

LawPay Integration Guide











Accounts Payable

PracticeMaster

General Ledger

TABS3.COM

Trust Accounting

LawPay Integration Guide

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Introduction & Getting Started

Tabs3 Software has partnered with LawPay[®] (an AffiniPay solution) to provide electronic processing of credit card and eCheck transactions in Tabs3 Billing and Tabs3 Trust Accounting (Trust) for payments and deposits.

Integration with LawPay gives you the ability to:

- Include a payment link when emailing statements.
- Authorize electronic payments in Tabs3 Billing.
- Authorize electronic client funds deposits in Tabs3 Billing.
- Authorize electronic deposits in Tabs3 Trust Accounting (Trust).
- Credit or void electronic transactions entered in Tabs3 Billing and Trust.

LawPay allows you to link multiple bank accounts to your LawPay account. You can then assign these bank accounts to your firm, to separate locations, and to individual primary timekeepers or any combination thereof. This allows you to route payments and deposits to multiple bank accounts. Additionally, Trust allows you to link LawPay bank accounts to separate trust bank accounts.

LawPay accepts the following credit card types:

- Visa®
- Mastercard®
- Discover®
- American Express®

Additionally, LawPay accepts eChecks (directly debiting a checking or savings account using the automated clearing house [ACH] system) for Tabs3 Billing payments and client funds deposits.

Note: The LawPay integration feature in Tabs3 Trust Accounting does not accept eChecks for trust deposits at this time.

Once LawPay has been enabled and configured, you can include payment links with your email statements. These links allow clients to make payments online via a LawPay payment page using a credit card or eCheck. Payments can then be imported into Tabs3 Billing using the Import Online Payments window.

Transactions can also be entered manually via the Payment Entry and Client Funds Entry windows in Tabs3 Billing and the Trust Transaction Entry window in Trust. You can specify an email address for each payment method, allowing the cardholder or client to receive a receipt for each transaction. You can also print or email a <u>Credit Card Transaction</u> <u>Receipt</u> (page 28) as needed. A <u>Credit Card Authorization List</u> (page 31) provides a list of electronic transactions authorized via Tabs3 Billing or Trust for a specified time period and can include charges, voids, credits, or any combination thereof.

If you are considering electronic payment processing for the first time, please see Knowledge Base Article **R11871**, "Tabs3Pay Frequently Asked Questions," for information on Tabs3Pay, our recommended payment processing solution.

Security

Tabs3 Software does not transmit or receive sensitive credit card or banking information directly. All transmission and storage of sensitive data is handled by LawPay. Tabs3 Software only stores the Credit Card Type and the last four digits of the credit card number or bank account number. Tabs3 Software does not store Credit Card Numbers, Expiration Dates, Security Codes (i.e., Card Verification Values of CVV, CVV2, CVC2, or CID type), or PIN numbers.

Requirements

To accept electronic payments in Tabs3 Billing or Tabs3 Trust Accounting (Trust), the following is required:

- The following software must be installed in order to use LawPay integration:
 - Tabs3 Billing (for payment links, electronic payment transactions, and electronic client funds deposit transactions).
 - Tabs3 Trust Accounting (Trust) (for electronic trust deposit transactions).
- An account must be created with LawPay. The email address and password for the LawPay account will be used to enable integration with Tabs3 Software.
- An internet connection is required.

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.

Accepting Credit Cards Using LawPay

Configuration

This section will walk you through the steps necessary to configure Tabs3 Billing and/or Tabs3 Trust Accounting (Trust) for electronic payment processing using LawPay.

Obtain a LawPay Account

In order to process electronic transactions in Tabs3 Software, the firm must first obtain an account with LawPay.

For more information regarding LawPay integration with Tabs3 Billing and Trust, please visit:

Tabs3.com/LawPay

This page can also be accessed by clicking the **Learn More** button on the **LawPay** tab of Tabs3 Billing or Trust Customization.

Configuring LawPay Integration with Tabs3 Billing

Once LawPay Integration has been enabled in Tabs3 Billing, you can process credit card and eCheck payments electronically as well as send payment links with your Email Statements.

To enable LawPay integration in Tabs3 Billing

- 1. Have all users exit the software.
- 2. In the Tabs3 Billing Quick Launch, search for and select "Customization."
- 3. Click the LawPay tab.
- 4. Click the Enable LawPay button.
- 5. A LawPay window will be displayed. Enter the email address and password assigned to your LawPay account and click the **Sign In** button.
- 6. If you are enabling LawPay for the first time, you will be prompted for a security code, which will be sent to the specified email address. Enter the security code and click **OK**.

- 7. Click the **Authorize** button to authorize Tabs3 Billing to connect to LawPay.
- 8. Click the 🗒 button to save customization changes.

