

# LawPay Integration Guide



Tabs3 Billing



PracticeMaster



Trust Accounting



Accounts Payable




General Ledger

## 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 [Credit Card Transaction Receipt](#) (page 28) as needed. A [Credit Card Authorization List](#) (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](https://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](https://www.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.

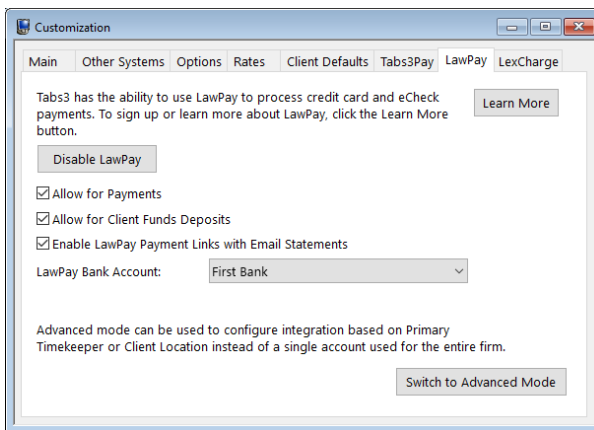


Figure 1, **LawPay** tab of Tabs3 Billing Customization

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](#) section (page 8).

## **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.

The image shows a software window titled "LawPay Account Setup". It contains a section titled "LawPay Account Information" with four fields: "LawPay Account:" with a dropdown menu showing "Tabs3", "Use For:" with a dropdown menu showing "Location", "Location:" with an empty text box, and "Bank Account:" with a dropdown menu showing "First Bank". A blue link "Add new LawPay account" is positioned between the "LawPay Account:" and "Use For:" fields. To the right of the form are "OK" and "Cancel" buttons. The window has standard OS controls (minimize, maximize, close) in the top right corner.

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.

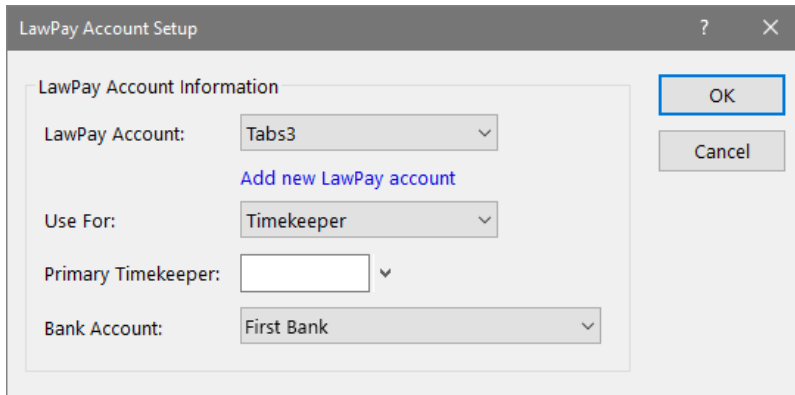


Figure 3, LawPay Account Setup Window (Timekeeper)

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](https://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.

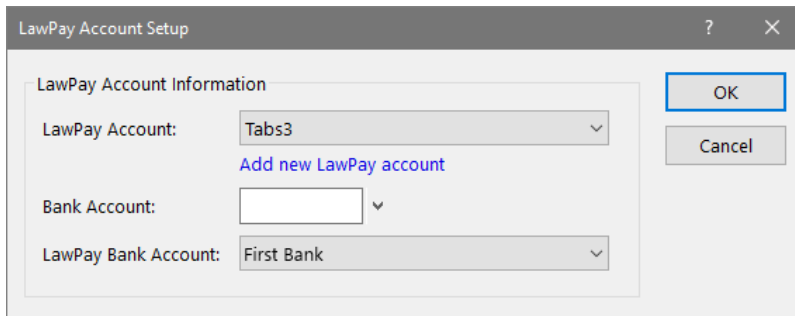
## ***Configuring Additional LawPay Accounts***

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.



