing Category

Categories are used in Tabs3 Billing to classify fee services into related groups for purposes of generating productivity reports by category of work. This information is mirrored in PracticeMaster.

Details tab

The **Details** tab contains detailed information on the client contact as well as the specific matter.

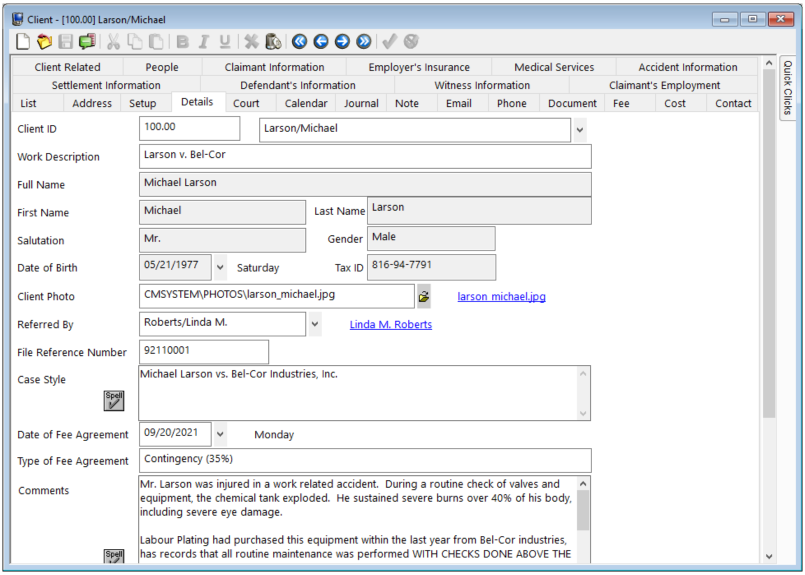


Figure 16, PracticeMaster Client file ***Details*** *tab*

Court tab

The default **Court** tab is used to enter information specific to the court involved in the matter. You can specify city, state, and county of jurisdiction as well as the opposing attorney, statute of limitations, and presiding judge.

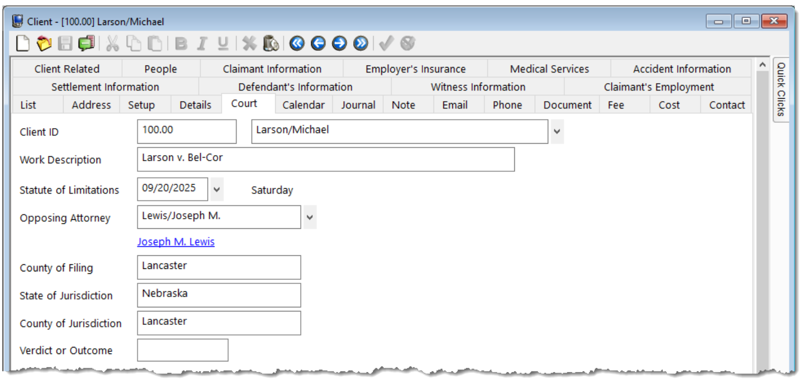


Figure 17, PracticeMaster Client file ***Court*** *tab*

Other tabs

Along with the tabs above, the Client file can be configured by each user to display Journal entries, Area of Practice files, fees, costs, and related contact information. From the **Quick Clicks** pane, expand the **Customize Current View** group and click **Configure Client Pages** to see a list of tabs that can be displayed in the Client file.

Detailed information on each of these tabs can be found in PracticeMaster Help. PracticeMaster offers the flexibility to customize the Client file to your firm's needs.

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at **Tabs3.com/video**.

Getting Started with Clients

Trust Accounts in Tabs3 Trust Accounting

Menu:	***File | Open | Trust Account***
Home:	***All Actions | Trust Accounts | Trust Account Information***
Quick Launch:	***Trust Account Information***

Similar to clients in Tabs3 Billing and PracticeMaster, Trust includes a Trust Account Information window to track information about trust accounts for matters. Trust account information is mirrored to Tabs3 Billing and PracticeMaster as client information.

Address tab

The **Address** tab in Trust is similar to the **Address** tab in Tabs3 Billing. Detailed information on any field can be found in Trust Help.

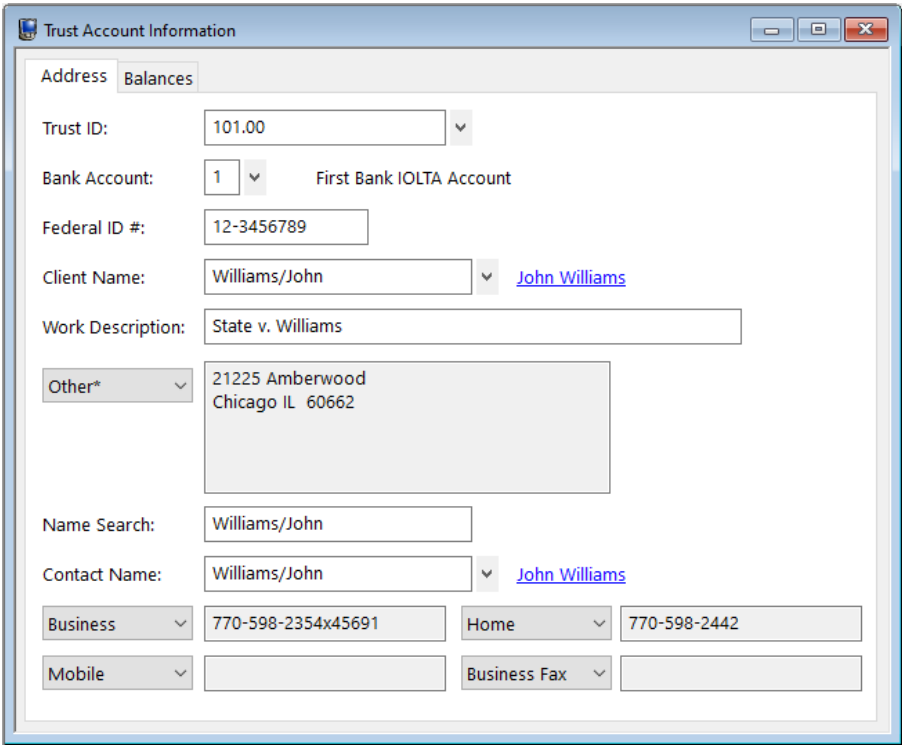


*Figure 18, Trust Account Information **Address** tab*

Balances tab

The **Balances** tab includes the trust account balance as well as additional account information.