🖁 Custor	nization						
Main	Other Systems	Options	Rates	Client Defaults	Tabs3Pay	LawPay	LexCharge
Tabs3 has the ability to use LawPay to process credit card and eCheck payments. To sign up or learn more about LawPay, click the Learn More button. Learn More Disable LawPay Allow for Payments Allow for Client Funds Deposits Image: Click the Learn but to be the process of the proceses of the proces of the process of the proce							
LawPa	y Bank Account:	Fir	st Bank			\sim	
Advar Timek	iced mode can be eeper or Client Lo	e used to o	configure tead of a	integration base single account t	ed on Prima used for the Switch	ry entire fir to Adva	m. nced Mode

Figure 1, LawPay tab of Tabs3 Billing Customization

By default, LawPay is configured to support payments, client funds deposits, and payment links for email statements. To disable one or more of these functions, clear the appropriate check boxes on the **LawPay** tab, then save and close the window.

The default configuration for LawPay integration is to deposit all funds received from electronic payments and client funds deposits to a single bank account associated with your LawPay account. If you have multiple bank accounts associated with your LawPay account, the first account will be selected by default. If you want to use a different account for all of your firm's LawPay transactions, you can select a different account in the **LawPay Bank Account** field. If you want to deposit LawPay transactions into separate bank accounts based on the client's assigned location or timekeeper, see the **Configuring Additional LawPay Accounts**

Configuring Additional LawPay Accounts in Tabs3 Billing

Tabs3 Billing automatically selects the first bank account associated with your LawPay account as the firm-level account. This account will be used for all LawPay payments and client funds deposits in Tabs3 Billing. If you want to deposit LawPay transactions into separate bank accounts based on location or timekeeper, you must configure additional accounts.

► To link a LawPay bank account to a location

- 1. Have all users exit the software.
- 2. In the Tabs3 Billing Quick Launch, search for and select "Customization."
- 3. Click the **LawPay** tab.
- 4. Click the **Add** button to open the LawPay Account Setup window. (*Note: If you do not see an Add button, click the Switch to Advanced Mode button.)*
 - a. If you want to use a bank account associated with a different LawPay Account, select that LawPay account in the LawPay Account field and proceed to step b. If the other LawPay account is not present, you will need to enable it using the following steps:
 - i. Click the Add new LawPay account link.
 - ii. A LawPay window will be displayed. Enter the email address and password assigned to the new LawPay account and click the **Sign In** button.
 - iii. Click the **Authorize** button to authorize Tabs3 Billing to connect to LawPay.
 - iv. You may be prompted for a security code, which will be sent to the specified email address. Enter the security code and click **OK**.
 - v. Click the **Authorize** button to authorize Tabs3 Billing to connect to LawPay.
 - b. In the **Use For** field, select **Location**. A Location Lookup window will be displayed. Select the location you want to associate with a LawPay bank account and click **OK**.
 - c. In the **Bank Account** field, select the LawPay bank account you want to link to the selected location.
 - d. Click **OK** to close the window.

LawPay Account Setup			? ×
LawPay Account Infor	mation		ОК
LawPay Account:	Tabs3 ~		Cancel
	Add new LawPay account		cuncer
Use For:	Location ~		
Location:	~		
Bank Account:	First Bank	\sim	

Figure 2, LawPay Account Setup Window (Location)

5. Save and close the Tabs3 Billing Customization window.

► To link a LawPay bank account to a timekeeper

- 1. Have all users exit the software.
- 2. In the Tabs3 Billing Quick Launch, search for and select "Customization."
- 3. Click the LawPay tab.
- 4. Click the **Add** button to open the LawPay Account Setup window. (*Note: If you do not see an Add button, click the Switch to Advanced Mode button.)*
 - a. If you want to use a bank account associated with a different LawPay Account, select that LawPay account in the LawPay Account field and proceed to step b. If the other LawPay account is not present, you will need to enable it using the following steps:
 - i. Click the Add new LawPay account link.
 - ii. A LawPay window will be displayed. Enter the email address and password assigned to the new LawPay account and click the **Sign In** button.
 - iii. Click the **Authorize** button to authorize Tabs3 Billing to connect to LawPay.
 - iv. You may be prompted for a security code, which will be sent to the specified email address. Enter the security code and click **OK**.
 - v. Click the **Authorize** button to authorize Tabs3 Billing to connect to LawPay.

- b. In the **Use For** field, select **Timekeeper**. A Timekeeper Lookup window will be displayed. Select the timekeeper you want to associate with a LawPay bank account and click **OK**.
- c. In the **Bank Account** field, select the LawPay bank account you want to link to the selected timekeeper.
- d. Click **OK** to close the window.

L	awPay Account Setup		? X
	LawPay Account Inform	ation	ОК
	LawPay Account:	Tabs3 ~	Cancel
		Add new LawPay account	cuncer
	Use For:	Timekeeper ~	
	Primary Timekeeper:	· ·	
	Bank Account:	First Bank \checkmark	

Figure 3, LawPay Account Setup Window (Timekeeper)

5. Save and close the Tabs3 Billing Customization window.

Configuring LawPay Integration in Trust

Once LawPay Integration has been enabled in Trust, you can process credit card trust deposits electronically.