*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."

**Dave Smith**
**Amount Due: \$502.75**

Invoice # 2

Saved Payment Methods

New Payment Method

☒ Credit Card
 ☐ eCheck

Cardholder Name

Credit Card

CVV

Expiration Month

Expiration Year

Zip Code

10

2025

☐ Save for later use

Email Address for Receipt


Amount To Pay

\$502.75

SUBMIT PAYMENT

**Disclaimer**

By clicking "Submit Payment" above and subsequently submitting your card or other payment information to us, you agree to pay the amount specified for the invoice, and authorize us to charge your designated payment method for such Payment Amount.



POWERED BY  
**LAWPAY**

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

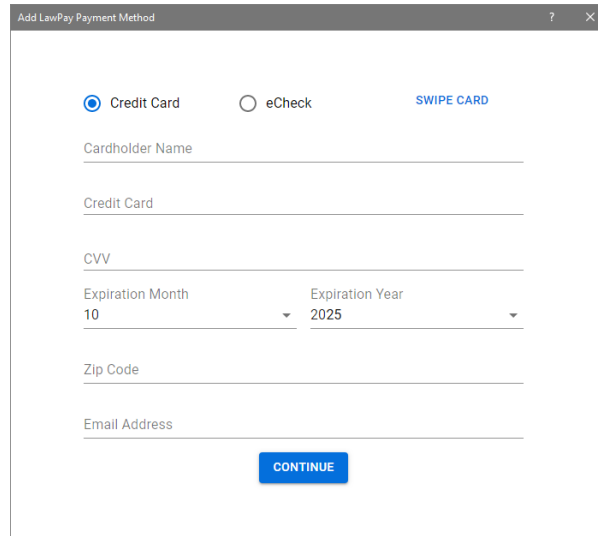
1. From the Quick Launch, search for and select "Client Information," and then select the client for whom a new payment method is being added.
2. Click the **LawPay** tab, and then click the **Manage LawPay Payment Methods** button.
3. Click the **New** button to open the Add LawPay Payment Method window.
4. Select **Credit Card** or **eCheck**.
5. Fill in the appropriate fields for the type of payment method you selected. See the [Credit Card Fields](#) section (page 17) or the [eCheck Fields](#) 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.
3. 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 [Credit Card Fields](#) section (page 17) or the [eCheck Fields](#) 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



The screenshot shows a web form titled "Add LawPay Payment Method" with a close button (X) and a help button (?). The form has two radio buttons: "Credit Card" (selected) and "eCheck". A link "SWIPE CARD" is visible. Below the radio buttons are input fields for "Cardholder Name", "Credit Card", "CVV", "Expiration Month" (dropdown menu showing "10"), "Expiration Year" (dropdown menu showing "2025"), "Zip Code", and "Email Address". A blue "CONTINUE" button is at the bottom.

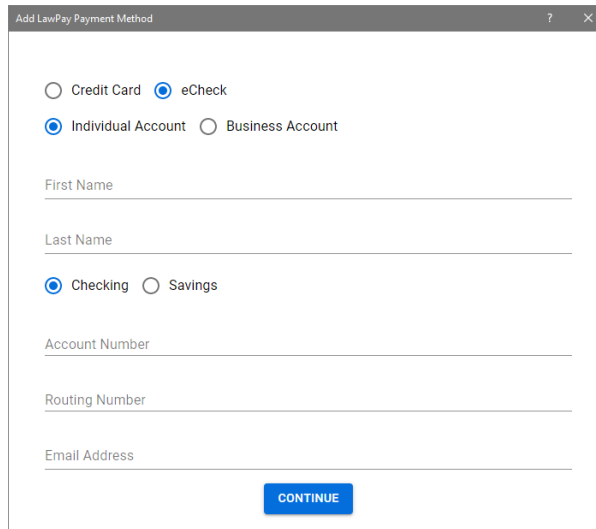
Figure 6, LawPay Credit Card Entry

**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.

<b>Cardholder Name</b>	The name on the credit card.
<b>Credit Card</b>	The full credit card number. Do not enter dashes.
<b>CVV</b>	The three or four digit code typically found on the signature block on the back of the card.
<b>Expiration Month</b>	The month the card will expire in MM format.
<b>Expiration Year</b>	The year the card will expire in YYYY format.
<b>Zip Code</b>	The zip code of the billing address associated with the card.
<b>Email Address</b>	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