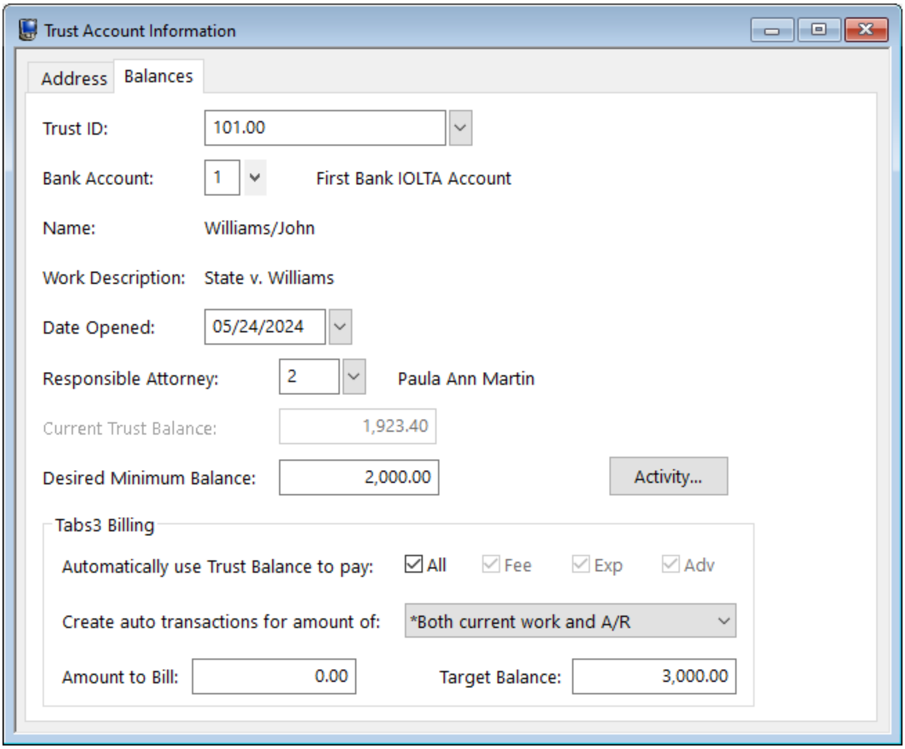


*Figure 19, Trust Account Information **Balances** tab*

More Info: Detailed information on trust accounts can be found in the Trust Help and the ***Trust Accounting Guide***.

Payees

Menu:	***File* | *Open* | *Miscellaneous* | *Payee***
Home:	***All Actions* | *Setup* | *Payee***
Quick Launch:	***Payee***

The Miscellaneous Data Entry window in Tabs3 Trust Accounting includes a **Payee** tab to track information about payees for trust transactions.

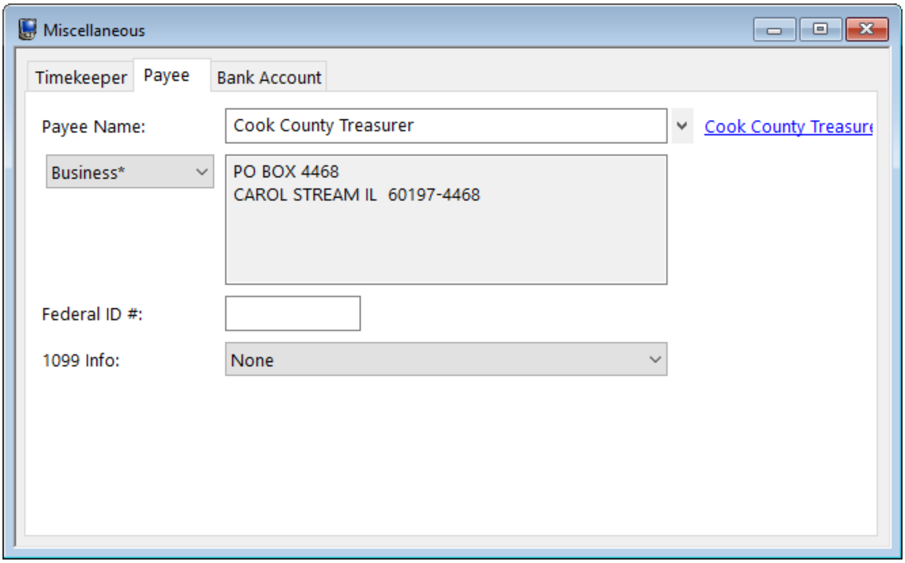


*Figure 20, **Payee** tab of Miscellaneous window in Trust*

Payee Name

Names and addresses for payees are stored in contact records. The **Payee Name** field designates the related contact, with a link to the Contact Information displayed to the right of the field.

Federal ID #

The **Federal ID #** field stores the Federal ID or Social Security number for payees that require an IRS Form 1099-MISC or 1099-NEC to be generated at the end of the year.

1099 Info

The **1099 Info** field determines whether Form 1099-MISC or Form 1099-NEC will be generated for the payee and, if so, in which box on the form the amount will print in (e.g., “MISC Box 10 - Gross proceeds paid to an attorney”).

More Info: Detailed information on payees can be found in the Trust Help and the ***Trust Accounting Guide***.

Vendors

Menu: ***File | Open | Vendor***
Home: ***All Actions | Vendor | Vendor Information***
Quick Launch: ***Vendor Information***

The Vendor Information window in Tabs3 Accounts Payable is used to track information about vendors for invoice payments. You can use the AP Help to see detailed information on any field. The following highlights a few of the more important fields within AP.

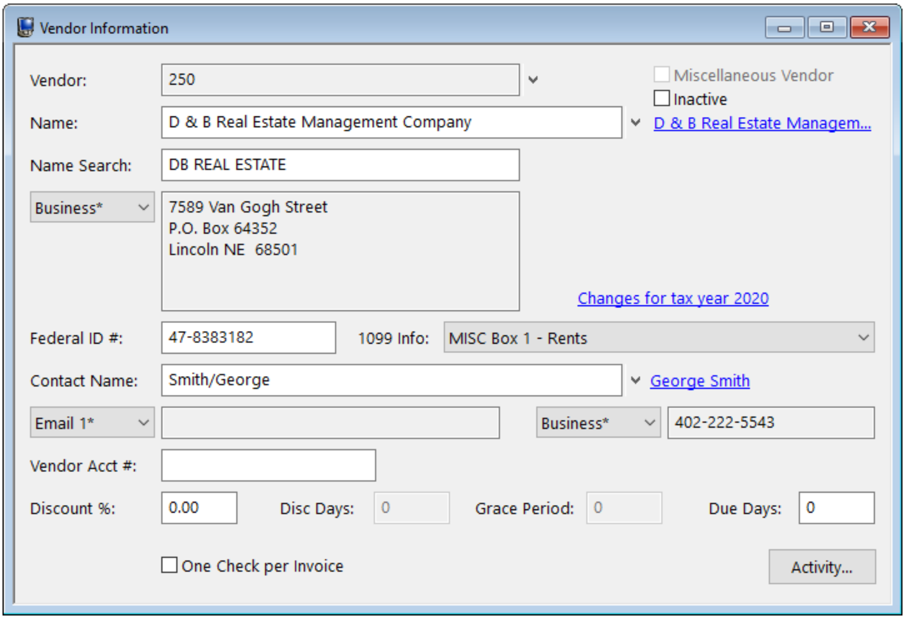


*Figure 21, **Vendor Inforamtion** window in AP*

Name

Names and addresses for payees are stored in contact records. The **Name** field designates the related contact, with a link to the Contact Information displayed to the right of the field. This contact will determine the name on checks and 1099s for the vendor.

Federal ID

The **Federal ID #** field stores the Federal ID or Social Security number for payees that require an IRS Form 1099-MISC or 1099-NEC to be generated at the end of the year.

1099 Info	The **1099 Info** field determines whether Form 1099-MISC or Form 1099-NEC will be generated for the payee and, if so, in which box on the form the amount will print in (e.g., "MISC Box 1 - Rents").
Contact Name	The **Contact Name** designates the person to contact regarding the vendor. In most cases the vendor contact is the same person as the vendor name when the vendor is an individual, but is typically different than the vendor name when the vendor is an organization.

More Info: Detailed information on vendors can be found in the AP Help and the ***Accounts Payable Guide***.