To enable LawPay Integration in Trust

- 1. Have all users exit the software.
- 2. In the Trust Quick Launch, search for and select "Customization."
- 3. Click the **LawPay** tab.
- 4. Click the Enable LawPay button.
- 5. A LawPay window will be displayed.
 - a. Enter the email address and password assigned to your LawPay account and click the **Sign In** button. If you do not have a LawPay account, visit

Tabs3.com/LawPay for information on obtaining one.

- b. If you are enabling LawPay for the first time, you will be prompted for a security code, which will be sent to the specified email address. Enter the security code and click **OK**.
- c. Click the **Authorize** button to authorize Trust to connect to LawPay.
- 6. A LawPay Account Setup window will be displayed.
 - a. Select the Trust bank account you want to configure for electronic deposits in the **Bank Account** field.
 - b. In the **LawPay Bank Account** field, select the LawPay bank account you want to link to the selected trust bank account.
 - c. Click **OK** to close the LawPay Account Setup window.
- 7. Click the 🗄 button to save customization changes.

Configuring Additional LawPay Accounts

If you have multiple trust bank accounts configured in Trust, you must link them to LawPay bank accounts in order to process credit card deposits electronically using LawPay.

► To link a LawPay bank account to a trust bank account.

- 1. Have all users exit the software.
- 2. In the Trust Quick Launch, search for and select "Customization."
- 3. Click the LawPay tab.
- 4. Click the **Add** button to open the LawPay Account Setup window.
 - a. If you want to use a bank account associated with a different LawPay Account, select that LawPay account in the LawPay Account field and proceed to step b. If the other LawPay account is not present, you will need to enable it using the following steps:
 - i. Click the Add new LawPay account link.
 - ii. A LawPay window will be displayed. Enter the email address and password assigned to the new LawPay account and click the **Sign In** button.

- iii. Click the **Authorize** button to authorize Tabs3 Billing to connect to LawPay.
- iv. You may be prompted for a security code, which will be sent to the specified email address. Enter the security code and click **OK**.
- b. In the **Bank Account** field, select the trust bank account you want to associate with a LawPay bank account..
- c. In the **LawPay Bank Account** field, select the LawPay bank account you want to link to the selected trust bank account.
- d. Click **OK** to close the window.

LawPay Account Setup		? ×
LawPay Account Informa	ition	ОК
LawPay Account:	Tabs3 ~	Concol
	Add new LawPay account	Cancer
Bank Account:	· ·	
LawPay Bank Account:	First Bank \checkmark	

Figure 4, LawPay Account Setup Window (Trust)

5. Save and close the Trust Customization window.

Electronic Transactions

Integration with LawPay provides electronic processing of credit card and eCheck transactions for payments and client funds deposits in Tabs3 Billing as well as credit card transactions for trust account deposits in Tabs3 Trust Accounting (Trust).

Sending Payment Links with Email Statements

The easiest and most secure method to receive credit card and eCheck payments from LawPay is to include payment links with your Email Statements. These links are inserted into the email message that accompanies the statement, and open a LawPay payment page in the recipient's web browser.

Upon receipt of the email, clients can pay their statement directly via either credit card or eCheck. This eliminates the need for your firm to handle sensitive payment information, reducing your potential liability regarding fraudulent payments.

Once the client has made a payment using a payment link, it can be imported into Tabs3 Billing using the Import Online Payments utility. To access the Import Online Payments utility from the Quick Launch, search for and select "Import Online Payments."

				I	Invoid
Saved Payment Methods)				``
New Payment Method					,
Credit Card	O eChec	k			
Cardholder Name					
Credit Card				CVV	
Expiration Month	Expiration 2025	/ear	Ŧ	Zip Code	
Save for later use		Email	Address	for Receipt	
		Amou \$50:	unt To Pay 2.75		
				SUBMIT PAYMENT	
claimer	and subsequently	submittin	ig your ca	ard or other payment informat	tion to

Figure 5, LawPay Payment Page

LawPay payment links are valid for up to 90 days, and clients can make multiple partial payments using the same link until the full statement balance is paid.

For more information on configuring and importing payment links in Tabs3 Billing, see KB Article **R11767**, "Using the Tabs3 Payment Link."

Adding and Managing LawPay Payment Methods

Once LawPay integration has been configured, you can add payment methods for individual clients. Payment methods are linked to client contacts, which means that all matters that share the same client contact have access to any payment methods that have been added. Payment methods can be added from the Client Information, Payment Entry, and Client Funds Entry windows in Tabs3 Billing as well as the Trust Transaction Entry window in Trust.