The screenshot shows a dialog box titled "Add LawPay Payment Method" with a close button (X) and a help button (?). Inside the dialog, there are two rows of radio buttons. The first row has "Credit Card" (unselected) and "eCheck" (selected). The second row has "Individual Account" (selected) and "Business Account" (unselected). Below these are text input fields for "First Name", "Last Name", "Account Number", "Routing Number", and "Email Address". The "Checking" radio button is selected under the "Individual Account" section. A blue "CONTINUE" button is at the bottom right.

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 [add a new payment method](#) (page 16).

Payment Entry

Client ID: 121.01 Phillips/Marcus  
Real Estate Acquisition

Reference: 1 New Monthly Source: Billing

Date: 08/22/2024 Monday Primary: 1 Robert J. Burns

Tcode: 900 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

4. 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.
3. Select an existing LawPay payment method in the **Type** field, or [add a new payment method](#) (page 16).

Client Funds Entry

Client ID: 121.01 Phillips/Marcus  
Real Estate Acquisition

Reference: 1 New Monthly Primary: 1 Robert J. Burns

Date: 08/22/2024 Monday Status: P - Print

Type: Visa - 4242 Manage LawPay Payment Methods

Fund Application: Amount: 250.00

Tcode: 1 FEE Normal Fee

Description: Deposit

Figure 9, Tabs3 Billing Client Funds Entry

- 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

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

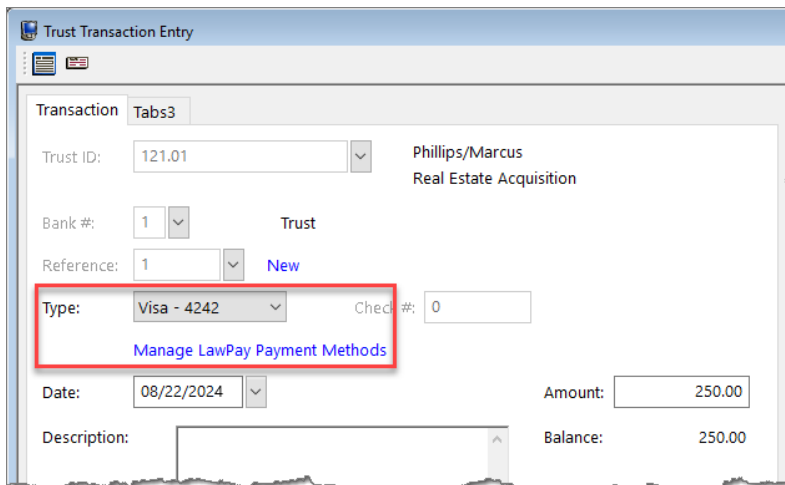
The screenshot shows the 'Trust Transaction Entry' window. The 'Transaction' tab is active. The 'Trust ID' is 121.01, and the 'Trust' is Phillips/Marcus Real Estate Acquisition. The 'Bank #' is 1. The 'Reference' is 1, with a 'New' link next to it. The 'Type' field is set to 'Visa - 4242', which is highlighted with a red box. Below the 'Type' field is a link that says 'Manage LawPay Payment Methods'. The 'Check #' is 0. The 'Date' is 08/22/2024. The 'Amount' is 250.00, and the 'Balance' is 250.00. The 'Description' field is empty.