Users

Menu: ***File | Open | Users***

The User Configuration window in System Configuration is used to change user settings and modify their access rights in the Tabs3 Software. You can use the System Configuration Help to see detailed information on any field. The following highlights a few of the more important fields.

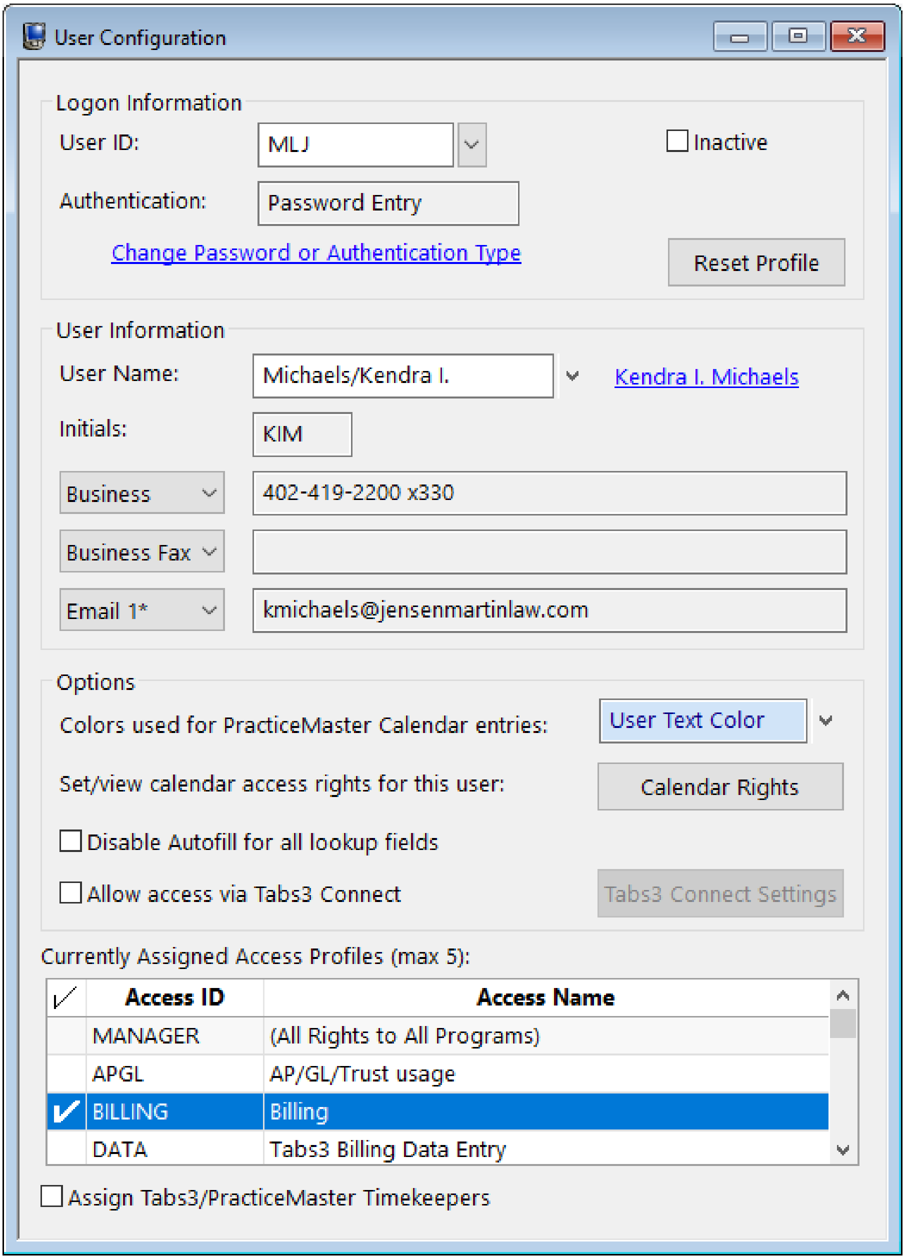


Figure 22, User Configuration window

User ID Authentication	The User ID and authentication option are used to log into the Tabs3 Software. User IDs can also be assigned to various transaction types, such as calendar records in PracticeMaster. Click the ***Change Password or Authentication Type*** link to open the Tabs3 Authentication window, where you can select whether to log in using a password, link the user to a Windows account (in the Platinum SQL edition), or specify that the user cannot log in to Tabs3 Software.
User Name	Names, initials, phone numbers, and email addresses for users are stored in contact records. The **User Name** field designates the related contact, with a link to the Contact Information displayed to the right of the field.
Access Profiles	Selecting one or more **Access IDs** in the Currently Assigned Access Profiles table grants users access to features in the Tabs3 Software applications. The features granted are specified in the access profile. Users with no access profiles assigned are unable to log into any Tabs3 Software application.

More Info: Detailed information on users can be found in the System Configuration Help and the ***Administrator Guide***.

The Add New User wizard is used to create users and specify their settings throughout the Tabs3 Software. You can use the Help to see detailed information on any field. The following highlights a few of the more important fields.