To add a new LawPay Payment Method from the Client Information window in Tabs3 Billing

- 1. From the Quick Launch, search for and select "Client Information," and then select the client for whom a new payment method is being added.
- 2. Click the **LawPay** tab, and then click the **Manage LawPay Payment Methods** button.
- 3. Click the **New** button to open the Add LawPay Payment Method window.
- 4. Select Credit Card or eCheck.
- 5. Fill in the appropriate fields for the type of payment method you selected. See the <u>Credit Card Fields</u> section (*page 17*) or the <u>eCheck Fields</u> section (*page 18*) for information on the fields shown for each payment type. Alternatively, if the client is paying with a credit or debit card and you have a compatible card reader, click the **SWIPE CARD** link and swipe the card to automatically populate the fields.
- 6. Once you have finished entering the new payment method, click the **Continue** button.
- 7. Close the Manage LawPay Payment Methods window, and then close the Client Information window.

To add a new LawPay Payment Method from a transaction entry window in Tabs3 Billing or Trust

- 1. Open the transaction entry window for the type of transaction you want to create:
 - **Payment:** From the Tabs3 Billing Quick Launch, search for and select "Payment Entry."
 - **Client Funds:** From the Tabs3 Billing Quick Launch, search for and select "Client Funds Entry."
 - **Trust:** From the Trust Quick Launch, search for and select "Trust Transaction Entry."
- 2. Select the client for whom a payment or deposit is being made.
- Depending on whether the client has any existing payment methods, one of two links will be displayed to the right of the **Receipt Type** field (Payment) or below the **Type** field (Client Funds / Trust Transaction):
 - Click the **Add LawPay Payment Method** link to open the Add LawPay Payment Method window.
 - Click the **Manage LawPay Payment Methods** link and then click the **New** button to open the Add LawPay Payment Method window.
- 4. Select Credit Card or eCheck (Tabs3 Billing only).
- 5. Fill in the appropriate fields for the type of payment method you selected. See the <u>Credit Card Fields</u> section (*page 17*) or the <u>eCheck Fields</u> section (*page 18*) for information on the fields shown for each payment type. Alternatively, if the client is paying with a credit or debit card and you have a compatible card reader, click the **SWIPE CARD** link and swipe the card to automatically populate the fields.
- 6. Once you have finished entering the new payment method, click the **Continue** button to return to the transaction entry window.
- 7. The new payment method will be selected in the **Receipt Type** or **Type** field.

Credit Card Fields

Credit Card	O eCheck	c .	SWIPE CARD	
Cardholder Name				
Credit Card				
CVV				
Expiration Month 10	~	Expiration Year 2025		Ŧ
Zip Code				
Email Address				

Figure 6, LawPay Credit Card Entry

Note: If you have a compatible card reader, click the **SWIPE CARD** link to input the card information via the card reader. You must manually enter a value in the **CVV** and **Zip Code** fields. You must also fill in the **Email Address** field in order for the client to receive an emailed receipt from LawPay.

Cardholder Name	The name on the credit card.
Credit Card	The full credit card number. Do not enter dashes.
CVV	The three or four digit code typically found on the signature block on the back of the card.
Expiration Month	The month the card will expire in MM format.
Expiration Year	The year the card will expire in YYYY format.
Zip Code	The zip code of the billing address associated with the card.
Email Address	The email address where the client wants an optional automatic receipt to be emailed.

Note: The **Cardholder Name**, **Zip Code**, and **Email Address** fields are automatically populated based on the values present for the Client Contact in the Client or Trust Account file, but can be edited as needed. We recommend that you verify that the values for these fields are correct before proceeding.

eCheck Fields

	спеск	
Individual Acco	unt 🔘 Business Account	
First Name		
Lost Nama		
Last marrie		
Checking	Savings	
Checking	Savings	
Checking Account Number	Savings	

Figure 7, LawPay Credit Card Entry

Individual Account/ Business Account	Select whether the bank account is an individual or business bank account.
	Note: This option determines whether the First Name and Last Name or Business Name fields are displayed.
First Name	Enter the first name of the individual associated with the bank account.
Last Name	Enter the last name of the individual associated with the bank account.
	Note: The First Name and Last Name fields are only displayed if Individual Account is selected.

Business Name	Enter the name of the business associated with the bank account.
	Note: This field is only displayed if Business Account is selected.
Checking/Savings	Select the option to specify a Checking Account or Savings Account .
Account Number	The account number of the account, which must be 17 digits or less. The account number is typically shown to the right of the routing number on a check or deposit slip.
Routing Number	The routing number of the account, which must be 9 digits. The routing number is typically shown in the bottom left of a check or deposit slip.
Email Address	The email address where the client wants an optional automatic receipt to be emailed.

Note: The **First Name**, **Last Name**, **Business Name**, **Zip Code**, and **Email Address** fields are automatically populated based on the values present for the Client Contact in the Client file, but can be edited as needed. We recommend that you verify that the values for these fields are correct before proceeding.

Tabs3 Billing Payment

When LawPay integration is enabled, payments entered with a LawPay payment method selected in the **Receipt Type** field will automatically initiate an electronic transaction when saved.