Figure 10, 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](https://support.Tabs3.com)

Article [R11827](#), "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 [support@lawpay.com](mailto:support@lawpay.com), or via chat at [www.lawpay.com/support](https://www.lawpay.com/support).


## 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  button to delete the payment transaction. You will be prompted to confirm that you want to reverse the LawPay transaction. Click **Yes** to proceed.

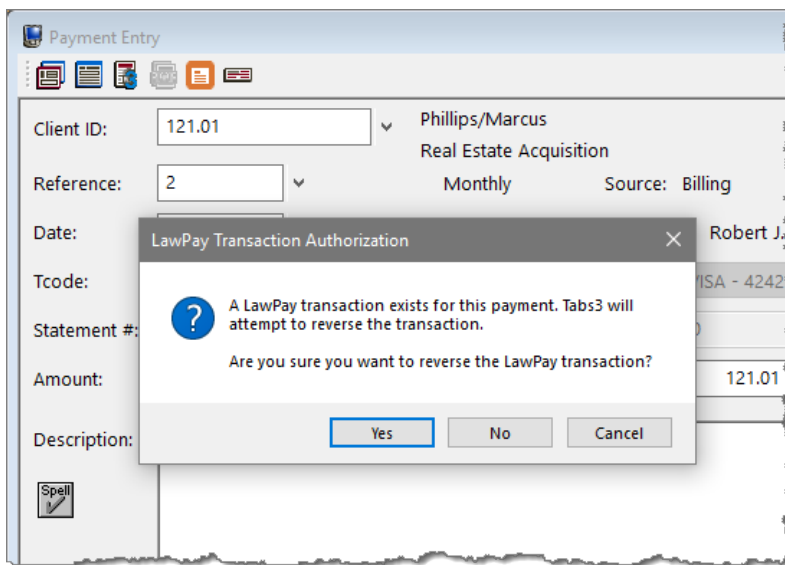


Figure 11, Deleting a Payment Entry

### ► 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.

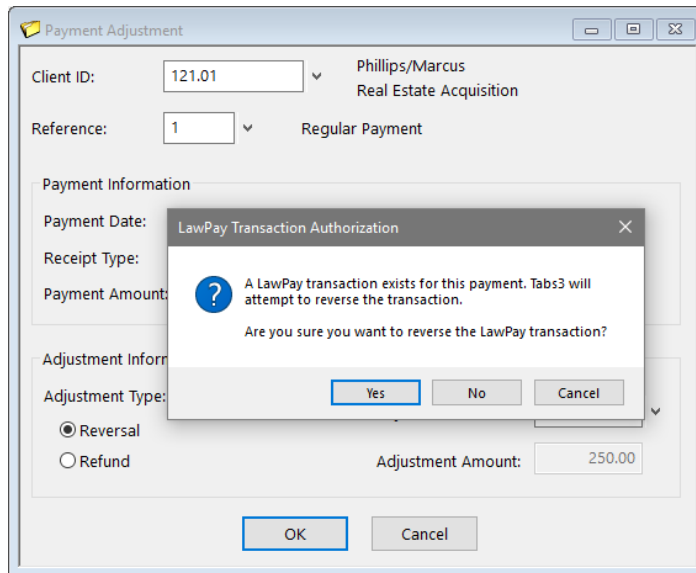



Figure 12, Tabs3 Billing Payment Adjustment

### ► 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.)*



- Click the  button 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.