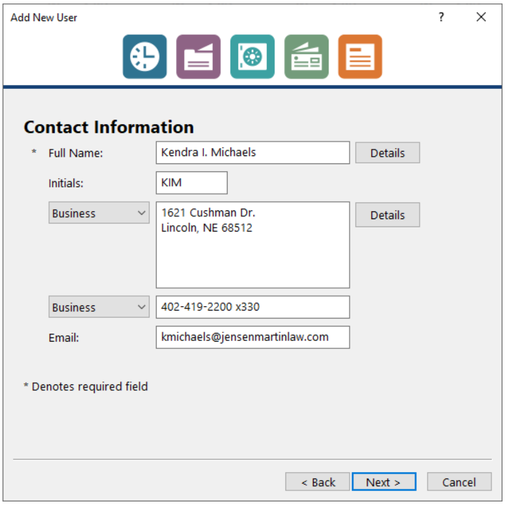


*Figure 23, **Contact Information** panel of the Add New User wizard*

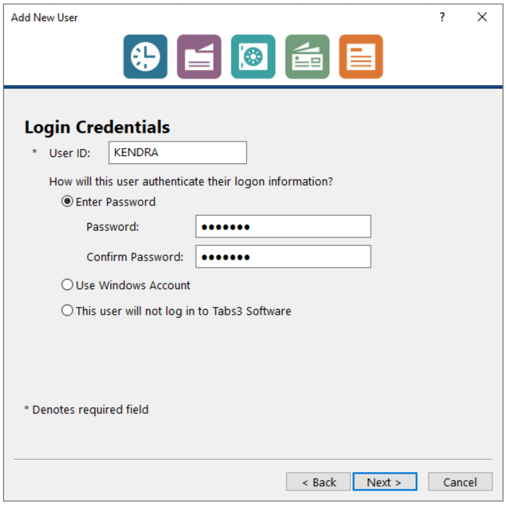


*Figure 24, **Login Credentials** panel of the Add New User wizard*

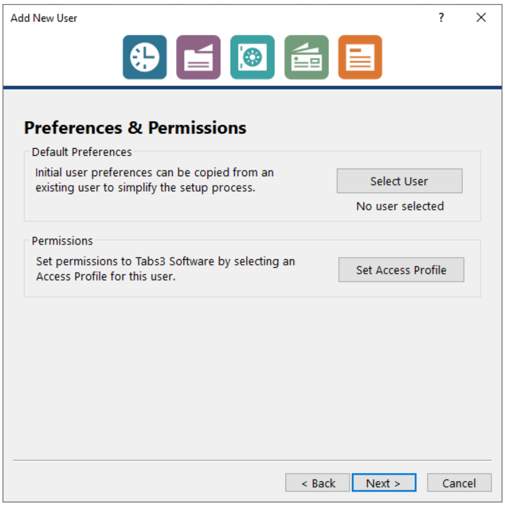


*Figure 25, **Preferences & Permissions** panel of the Add New User wizard*

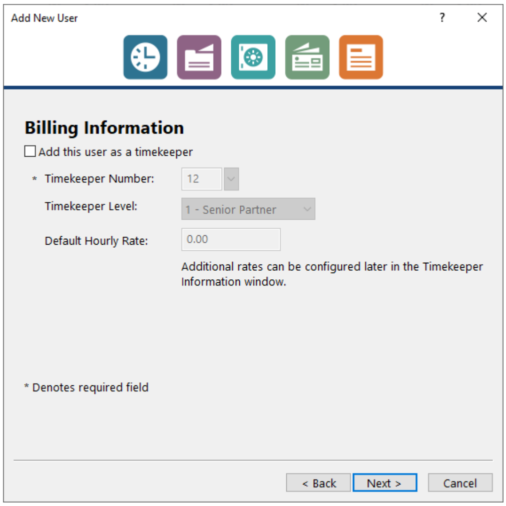


*Figure 26, **Billing Information** panel of the Add New User wizard*

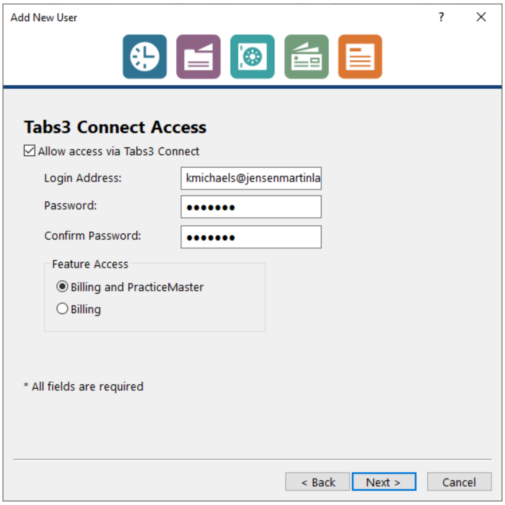


*Figure 27, **Tabs3 Connect Access** panel of the Add New User wizard*

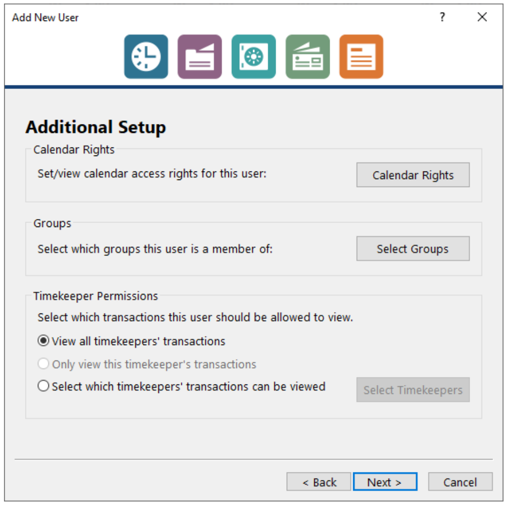


*Figure 28, **Additional Setup** panel of the Add New User wizard*

More Info: A user can also be created when adding a timekeeper in Tabs3 Billing or PracticeMaster. Detailed information on timekeepers can be found in the Tabs3 Billing Help and the ***Administrator Guide***.

Timekeepers

Timekeepers are users for whom time is billed. Tabs3 Billing maintains work-in-process, archive, and productivity information for reporting, such as hours billed and receipt allocation. PracticeMaster and Trust share information from the Tabs3 Billing Timekeeper file.

Timekeepers in Tabs3 Billing

Menu: ***File | Open | Miscellaneous | Timekeeper***
Home: ***All Actions | Setup | Timekeeper Information***
Quick Launch: ***Timekeeper Information***

The Miscellaneous Data Entry window in Tabs3 Billing includes a **Timekeeper** tab to track information about timekeepers.

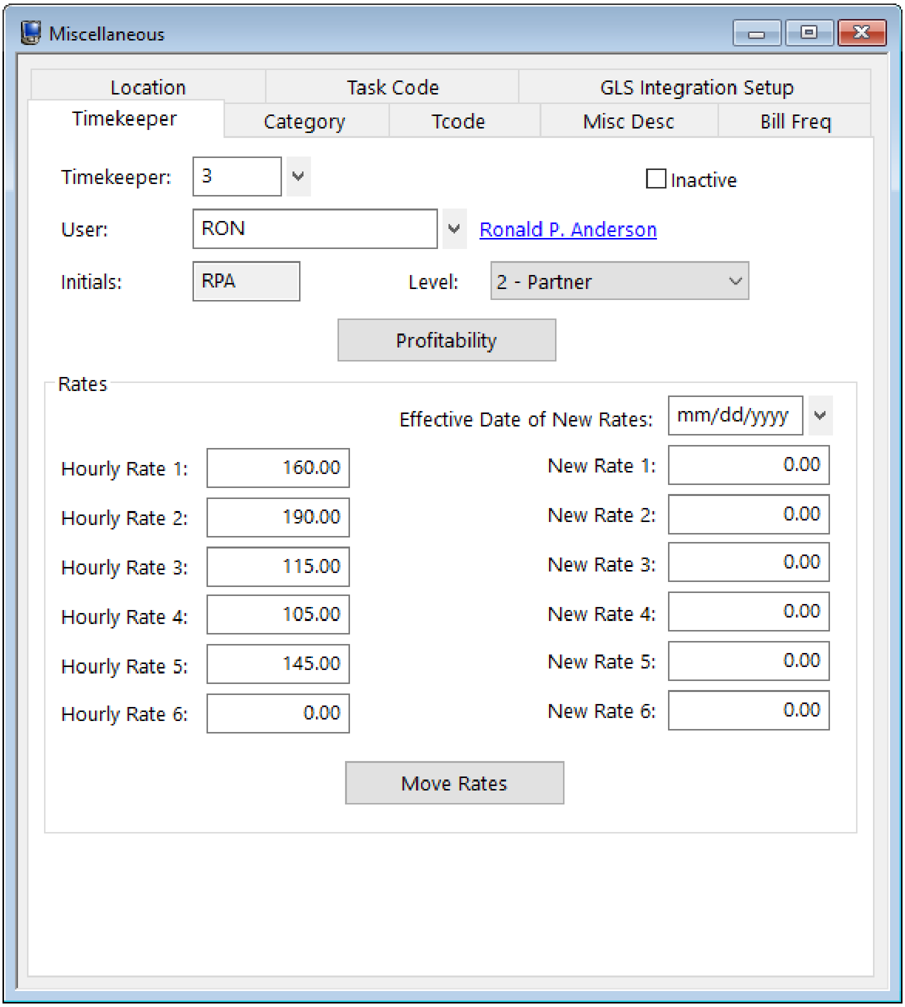


*Figure 29, **Timekeeper** tab of Miscellaneous Data Entry in Tabs3 Billing*

Timekeeper

Each timekeeper whose time is billed is assigned a **Timekeeper Number**, which is used when creating fee transactions. Timekeepers can optionally be specified for cost transactions as well.