► To process a payment using a credit card or eCheck

- 1. From the Quick Launch, search for and select "Payment Entry."
- 2. Enter the payment as you normally would.
- 3. Select an existing LawPay payment method in the **Receipt Type** field, or <u>add a new</u> <u>payment method</u> (*page 16*).

당 Payment Enti	у		1
	🔤 💼 🚥		
Client ID:	121.01 Phillips/Marc Real Estate A	us cquisition	
Reference:	1 Vew Monthly	Source: Billing	
Date:	08/22/2024 V Monday	Primary: 1 Robert J. Burn:	5
Tcode:	900 V PYM Regular Payment	Receipt Type: Visa - 4242	 Manage LawPay Payment Methods
Statement #:	~	Check #: 0	
Amount:	250.00	Ref./Memo: 121.01	
Description:	Payment		^

Figure 8, Tabs3 Billing Payment Entry

 Press Ctrl+S to save the transaction. Click Yes to confirm that you want to process the payment electronically. (Clicking No will return to the Payment Entry window without saving the payment.)

Tabs3 Billing Client Funds Deposit

When LawPay integration is enabled, client funds transactions entered with a LawPay payment method selected in the **Type** field will automatically initiate an electronic transaction when saved.

> To process a client funds deposit using a credit card or eCheck

- 1. From the Quick Launch, search for and select "Client Funds Entry."
- 2. Enter the deposit as you normally would.
- Select an existing LawPay payment method in the Type field, or <u>add a new</u> payment method (page 16).

당 Client Funds	Entry					
	F					
Client ID:	121.01	v Pl	nillips/Marcus			
		R	eal Estate Acqui	sition		
Reference:	1 ~	New	Monthly	Primary:	1 Robert J. Burn	s
Date:	08/22/2024 ~	Monday	_	Status:	P - Print	\sim
Type:	Visa - 4242	~		Fund Application:		~
	Manage LawPay P	ayment Method	ds	Amount:	250.00	
Tcode:	1 Y FEE	Normal Fee				
Description:	Deposit					
		-				

Figure 9, Tabs3 Billing Client Funds Entry

4. Press Ctrl+S to save the deposit. Click **Yes** to confirm that you want to process the deposit electronically. (Clicking **No** will return to the Client Funds Entry window without saving the deposit.)

Trust Deposit

When LawPay integration is enabled, trust transactions entered with a LawPay payment method selected in the **Type** field will automatically initiate an electronic transaction when saved.

> To process a trust deposit using a credit card

- 1. From the Quick Launch, search for and select "Trust Transaction Entry."
- 2. Enter the deposit as you normally would.
- 3. Select an existing LawPay payment method in the **Type** field, or **add a new payment method** (*page 16*).

Trust Transa	tion Entry		
Transaction	Tabs3		
Trust ID:	121.01	 Phillips/Marcus Real Estate Acquisition 	
Bank #:	1 V Trust		
Reference:	1 × New		
Type:	Visa - 4242 ~	Chec #: 0	
	Manage LawPay Payment	Methods	
Date:	08/22/2024 ~	Amount:	250.00
Description		A Balance:	250.00

Figure 10, Trust Trust Transaction Entry

 Press Ctrl+S to save the transaction. Click Yes to confirm that you want to process the deposit electronically. (Clicking No will return to the Trust Transaction Entry window without saving the deposit.)

Error Messages & Troubleshooting

Detailed information regarding error messages or rejections when a transaction is submitted to LawPay can be found in our Knowledge Base at:

support.Tabs3.com

Article **<u>R11827</u>**, "LawPay Error Messages and Troubleshooting," provides information and troubleshooting steps for messages related to credit card processing. Tabs3 Software does not provide support for credit card rejections.

If you need assistance with correcting errors, please contact LawPay Support by phone at 800-459-5798, by email at <u>support@lawpay.com</u>, or via chat at <u>www.lawpay.com/support</u>.

Credit and Void Transactions

In the event you need to delete or adjust a transaction, Tabs3 Billing and Trust will automatically attempt to issue a credit or void through LawPay for the associated credit card or eCheck charge.

Issuing a Credit/Void in Tabs3 Billing

LawPay payments or client funds deposits that are deleted or adjusted in Tabs3 Billing can attempt to void or credit the associated transactions in the LawPay system. The Payment Adjustment window is used to reverse or refund the payment in Tabs3 Billing.

Credit/Void a Work-in-Process LawPay Payment Transaction

- 1. In the Quick Launch, search for and select "Payment Entry."
- 2. Select the payment transaction associated with the LawPay transaction. (Note that only work-in-process payments are available to be credited/voided in this manner.)
- 3. Click the Solution to delete the payment transaction. You will be prompted to confirm that you want to reverse the LawPay transaction. Click **Yes** to proceed.