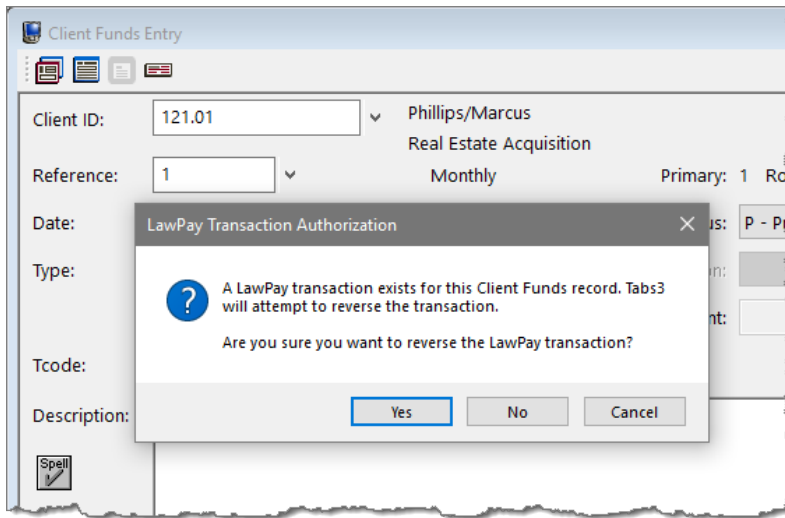



Figure 13, Deleting a Client Funds Deposit

## 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

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

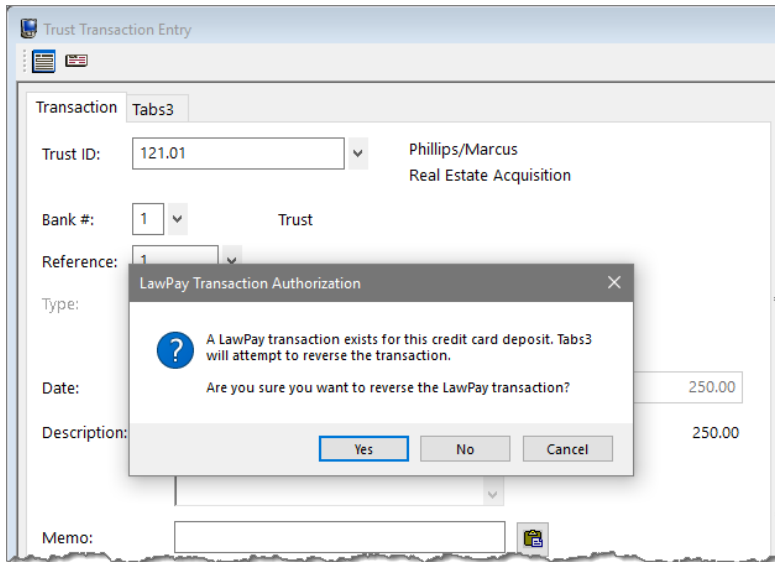


Figure 14, Deleting a Trust Deposit

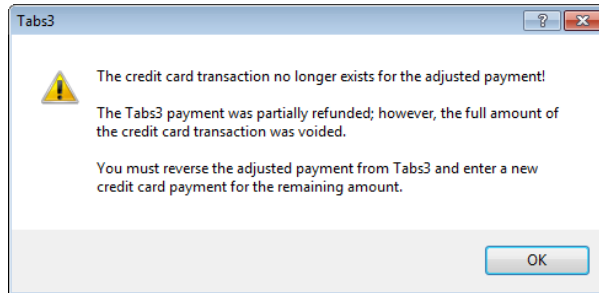
## Voids vs. Credits

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

Date: 08/21/2024	<b>Payment Receipt</b>		Page: 1
Client:	4.00 Smith/John		
Statement #	0	Received By:	DAN
Receipt Type:	MC-5454	Date:	08/21/2024
Reference:	23	Time:	04:11 PM
Description:	Payment		
Cardholder Name:	John Smith	Amount (USD):	60.00
Reference #:	1789245		
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	<b>Credit Card Deposit Receipt</b>		Page: 1
Client:	4.00 Smith/John		
Receipt Type:	MC-5454	Received By:	DAN
Reference:	2	Date:	08/21/2024
		Time:	04:11 PM
Description:	Payment		
Cardholder Name:	John Smith	Amount (USD):	100.00
Reference #:	1789245		
Signature:	_____		

