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PracticeMaster

Matter Manager Quick Guide

Tabs3 Billing

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PracticeMaster Matter Manager Quick Guide

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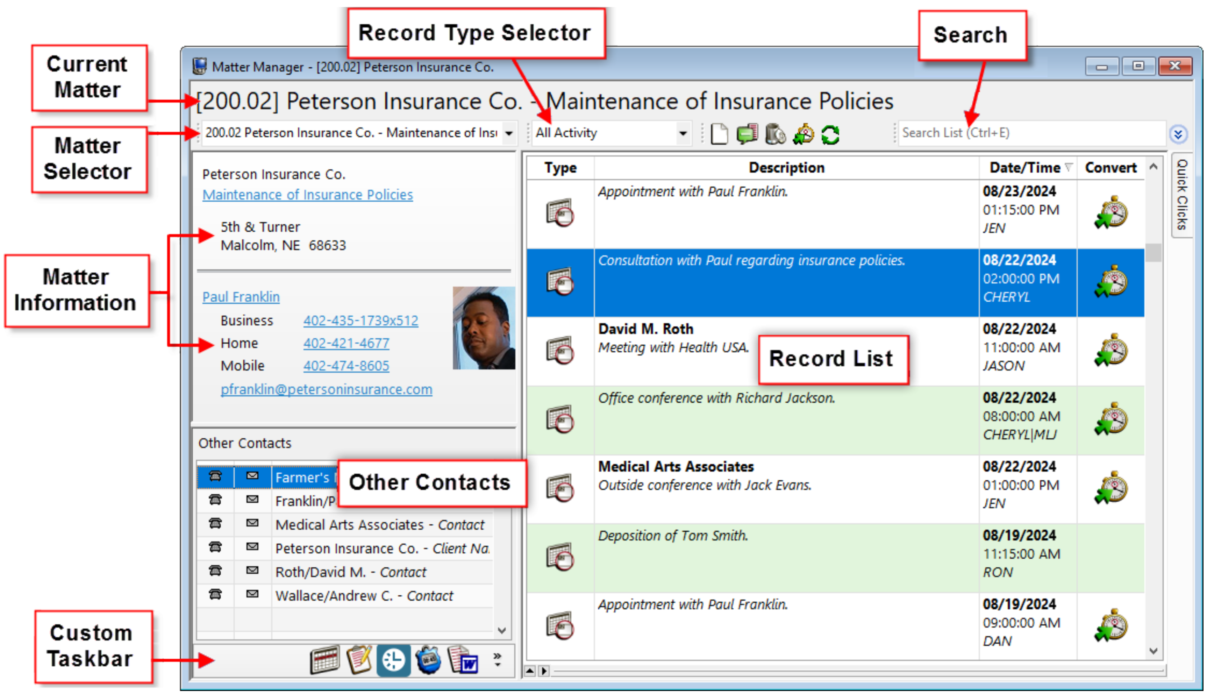
Quick Guide to Matter Manager in PracticeMaster

PracticeMaster's Matter Manager is a convenient way to view detailed information on individual client matters and launch commonly used features from within one window. This guide will provide you with all the information you need to begin using the Matter Manager.

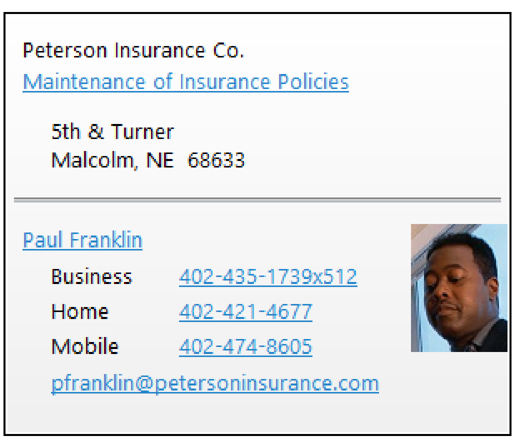
Getting Started

In the Quick Launch, search for and select "Matter Manager." This will open the Matter Manager window. A drop-down menu below the selected matter information allows you to switch between recently selected matters and includes an option to view all matters in the Client file. The standard toolbar buttons and Quick Clicks pane are also available.



Matter Manager Components

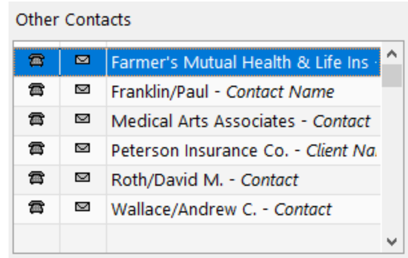
The Matter Manager is made up of several panes. The information in those panes is divided into different sections as shown. After you have selected a matter via the Matter Selector, the Current Matter field will update to reflect the Client ID, Client Name, and Work Description.