Figure 11, Deleting a Payment Entry

Credit/Void an Archived Credit Card Payment Transaction

- 1. In the Quick Launch, search for and select "Payment Adjustment."
- 2. Select the payment transaction associated with the LawPay transaction.
- 3. Select **Reversal** (crediting/voiding the entire amount of the payment) or **Refund** (crediting/voiding an unallocated portion of the payment).
- 4. Select a **Date of Adjustment** and **Adjustment Amount** (refund only) for the Tabs3 Billing payment. (Note that this date is not used for the date of the credit on LawPay. The current system date is used.)
- 5. Click **OK** to perform the adjustment/credit. You will be prompted to confirm that you want to reverse the LawPay transaction. Click **Yes** to proceed.

🔁 Payment Adjustment	
Client ID: 121.01 V Phillips/Ma Real Estate	rcus Acquisition
Reference: 1 v Regular Payment	
Payment Information	
Payment Date: LawPay Transaction Authorization	×
Receipt Type:	
Payment Amount: A LawPay transaction exists for attempt to reverse the transact	r this payment. Tabs3 will tion.
Are you sure you want to reve	rse the LawPay transaction?
Adjustment Inforn	
Adjustment Type: Yes	No Cancel
Reversal	
O Refund Adjustm	ent Amount: 250.00
OK Canc	el

Figure 12, Tabs3 Billing Payment Adjustment

Credit/Void a LawPay Client Funds Deposit

- 1. In the Quick Launch, search for and select "Client Funds Entry."
- 2. Select the client funds transaction associated with the credit card transaction. (Note that only work-in-process client funds transactions are available to be credited/voided in this manner.)

3. Click the Substitution to delete the client funds transaction. You will be prompted to confirm that you want to reverse the LawPay transaction. Click **Yes** to delete the transaction and reverse the LawPay transaction. Click **No** to delete the transaction without reversing the LawPay transaction. Click **Cancel** to return to the Client Funds Entry window without deleting the transaction.



Figure 13, Deleting a Client Funds Deposit

Issuing a Credit/Void in Trust

LawPay trust deposits that are deleted in Trust can attempt to void or credit the associated transactions in the LawPay system.

Credit/Void a LawPay Trust Deposit

- 1. In the Quick Launch, search for and select "Trust Transaction Entry."
- 2. Select the trust transaction associated with the LawPay transaction.
- 3. Click the Solution to delete the trust transaction. You will be prompted to confirm that you want to reverse the LawPay transaction. Click **Yes** to proceed.



Figure 14, Deleting a Trust Deposit

Voids vs. Credits

Tabs3 Billing attempts to void a credit card transaction first. Normally, a void can only be processed the same business day. If a credit card transaction is voided, the transaction will appear on LawPay reports with a zero amount; however, the Tabs3 Billing Credit Card Authorization List will show the original transaction (with the original amount) and the void transaction (with a negative amount).

If a credit card transaction cannot be voided, Tabs3 Billing will then attempt to credit the transaction. Credit card transactions can normally be credited for up to 180 days on the LawPay system. After that time, Tabs3 Billing may not be able to process the transaction, and an error will be displayed. In this case, the transaction will not be adjusted, and manual adjustments may be required. After this time, it is recommended that a check is processed for the credit, either manually or using Tabs3 Accounts Payable (AP).

One important difference between voids and credits is that voids always reverse the entire amount of the transaction, whereas a credit can be for any portion of the original transaction. This is generally not a concern as credits for a portion of the transaction only occur when issuing a refund in Tabs3 Billing, which typically occurs after the window for issuing a void has passed. However, if a refund is processed in Tabs3 Billing and a void is

issued by LawPay, a message will be displayed after the void is processed (*Figure 15*), and it will be necessary to reverse the original payment entirely and reenter the payment with the correct amount.



Figure 15, Tabs3 Billing payment adjustment message

Credit Card Reports

The credit card receipts and Credit Card Authorization List report can be accessed via Tabs3 Billing or Trust.