User

The **User** field designates which user this timekeeper record is for. Names and initials for users are stored in contact records. A link to the Contact Information is displayed to the right of the field.

Level

The **Timekeeper Level** is used for grouping timekeepers on reports (e.g., Level 1 could be partners, Level 2 could represent associates, etc.).

Profitability

Tabs3 Billing optionally maintains overhead costs for timekeepers, which can be used to determine profitability. Click the **Profitability** button to enter monthly overhead costs.

Rates

Tabs3 Billing allows you to define up to six **Hourly Rates** for a timekeeper. You can optionally designate a date at which rates will change, allowing you to automatically utilize those rates for transactions after that date.

Timekeepers in PracticeMaster and Trust

Menu: *(PracticeMaster) File | Open | All Other Files | Billing Files | Timekeeper*
(Trust) File | Open | Miscellaneous | Attorney

Home: *(PracticeMaster) All Actions | Setup | Timekeeper File*
(Trust) All Actions | Setup | Attorney

Quick Launch: *(PracticeMaster) Timekeeper File*
(Trust) Attorney

PracticeMaster and Trust share the timekeeper information with Tabs3 Billing. However, PracticeMaster uses only the first Hourly Rate defined, and Trust does not maintain any rate information.

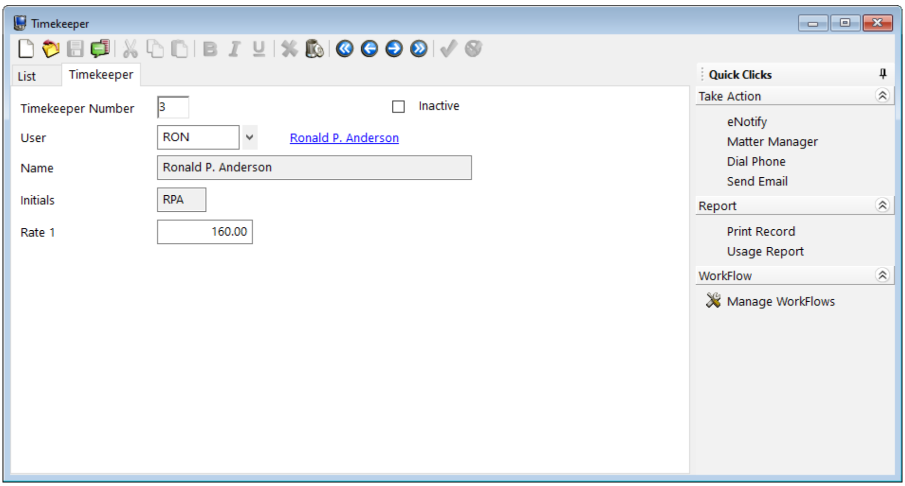


Figure 30, Timekeeper File in PracticeMaster

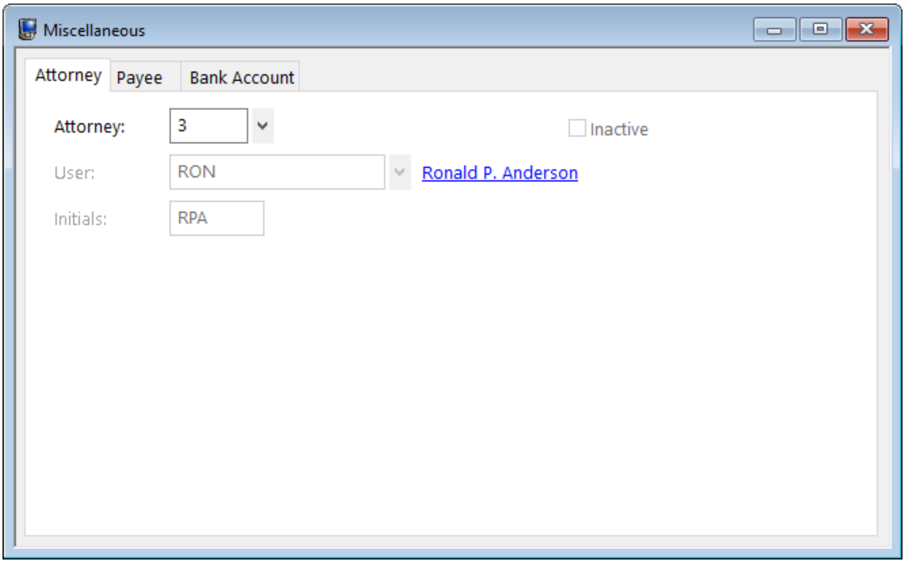


*Figure 31, **Attorney** tab of Miscellaneous Data Entry in Trust*

More Info: Detailed information on timekeepers can be found in the Tabs3 Billing Help and the ***Administrator Guide***.

Contact Usage

The Contact Usage feature, available in PracticeMaster, is a powerful tool that displays a list of all records in which the selected contact is used. This information can be accessed via the **Contact Usage** tab of the contact file or by running a Contact Usage Report. This differs from the **Organization** tab in that the **Organization** tab only lists the contact information for each contact associated with an organization, where Contact Usage displays all instances where a contact is linked in the software.

Contact Usage Tab

Menu:	***File | Open | Contact | Contact Usage tab***
Home:	***All Actions | People | Contact File | Contact Usage tab***
Quick Launch:	***Contact File | Contact Usage tab***

The Contact Usage tab can be displayed using one of four Views: **Detail**, **Client Summary**, **File**, or **Record**.

Detail

The **Detail** option provides a list of all records in which the selected contact is used. If a record is associated with a client, the Client ID, name, and work description are displayed followed by the file and field name the record appears in. Records not associated with a client are displayed at the top of the list with the file and field name.

Client Summary

The **Client Summary** option provides a list of all records for clients with which the selected contact is associated. The Client ID, name, and work description are displayed. This list will only display information when the contact is linked to a client record.

File

The **File** option provides a list of all records assigned to a contact grouped by file. For example, a calendar record with a contact assigned to it will be displayed under the Calendar file group.

Record

The **Record** option provides a list of all records assigned to a contact. The records are sorted based on the modified date with the most recently modified record displayed at the top.

In the following example, the **View** is set to **Record**.

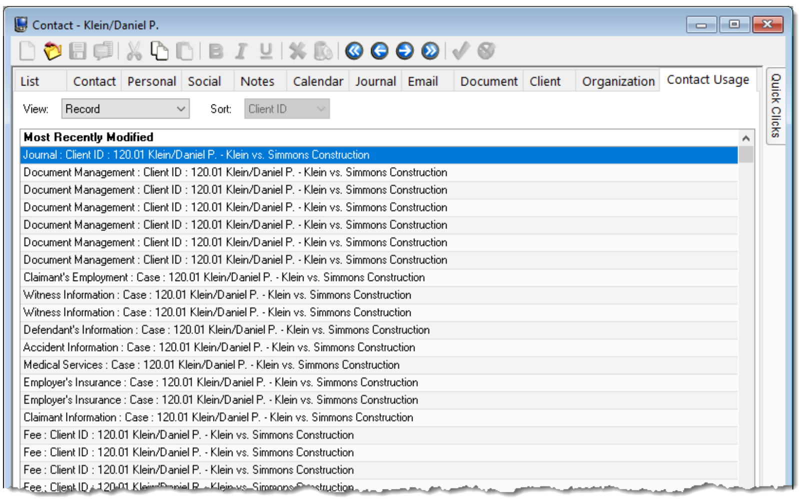


Figure 32, PracticeMaster Contact file ***Contact Usage*** *tab*

Contact Usage Reports

You can generate printable reports containing contact usage information. These reports consist of the Contact Usage Report, which displays all usage information, the Calendar Usage Report, which displays calendar records that include the contact, and the Journal Usage Report, which displays journal records that include the contact. These reports are accessible via the **List** tab of the Contact file in the **Reports** group of the **Quick Clicks** pane.