Matter Information

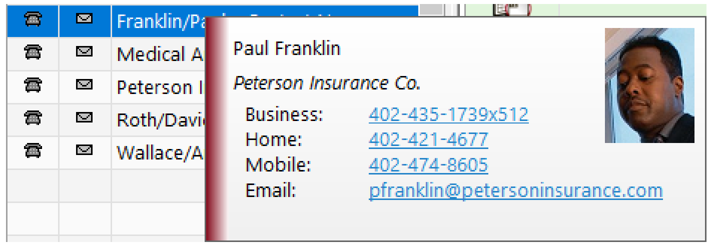
The Matter Information section includes the client's name; the work description of the selected matter; and the address, phone number, and email assigned to the selected matter. Hyperlinks to each of these fields allow you to pull up contact information, display a phone dialer, or open your default email software. If a client photo was specified for the matter contact, the photo will also appear in this pane.

Other Contacts



Each contact linked to the current client matter is included in the Other Contacts list, shown below the Matter Information pane. Clicking the phone icon will open the Phone Dialer for the current contact, whereas clicking the envelope icon will start a new email to the contact in your default email software. Double-clicking the Contact name will load the Contact Information window.

Hovering the mouse over a contact displays a contact card. The contact card contains the name, organization (if specified), primary contact phone numbers and email address for that contact. Clicking any of the hyperlinks on the card will start the Phone Dialer or your default email software.

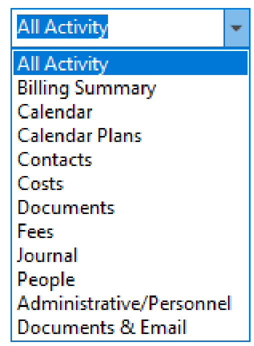


Custom Taskbar

The Taskbar on the bottom left of the Matter Manager allows you to quickly access reports and utilities. Each user can customize which buttons will appear on this taskbar. Items can be added by clicking the drop-down button and selecting the **Add or Remove Programs** menu. Mousing over a button displays a tooltip indicating which application or feature the button launches.

In this example, we have customized the taskbar to include the Client Summary Report, Conflict of Interest Search, Report Writer, Tabs3 Billing Matter Manager, Timer, Word Document Assembly, and Worldox Documents options. These buttons can easily be changed by clicking the drop-down button.

Record Type Selector



The Record Type Selector is used to choose between different types and combinations of records for the currently selected matter in the Matter Manager. There is even more customizability through the Custom Activity List, which will be discussed later in this guide.

Record List

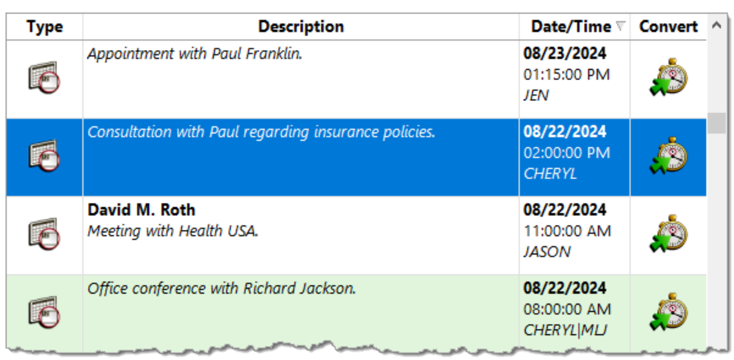
Once a Record Type is selected, the Record List will filter to show only the records that match your selection.

Search

The Search box is used to filter the records shown in the current window to only those that contain the specified text. Modifying the text in the Search box will automatically update the records shown in the window.

All Activity

Easily browse all records for a client matter using the **All Activity** menu. When **All Activity** is selected, the list displays all calendar entries, fees, costs, documents, and journal records assigned to this client in date order. Each record type has a specific icon displayed in the **Types** column. This makes it easy to identify a transaction type at a glance. Each icon is identified in the legend below:



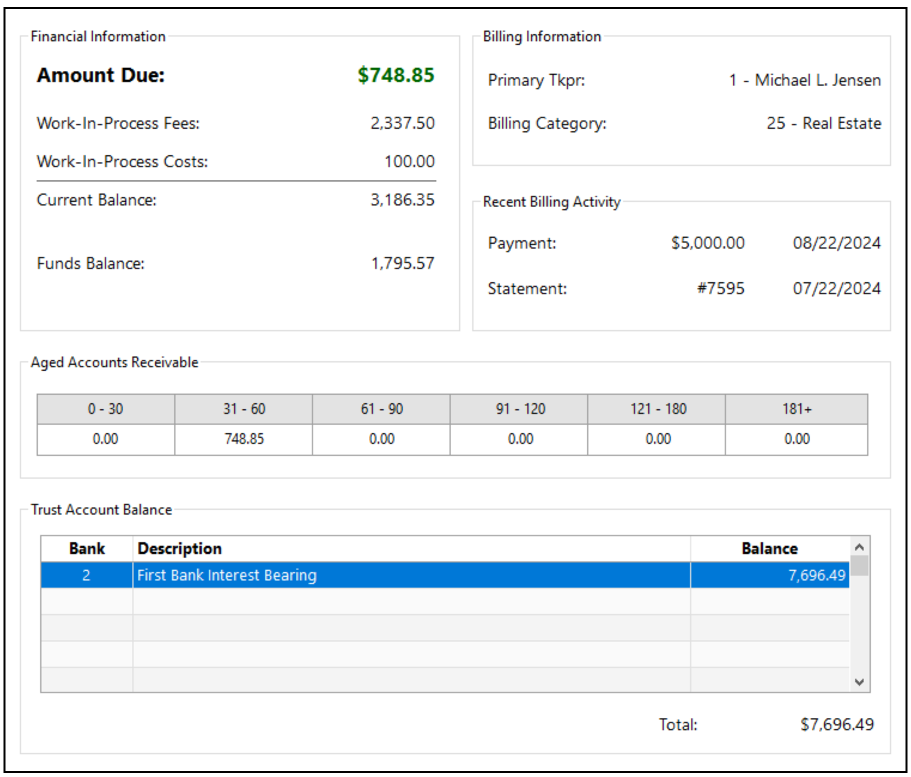
Calendar task	Calendar event	Email	Email with Attachment
Document	Fee	Cost	Billing Note
Note	Phone	Research	Timer

The information shown in the **Description** and **Date/Time** columns varies by record type and can be searched using the **Search** toolbar at the top of the Matter Manager. Double-clicking a record will open the individual transaction in the appropriate data entry window. Clicking the icon in the **Convert** column converts the individual record to a fee transaction, which can then be billed to the client in Tabs3 Billing.

Transactions that have been billed and archived in Tabs3 Billing are excluded from the **All Activity** view. However, billed and archived transactions are included when an individual transaction type is selected via the Record Selector.

Convert to Fee

Items with the icon in the Convert column can be converted to fees with just a click. This opens the Convert to Fee window, which allows you to enter a fee for the selected record. The **Hours Worked** and **Hours to Bill** fields are populated with the correct increment of time based on the duration of your timer record. The **Convert to Fee Settings** menu lets you set defaults for converted records. For more information on the options available when entering a fee record, see the Fee Entry Quick Guide.



Billing Summary

The Billing Summary provides a recap of a client matter's billing information, including current billing activity, accounts receivable information, and trust account balances. The information in this section is retrieved from Tabs3 Billing and includes the following sections.

Financial Information

The Financial Information section displays the client's current amount due, work-in-process fees, work-in-process costs, current balance, and client funds balance for the matter. An asterisk to the right of the Amount Due figure indicates that a final bill has been generated for the matter, but has not been updated.

Financial Information

Amount Due:	**$748.85**
Work-In-Process Fees:	2,337.50
Work-In-Process Costs:	100.00
Current Balance:	3,186.35
Funds Balance:	1,795.57

Billing Information

Primary Tkpr:	1 - Michael L. Jensen
Billing Category:	25 - Real Estate

Billing Information

The Billing Information section displays the Primary Timekeeper assigned to the matter as well as the matter's Billing Category.

Recent Billing Activity

The Recent Billing Activity displays the date and amount of a client's most recent payment as well as the date and statement number of the most recently updated statement for the matter.

Recent Billing Activity

Payment:	$5,000.00	08/22/2024
Statement:	#7595	07/22/2024

Aged Accounts Receivable

This section displays the accounts receivable for the matter based on Aging Periods defined in Tabs3 Billing.