**Menu:** [File](#) | [Data Entry](#) | [Client Funds](#) |  | [Print Receipt](#)

**Home:** [All Actions](#) | [Transactions](#) | [Data Entry](#) | [Client Funds Entry](#) |  | [Print Receipt](#)

**Quick Launch:** [Client Funds Entry](#) |  | [Print Receipt](#)

Date: 08/21/2024	<b>Trust Credit Card Deposit Receipt</b>		Page: 1
Trust ID:	4.00-01 Smith/John		
Receipt Type:	EC-0089	Received By:	DAN
Reference:	1	Date:	08/21/2024
		Time:	04:11 PM
Description:	Payment		
Reference #:	1789245	Amount (USD):	<b>250.00</b>
Signature:	_____		

**Menu:** [File](#) | [Open](#) | [Transaction](#) |  | [Print Receipt](#)

**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 (*page 31*) 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		Tabs3 Credit Card Authorization List					Page: 1
From:08/21/2024 Thru 08/21/2024							
Auth Date	Client ID	Ref #	Card Info	Type	Amount	User ID	
<b>Merchant ID: Firm Account</b>							
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 Merchant ID: Firm Account					Charges	425.00	
					Total	425.00	
<b>Merchant ID: Omaha Account</b>							
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 Merchant ID: Omaha Account					Charges	495.00	
					Credits	-35.00	
					Total	460.00	
<b>Grand Totals</b>							
					Charges	920.00	
					Credits	-35.00	
					Total	885.00	

Date: 08/21/2024

Tabs3 Credit Card Authorization List

Page: 1

From:12/01/2023 Thru 12/01/2024

Auth Date	Time	Client ID	Trans Status	Source	Ref #	Merchant ID	Card Info	Cardholder Name	Type	Amount	User ID
Merchant ID: Firm Account											
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 Merchant ID:Firm Account									Charges	425.00	
									Total	425.00	

Merchant ID: Omaha Account											
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 J Alexander	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
Totalfor Merchant ID: Omaha Account									Charges	495.00	
									Credits	-35.00	
									Total	460.00	

Grand Totals											
									Charges	920.00	
									Credits	-35.00	
									Total	685.00	

Date: 08/21/2024		<b>Trust Credit Card Authorization List</b>			Page: 1
From: 08/21/2024 Thru 08/21/2024					
Auth Date	Ref #	Card Info	Type	Amount	User ID
<b>Merchant ID: First Bank IOLTA</b>					
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 Merchant ID: First Bank IOLTA				Charges	600.00
				Voids	-100.00
				Total	500.00
<b>Grand Totals</b>					
				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

<b>Date</b>	The date the report was printed.
<b>From/Thru</b>	The beginning and ending dates selected for the report.
<b>Merchant ID</b>	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.



<b>(Client/Trust ID)</b>	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)".
<b>Trans Status</b>	Status field of the transaction. (Deleted, Processed/WIP, or ARCH)
<b>Auth Date</b>	The date the credit card transaction was authorized.
<b>Time</b>	The time the credit card transaction was authorized.
<b>Client/Trust ID</b>	Client or Trust Account for which the transaction was processed.
<b>Source (Tabs3 Billing only)</b>	The data entry window where the credit card transaction was entered. (Pymt or Fund)
<b>Ref#</b>	The the reference number generated by the LawPay or LexCharge processing system.
<b>Merchant ID</b>	The Merchant ID the credit card transaction was processed with.
<b>Card Info</b>	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.
<b>Cardholder Name</b>	The name of the cardholder as it was entered on the <b>Add Card</b> page of the Credit Card Authorization window (or read by the card reader, if used). This field defaults to the <b>Contact Name</b> assigned to the client in the <b>Client Contact</b> , if it is not overwritten by the user or the card reader.
<b>Type</b>	Transaction type. Charge, Credit, or Void.
<b>Amount</b>	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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