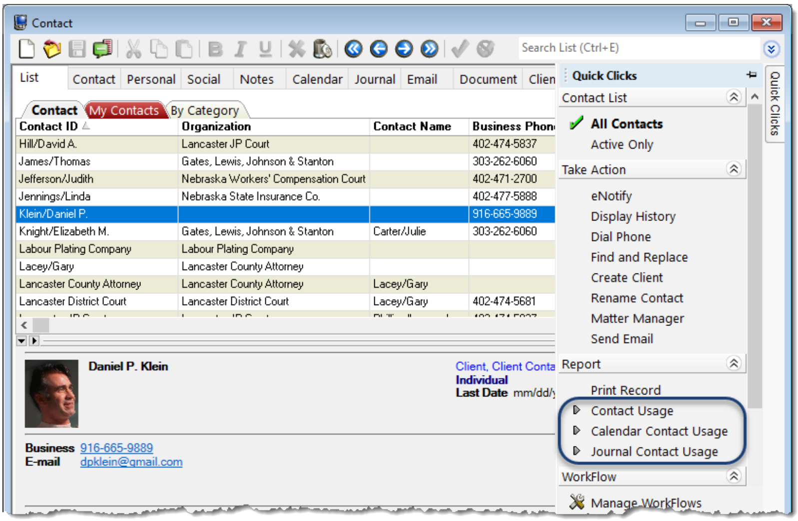


*Figure 33, Contact Usage Reports via **Quick Clicks** pane in PracticeMaster*

Date: 08/21/2024

Contact Usage Report

Page: 1

File(s) Searched: All Files
Contact ID: Klein/Daniel P.

File	Field	Client ID	Client Name	Client Desc	Calendar/Journal Desc
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Verify receipt of medical records req
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Joint Statement of Evidence
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Initial Client Meeting
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Hearing
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Hearing
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Hearing
Client	Client Name	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Client	Contact Name	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Document Managem	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Document Managem	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Document Managem	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Document Managem	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Document Managem	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Document Managem	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Scaffolding information

Total records found: 15

Figure 34, PracticeMaster Contact Usage Report

Contact Utilities

Tabs3 Software applications contain features designed to help you manage your contacts more easily.

Rename Contact

Menu:	***(Tabs3 Billing/PracticeMaster/Trust/AP) Maintenance | Renumber | Rename Contact***
Home:	***(Tabs3 Billing/PracticeMaster/Trust) All Actions | Utilities & Maintenance | Renumber Utilities | Rename Contact*** ***(AP) All Actions | Vendor | Rename Contact***
Quick Launch:	***Rename Contact***

The Rename Contact utility makes it easy to change a contact name.

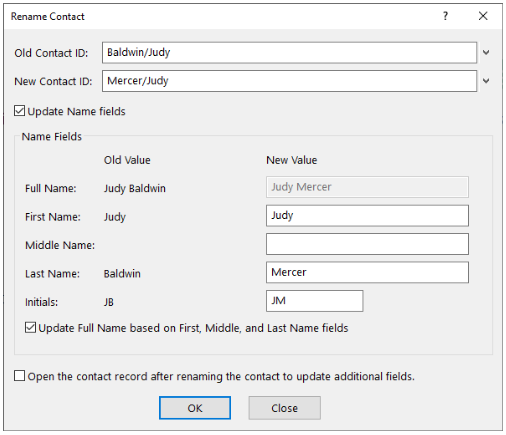


Figure 35, Rename Contact window

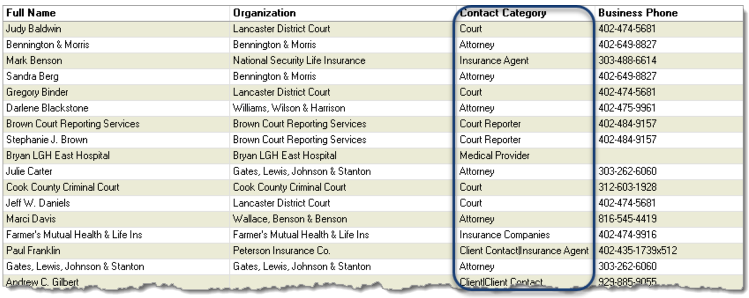
Suppose Judy Baldwin has married and is now Judy Mercer. Use the **Old Contact ID** drop-down to select the existing Contact ID, then simply type in the **New Contact ID** in the field below. You can optionally select the **Update Name fields** box to update the **Full Name**, **First Name**, **Middle Name**, **Last Name**, and **Initials** fields as well. Select the **Update Full Name based on First, Middle, and Last Name fields** check box to calculate the **Full Name** with any changes to the individual fields. Additionally, you can select the **Open the contact record after renaming the contact to update additional fields** check box to quickly update additional contact information such as email addresses.

Contact Categories

Contact categories are available in PracticeMaster to help simplify the filtering process by allowing you to classify contacts based on similar attributes. You can assign up to twenty different contact categories to a single contact. You can also define your own contact categories.

▸ To create a new Contact Category

1. In the PracticeMaster Quick Launch, search for and select "Contact File."
2. Click the **Contact** tab to the right of the **List** tab.
3. Find the **Contact Category** field and click the drop-down button on the right side to open the Contact Categories window.
4. Click the **New** button.
5. Enter the desired Contact Category.
6. Click **OK** to save the new Contact Category.



Full Name	Organization	Contact Category	Business Phone
Judy Baldwin	Lancaster District Court	Court	402-474-5681
Bennington & Morris	Bennington & Morris	Attorney	402-649-8827
Mark Benson	National Security Life Insurance	Insurance Agent	303-488-6614
Sandra Berg	Bennington & Morris	Attorney	402-649-8827
Gregory Binder	Lancaster District Court	Court	402-474-5681
Darlene Blackstone	Williams, Wilson & Harrison	Attorney	402-475-9961
Brown Court Reporting Services	Brown Court Reporting Services	Court Reporter	402-484-9157
Stephanie J. Brown	Brown Court Reporting Services	Court Reporter	402-484-9157
Bryan LGH East Hospital	Bryan LGH East Hospital	Medical Provider	
Julie Carter	Gates, Lewis, Johnson & Stanton	Attorney	303-262-6060
Cook County Criminal Court	Cook County Criminal Court	Court	312-603-1928
Jeff W. Daniels	Lancaster District Court	Court	402-474-5681
Marci Davis	Wallace, Benson & Benson	Attorney	816-545-4419
Farmer's Mutual Health & Life Ins	Farmer's Mutual Health & Life Ins	Insurance Companies	402-474-9916
Paul Franklin	Peterson Insurance Co.	Client Contact|Insurance Agent	402-435-1739x512
Gates, Lewis, Johnson & Stanton	Gates, Lewis, Johnson & Stanton	Attorney	303-262-6060
Andrew C. Gilbert		Client|Client Contact	929-885-9055

Figure 36, PracticeMaster Contact file ***Contact Categories***

Merge Contacts

Menu: ***Maintenance | Renumber | Merge Contacts***

Home: ***Utilities & Maintenance | Renumber Utilities | Merge Contacts***

Quick Launch: ***Merge Contacts***

The Merge Contacts utility, available in PracticeMaster only, is used to combine information from two contact records into a single contact record. This is especially useful in situations where two different users have entered the same contact information with slightly differing values.