Aged Accounts Receivable

0 - 30	31 - 60	61 - 90	91 - 120	121 - 180	181+
0.00	748.85	0.00	0.00	0.00	0.00

Trust Account Balance

Bank	Description	Balance
2	First Bank Interest Bearing	7,696.49
	Total:	$7,696.49

Trust Account Balance

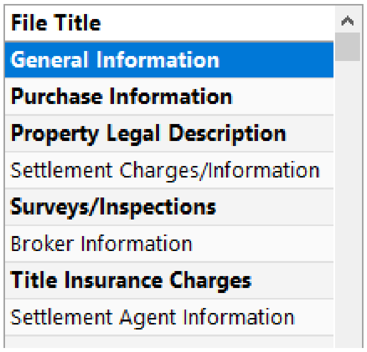
When using Tabs3 Trust Accounting, each trust account is displayed with the bank account number and current balance. A total for all trust accounts is also displayed.

Other Record Types

Along with the **All Activity** and **Billing Summary** options, the Matter Manager lets you quickly view other file information from the same window. The following options are also available via the Record Type Selector.

Individual Transaction Pages

Matter Manager lets you interact with the Fee, Cost, Calendar, Contact, Journal, and Document pages as if you had opened them directly. The Quick Clicks pane gives you access to your usual Filters, QuickViews, and Column layouts, so information can be sorted the way you want.

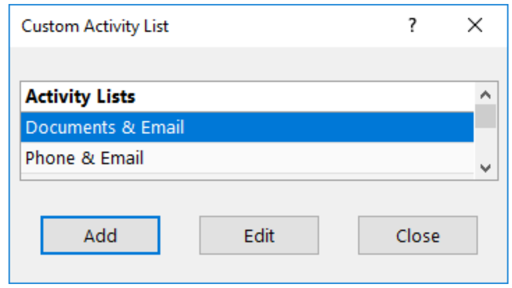


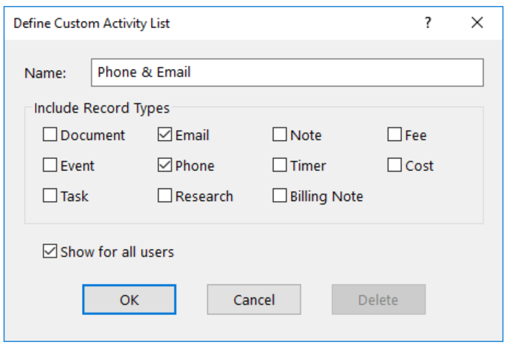
Areas of Practice

If a matter is assigned to an Area of Practice (AOP), the AOP title will appear in the Record Type Selector. Choosing this record type will display a list of files within the Area of Practice. If the matter has records associated with that particular AOP file, the title of the file will appear in bold. In the image to the left, the client matter is assigned to the Real Estate Area of Practice and has records associated with the General Information, Purchase Information, Property Legal Description, Surveys/Inspections, and Title Insurance Charges files.

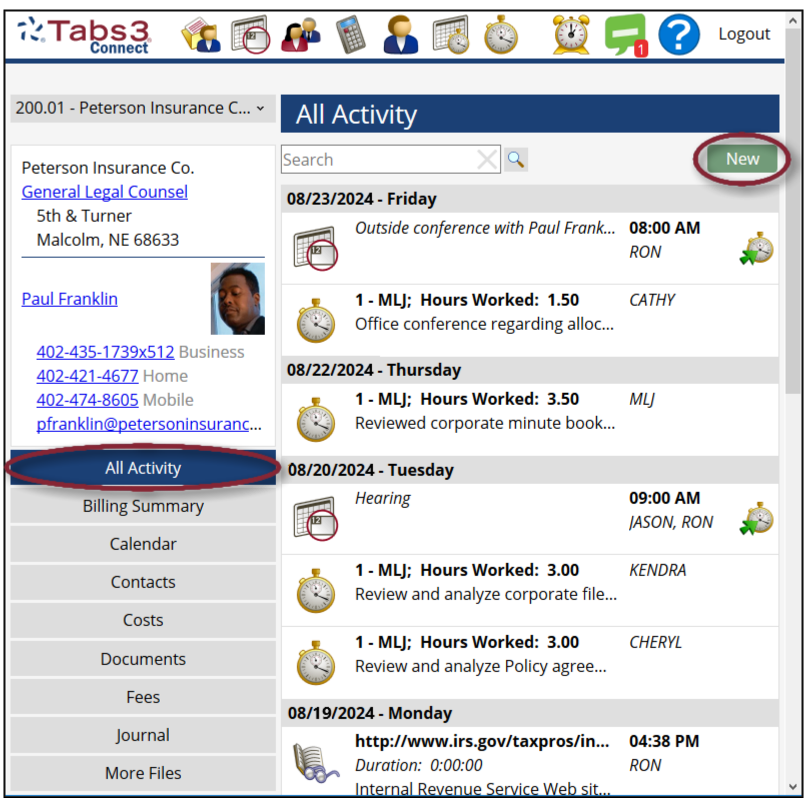
Custom Activity List

You can customize the available record types to better meet your needs. Simply right-click anywhere in the Record List and click on Custom Activity List to display the **Custom Activity List** menu. In the example to the right, we have created Custom Activity Lists that display **Documents & Email** records and **Phone & Email** records, respectively.