Credit Card Transaction Receipts

B 410: 00/2 // 202 /	Payment Receipt	Page:
Client:	4.00 Smith/John	
Statement #	0 Received By:	DA
Receipt Type:	MC-5454 Date:	08/21/202
Reference:	23 Time:	04:11 PI
Description:	Payment	
Cardholder Name:	John Smith Amount (USD):	60.0
Signature:		
Menu:	File Data Entry Payment 🔤 Print Receipt	
Home:	All Actions Transactions Data Entry Payment Entry	Print Receipt
Quick Launch:	Payment Entry 🔤 Print Receipt	
Date: 08/21/2024	Credit Card Deposit Receipt	Page:
		0
Client:	4.00 Smith/John	Ū
Client: Receipt Type:	4.00 Smith/John MC-5454 Received By:	DA
Client: Receipt Type: Reference:	4.00 Smith/John MC-5454 Received By: 2 Date:	DA 08/21/202
Client: Receipt Type: Reference:	4.00 Smith/John MC-5454 Received By: 2 Date: Time:	DA 08/21/202 04:11 Pi
Client: Receipt Type: Reference: Description:	4.00 Smith/John MC-5454 Received By: 2 Date: Time: Payment	DA 08/21/202 04:11 PI
Client: Receipt Type: Reference: Description: Cardholder Name:	4.00 Smith/John MC-5454 Received By: 2 Date: Time: Payment John Smith Amount (USD):	DA 08/21/202 04:11 Pl
Client: Receipt Type: Reference: Description: Cardholder Name: Reference #:	4.00 Smith/John MC-5454 Received By: 2 Date: Time: Payment John Smith Amount (USD): 1789245	DA 08/21/202 04:11 PI 100.0
Client: Receipt Type: Reference: Description: Cardholder Name: Reference #: Signature:	4.00 Smith/John MC-5454 Received By: 2 Date: Time: Payment John Smith Amount (USD): 1789245	DA 08/21/202 04:11 Pl 100.0
Client: Receipt Type: Reference: Description: Cardholder Name: Reference #: Signature: Menu:	4.00 Smith/John MC-5454 Received By: Date: Time: Payment John Smith Amount (USD): 1789245 File Data Entry Client Funds Print Receipt	DA 08/21/202 04:11 Pi 100.0
Client: Receipt Type: Reference: Description: Cardholder Name: Reference #: Signature: Menu: Home:	4.00 Smith/John MC-5454 Payment Date: Time: Payment John Smith Amount (USD): 1789245 File Data Entry Client Funds I Print Receipt All Actions Transactions Data Entry Client Funds Entry	DA 08/21/202 04:11 Pl 100.0

Date: 08/21/2024	Trust Credit Card Deposit	Receipt	Page: 1	
Trust ID:	4.00-01 Smith/John			
Receipt Type: Reference:	EC-0089 1	Received By: Date: Time:	DAN 08/21/2024 04:11 PM	
Description:	Payment			
Reference #:	1789245	Amount (USD):	250.00	
Signature:				
Menu:	File Open Transaction 🔜 Print R	eceipt		
Home:	All Actions Checks/Deposits Trust Transaction Entry 🔜 Print Receipt			

Quick Launch: Trust Transaction Entry | 🔤 | Print Receipt

The Credit Card Receipt displays the amount and general information about the credit card transaction, including the card type and last four digits of the credit card number. No secure credit card information is shown on this receipt. A copy of the receipt may be presented to the client as proof of payment.

Definitions

Date	Date the receipt was printed.
Client/Trust ID	Client ID (Tabs3 Billing) or Trust Account ID and Bank Account (Trust), Name, and Work Description.
	Note: Deleting a client or trust account does not delete any transaction records processed by Tabs3 Billing or Trust. The Credit Card Authorization List <i>(page 31)</i> will report the original Client ID or Trust ID, and note that the client or trust account was deleted.
Statement # (Payment Only)	Statement number the payment applies to, if selected.
Receipt Type	The card type followed by the last four digits of the account number.

	• VS - Visa
	MC - Mastercard
	• DS - Discover
	AE - American Express
	• EC - eCheck
Reference	The reference number assigned to the transaction in Tabs3 Billing or Trust.
Received By	The user who processed the transaction.
	Note: For transactions that were created via the Import Online Payments window, the User ID shown is that of the user who initiated the import (either by being the first person to open Tabs3 Billing that day, or by opening the Import Online Payments window).
Date	Date of the payment, client funds deposit, or trust transaction.
Time	Time of the payment, client funds deposit, or trust transaction.
Description	Description of the payment, client funds deposit, or trust transaction.
Cardholder Name	The name of the cardholder as it was entered on the Add Card page of the Credit Card Authorization window (or read by the card reader, if used). This field defaults to the Contact Name assigned to the client in the Client Contact , if it is not overwritten by the user or the card reader.
Reference #	LawPay or LexCharge reference number.
Amount (USD)	Amount charged to the credit card.

Credit Card Authorization List

Date: 08/21/2024	ļ.		Tabs3 Credit Card Authorizat	ion List		Page: 1
From:08/21/2024	Thru 08/21/2024					
Auth	Client ID	Ref #	Card Info Type		Amount	lisor IF
Merchant ID: Fir	m Account	Net #			Amount	030110
08/21/2024	4.00	1824142	MC-5454 Charge		250.00	DAN
08/21/2024	235.07	1945910	VS-6791 Charge		175.00	DAN
Total for Merchar	nt ID: Firm Accour	ıt		Charges	425.00	
				Total	425.00	
Merchant ID: On	naha Account					
08/21/2024	848.73	1792030	MC-8934 Charge		120.00	MARY
08/21/2024	529.05	2312311	DS-7645 Credit		-35.00	MARY
08/21/2024	451.74	2401923	VS-3659 Charge		375.00	MARY
Total for Merchar	nt ID: Omaha Acc	ount		Charges	495.00	
				Credits	-35.00	
				Total	460.00	
			Grand Totals			
				Charges	920.00	
				Credits	-35.00	
				Total	885.00	