Figure 37, Merge Contacts window

▸ To merge two contact records into a single Contact record:

1. In the PracticeMaster Quick Launch, search for and select "Merge Contacts."
2. Enter the Contact IDs of the contacts you want to merge in the **Contact 1** and **Contact 2** fields.
3. Select the **Differing Fields**, **Fields with Values**, or **All Fields** radio button to display information for each contact. We recommend selecting **Differing Fields** in order to easily locate discrepancies.
4. Select each field you want to keep in the merged contact record. Only highlighted fields will be retained.
5. Click **Merge**.

Other Utilities

The utilities discussed in this section are designed to simplify the process of updating client, trust account, payee, and vendor information.

Renumber Client

Menu: ***(Tabs3 Billing/PracticeMaster) Maintenance | Renumber | Client***
Home: ***(Tabs3 Billing/PracticeMaster) All Actions | Utilities & Maintenance | Renumber Utilities | Renumber Client***
Quick Launch: ***Renumber Client***

The Renumber Client utility in Tabs3 Billing and PracticeMaster is used to assign a new Client ID to an existing client. This process affects the client's accounts receivable, work-in-process transactions, archive transactions, and productivity amounts.

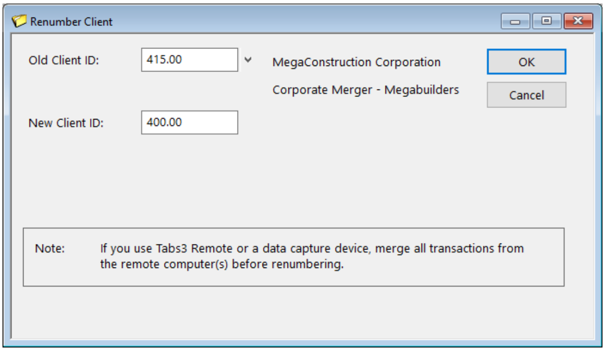


Figure 38, Renumber Client window in Tabs3 Billing

Renumber Trust Account

Menu: ***Maintenance | Renumber | Trust Account***
Home: ***All Actions | Utilities & Maintenance | Renumber Utilities | Renumber Trust Account***
Quick Launch: ***Renumber Trust Account***

The Renumber Trust Account utility in Tabs3 Trust Accounting is used to assign a new Trust ID to an existing trust account, and optionally change the bank assigned. This process affects the trust account's checks, deposits, EFTs, and voided checks.

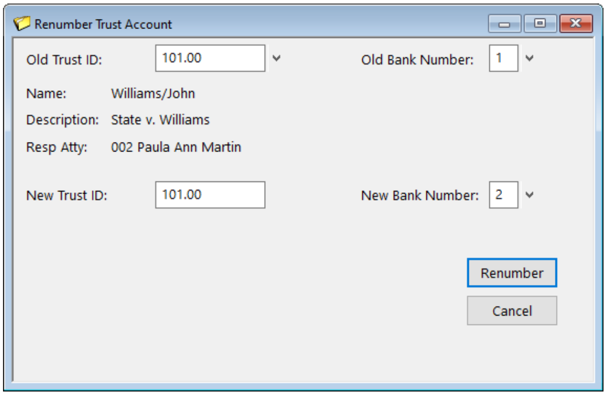


Figure 39, Renumber Trust Account window

Renumber Vendor

Menu: *Maintenance | Renumber | Vendor*
Home: *All Actions | Vendor | Renumber Vendor*
Quick Launch: *Renumber Vendor*

The Renumber Vendor utility in Tabs3 Accounts Payable is used to assign a new Vendor Number to an existing vendor. This process affects the vendor's invoices, manual checks, EFTs, posted checks and EFTs, voided checks, recurring entries, and vendor productivity amounts.

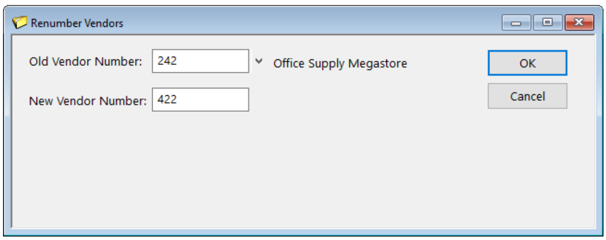


Figure 40, Renumber Vendor window

Renumber Timekeeper

Menu: *(Tabs3 Billing/PracticeMaster) Maintenance | Renumber | Timekeeper*
(Trust) Maintenance | Renumber | Attorney
Home: *(Tabs3 Billing/PracticeMaster) All Actions | Utilities & Maintenance | Renumber Utilities | Renumber Timekeeper*
(Trust) All Actions | Utilities & Maintenance | Renumber Utilities | Renumber Attorney
Quick Launch: *(Tabs3 Billing) Renumber Timekeeper*
(PracticeMaster) Renumber Timekeepers
(Trust) Renumber Attorney

The Renumber Timekeeper utility is used to assign a new Timekeeper Number to an existing timekeeper, or to combine timekeeper productivity and transactions. This process affects the timekeeper's work-in-process, archive, and productivity information.

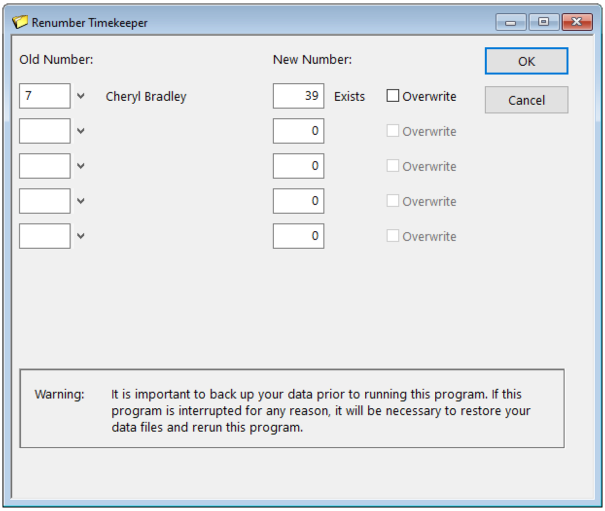


Figure 41, Renumber Timekeeper window in Tabs3 Billing

Change Client Options

Menu: ***Maintenance | Client Related | Change Client Options***
Home: ***All Actions | People | Change Client Options***
Quick Launch: ***Change Client Options***

The Change Client Options utility in Tabs3 Billing is used to change options in the Client file for one or more clients. This is especially useful in situations where you may need to make a system-wide change, such as implementing sales tax for all clients. The **Client** tab allows you to enter a range of clients and optionally filter by specific settings, whereas the remaining tabs contain information that can be updated using Change Client Options.

More Info: Detailed instructions on using the Change Client Options utility can be found in the Tabs3 Billing Help.