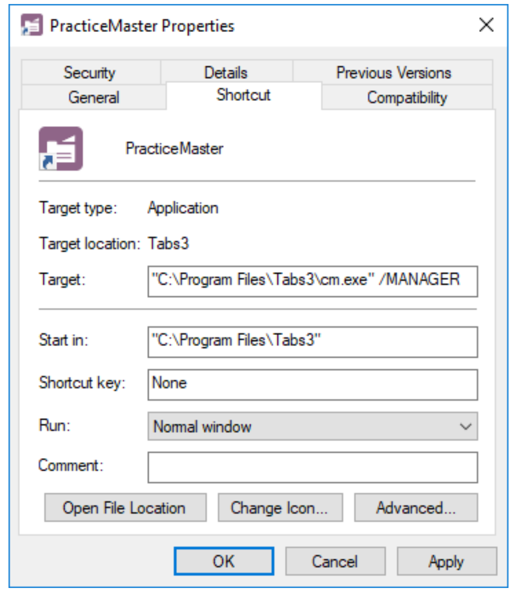
Creating a new Custom Activity List is easy. Click **Add** to display the **Define Custom Activity List** window. Enter a name for the custom list, and then choose which items you want to have appear on the list by clicking the appropriate check boxes in the **Include Record Types** section. You can optionally make this list available for all users by selecting the **Show for all users** check box.



Using Matter Manager in Tabs3 Connect

The features of the Matter Manager are also available on-the-go with Tabs3 Connect, which requires the Platinum edition of PracticeMaster (and Tabs3 Billing, if installed) or an annual subscription to Tabs3 Connect for Billing access. By navigating to www.Tabs3Connect.com from an Internet-enabled device such as your iPhone®, Android device, iPad®, or laptop, you can securely access record lists, contact information, billing information, and client-specific documents with just a few taps. The bottom left of the Matter Manager window lets you navigate between various informational views, such as the All Activity and Billing Summary views as well as views for individual pages for Fees, Costs, Documents, and Journal Records. Additional menus can be accessed by tapping the **More Files** button, including any custom lists defined. Documents and email attachments can be downloaded for easy viewing.

Matter Manager Startup Option



Users with rights to access the Matter Manager can load the Matter Manager upon starting PracticeMaster by adding the /MANAGER startup option to the **Target** field of their PracticeMaster shortcut. To add the startup option, right-click the PracticeMaster shortcut and select **Properties**. In the **Target** field, after the second quotation mark, enter a space followed by /MANAGER. The next time you open PracticeMaster using the icon, the Matter Manager will be displayed.

Shortcuts to Matter Manager

Because Matter Manager is an area you will use often, here are some shortcuts to accessing Matter Manager you will find helpful:

- Press Ctrl+M
- Click the  (Matter Manager) icon on the PracticeMaster Task Bar (provided the Main tab of the Task folder includes the Matter Manager icon)
- When on the List tab of any file
  - Select **Matter Manager** in the **Take Action** group of the Quick Clicks Pane
  - Select **Matter Manager** in the **Action** group of the Edit menu
  - Select **Matter Manager** in the **Action** group of the right-click menu
- From the Tabs3 Billing Matter Manager, click the **View in PracticeMaster** link in the **Take Action** pane.

If you are in a file (e.g., Client file, Contact file, Journal file, etc.), selecting **Matter Manager** from the **Take Action** group of the Quick Clicks pane, from the **Action** group in the Edit menu, or the **Action** group in the right-click menu will open Matter Manager for the matter on the selected record.

Conclusion

As you can see, Matter Manager is a convenient way to browse matter information, add transactions, and access frequently used functions all from within the same window. Start using Matter Manager today and streamline the way you view your client information!

For more information on Matter Manager:

- Read our online Knowledge Base Article **R11403**, “All About the PracticeMaster Matter Manager” (**support.Tabs3.com**).
- Press F1 from within the Matter Manager window to open the Matter Manager Help Topic.
- Contact your Tabs3 Software consultant, or call Tabs3 Support, available 8am to 5pm (Central Time), Monday through Friday, at (402) 419-2210.