Date: 08/21/2	024				Tabs3 C	redit Card Authorization	n List				Page: 1
From:12/01/2023	Thru 12/01/2024	l .									
Auth Date	Time	Client ID	Trans Status	Source	Ref #	Merchant ID	Card Info	Cardholder Name	Туре	Amount	User ID
Merchant ID	Firm Acco	unt							71		
08/21/2024	10:28 AM	4.00	WIP	Pymt	1824142	12abcde3-4567-fgh8-9123	MC-5454	Leonard A Brown	Charge	250.00	DAN
08/21/2024	01:34 PM	245.07	WIP	Pymt	1945910	12abcde3-4567-fgh8-9123	VS-6791	Nancy Garcia	Charge	175.00	DAN
Total for Mer	chant ID:Fi	rm Accoun	ıt						Charges	425.00	
									Total	425.00	
Merchant ID	: Omaha Ao	count									
08/21/2024	9:37 AM	848.73	WIP	Fund	1792030	12abcde3-4567-fgh8-9123	MC-8934	David R Williams	Charge	120.00	MARY
08/21/2024	10:45 AM	529.05	Arch	Pymt	2312311	12abcde3-4567-fgh8-9123	DS-7645	Martin JAlexander	Credit	-35.00	MARY
08/21/2024	2:15 PM	451.74	WIP	Pymt	2401923	12abcde3-4567-fgh8-9123	VS3659	Sally L Lawson	Charge	375.00	MARY
Total for Merc	hant ID: Om	aha Account	t						Charges	495/00	
									Credits	-35.00	
									Total	460.00	
						Grand Totals					
						c			Charges	920.00	
									Credits	-35.00	
									Total	685.00	

Date: 08/21/2024			Trust Credit Card Authorization List				
From:08/21/2024	4 Thru 08/21/2024						
Auth Date	Ref #	Card Info	Туре		Amount	User ID	
Merchant ID: Fi	st Bank IOLTA						
08/21/2024	193998	MC-2147	Charge		250.00	DAN	
08/21/2024	211665	VS-4711	Charge		250.00	DAN	
08/21/2024	584773	DS-2614	Charge		100.00	DAN	
08/21/2024	584773	DS-2614	Void		-100.00	DAN	
Total for Mercha	nt ID: First Bank IO	LTA		Charges	600.00		
				Voids	-100.00		
				Total	500.00		
				Grand Totals			
				Charges	600.00		
				Credits	-100.00		
				Total	500.00		

Menu: Reports | Credit Card | Credit Card Authorization List Home: All Actions | Reports | Credit Card | Credit Card Authorization List Quick Launch: Credit Card Authorization List

The Credit Card Authorization List is used to print a list of credit card transactions authorized via Tabs3 Billing or Trust for a specified time period. You can run a list with charges, voids, credits, or any combination thereof. Items are sorted based on the specified **1st Sort Order** and **2nd Sort Order**. Three reports are shown. The first report includes the default columns, whereas the second report includes all possible columns. The third report is the Trust Credit Card Authorization List with the default columns.

Definitions

Date	The date the report was printed.
From/Thru	The beginning and ending dates selected for the report.
Merchant ID	The Merchant ID with which the transaction was processed is printed if the report is printed in Merchant ID sort order. The Merchant ID is the default sort order.

(Client/Trust ID)	The Client/Trust ID and Client Name for which the transaction was processed is printed if the report is printed in Client/Trust ID sort order. If a credit card transaction exists for a client/trust account that was deleted, that transaction is retained and will print under the original Client/Trust ID and the Client Name "(Client/Trust Account Deleted)".
Trans Status	Status field of the transaction. (Deleted, Processed/WIP, or ARCH)
Auth Date	The date the credit card transaction was authorized.
Time	The time the credit card transaction was authorized.
Client/Trust ID	Client or Trust Account for which the transaction was processed.
Source (Tabs3 Billing only)	The data entry window where the credit card transaction was entered. (Pymt or Fund)
Ref#	The the reference number generated by the LawPay or LexCharge processing system.
Merchant ID	The Merchant ID the credit card transaction was processed with.
Card Info	A two digit card type code (VS-Visa, MC-Mastercard, DS-Discover, AE-American Express, EC-eCheck) followed by the last four digits of the account number.
Cardholder Name	The name of the cardholder as it was entered on the Add Card page of the Credit Card Authorization window (or read by the card reader, if used). This field defaults to the Contact Name assigned to the client in the Client Contact , if it is not overwritten by the user or the card reader.
Туре	Transaction type. Charge, Credit, or Void.
Amount	The amount of the credit card transaction.

User ID

The user who processed the transaction.

Note: For transactions that were created via the Import Online Payments window, the User ID shown is that of the user who initiated the import (either by being the first person to open Tabs3 Billing that day, or by opening the Import Online Payments window).

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