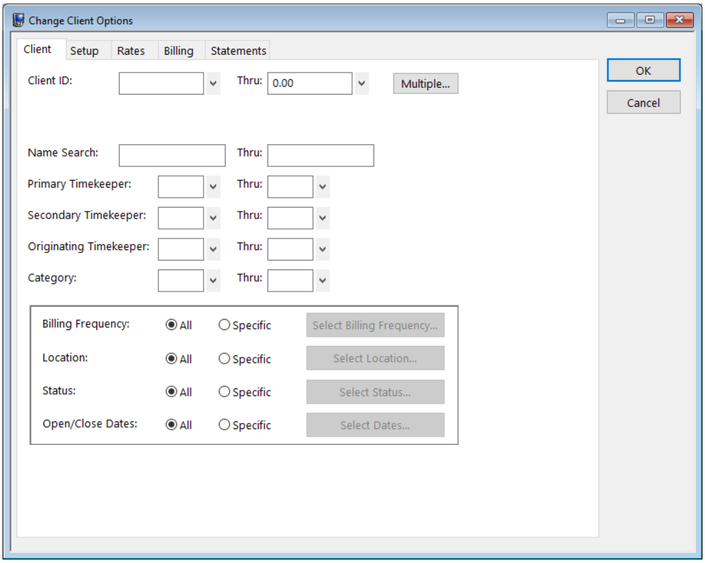


Figure 42, Tabs3 Billing Change Client Options window

Contact Reports

Menu:	***(Tabs3 Billing) Reports | Client | Client List Report*** ***(Tabs3 Billing) Reports | Miscellaneous | Timekeeper List*** ***(PracticeMaster) Reports | Report Writer | Master Client List*** ***(PracticeMaster) Reports | Report Writer | Detail Contact List*** ***(PracticeMaster) Reports | Report Writer | Timekeeper List*** ***(Trust) Reports | Miscellaneous | Attorney List*** ***(Trust) Reports | Miscellaneous | Payee List*** ***(AP) Reports | Vendors | Vendor List*** ***(System Configuration) Reports | User List***
Home:	***(Tabs3 Billing) All Actions | Reports | Client Reports | Client List Report*** ***(Tabs3 Billing) All Actions | Reports | File Lists | Timekeeper List*** ***(PracticeMaster) All Actions | Reports | Report Writer Reports | Master Client List Report*** ***(PracticeMaster) All Actions | Reports | Report Writer Reports | Detail Contact List Report*** ***(PracticeMaster) All Actions | Reports | Report Writer Reports | Timekeeper List Report*** ***(Trust) All Actions | Reports | Attorney List*** ***(Trust) All Actions | Reports | Payee List*** ***(AP) All Actions | Reports | Vendor List***
Quick Launch:	***(Tabs3 Billing) Client List Report*** ***(Tabs3 Billing) Timekeeper List*** ***(PracticeMaster) Master Client List Report*** ***PracticeMaster) Detail Contact List Report*** ***(PracticeMaster) Timekeeper List Report*** ***(Trust) Attorney List*** ***(Trust) Payee List*** ***(AP) Vendor List***

Various List reports can be generated in Tabs3 Software that include contact information. The Tabs3 Billing Client List Report includes client and contact information and can be run in Detail or Summary mode depending on the amount of information required. PracticeMaster's robust Report Writer feature allows you to modify the existing Client List reports or create a report of your own. PracticeMaster also includes several Contact Lists that can be customized to fit your firm's needs. The Timekeeper List in Tabs3 Billing, Attorney List and Payee List in Trust, Vendor List in AP, and User List in System Configuration also include contact information.

Date: 08/26/2024 **Tabs3 Client List Report** Page: 1
Jensen, Martin & Anderson, P.C.

100.00M Larson/Michael

		Larson/Michael RE: Larson v. Bel-Cor #21-334AL2	**Date Opened:**	06/25/2024
P: 001 MLJ S: 003 RPA O: 001 MLJ	**Bus:**	123 Washington St. Lincoln NE 68508	**Location:** **Rate Code:** **Category:**	Lincoln 1 010 *Workers' Compensation*
	Contact:	Michael Larson		
	Company:		**Home:**	402-474-5421
	Mobile:		**Business:**	402-474-4651
	Email:	mlarson@larson.com		
	Stmt Delivery:	Mail/Email	**Email Template:**	EXAMPLE

101.00M Williams/John

		Williams/John RE: State v. Williams	**Date Opened:**	05/22/2024
P: 002 PAM S: 001 MLJ O: 001 MLJ	**Other:**	21225 Amberwood Chicago IL 60662	**Location:** **Rate Code:** **Category:**	Omaha 0 050 *Criminal Law*
	Contact:	John Williams		
	Business:	770-598-2354x45691	**Home:**	770-598-2442
	Mobile:		**Business Fax:**	
	Email:	jw2000@net.com		
	Stmt Delivery:	Mail/Email	**Email Template:**	EXAMPLE2
			Flat Amount:	579.90

Figure 43, Tabs3 Billing Detail Client List Report

Date: 08/26/2024 **Master Client List** Page: 1
Jensen, Martin & Anderson, P.C.

Case Range: 100.00 to 999.99
Attorney Range: 1 to 999

Larson/Michael 123 Washington St. Lincoln, NE 68508 100.00	WC	Larson v. Bel-Cor	Larson/Michael	402-474-4651	MLJ
Williams/John 21225 Amberwood Chicago, IL 60662 101.00	CRIMLAW	State v. Williams	Williams/John	770-598-2354x45691	PA
Gilbert/Andrew C. 8974 Weatherby Road Roswell, NM 88277 102.00	PI	Auto Accident	Gilbert/Andrew C.	929-885-9055	PA
Klein/Daniel P. 795 North Apple Sacramento, CA 98654 120.01	WC	Klein vs. Simmons Construction	Klein/Daniel P.	916-665-9889	RP

Figure 44, PracticeMaster Master Client List

More Info: Detailed information about each report listed can be found in the Sample Report Packs, available at **Tabs3.com/docs**.

Resources

Clients and contacts are an integral part of the Tabs3 Billing and PracticeMaster software. Along with the basic concepts introduced in this Guide, there are several additional resources available, including:

Help

The Help contains detailed information on all features of the software. The Help is accessible by pressing F1 from anywhere within the software; doing so will load the Help information for the particular topic being accessed.

Training Videos

Training videos are multimedia resources that walk you through Tabs3 Billing and PracticeMaster features. In the Quick Launch, search for and select “Training Videos” to access the training video libraries. The training videos can also be accessed at:

Tabs3.com/videos

Knowledge Base

The Knowledge Base includes information regarding Tabs3 Software applications and is provided for end-users, consultants, and other third parties who work with Tabs3 Software. It contains extensive information on Error Troubleshooting, Networking & Windows Issues, “How To” articles and application-related articles. You can access the Knowledge Base in the Quick Launch by searching for and selecting “Knowledge Base,” or from your web browser at **support.tabs3.com**.

Guides

Additional Guides are available to help you familiarize yourself with the Tabs3 Software. Also available are Sample Report Packs, which provide detailed descriptions, definitions, and examples of reports included with the software.

All guides and sample report packs are available on our website at:

Tabs3.com/support/docs.html

Tabs3 Support

Tabs3 Software provides some of the best support in the industry. Service to our customers is extremely important to us—so much so that our motto is:

Reliable software. Trusted service.

Support is provided at no charge with an active subscription and is available from 8:00 a.m. to 5:00 p.m. Central Time, Monday through Friday. If you have any questions, please feel free to call our Support staff at (402) 419-2210.

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