

Pre-Install Guide



Tabs3 Billing



PracticeMaster



Trust Accounting



Accounts Payable



General Ledger

Tabs3 Software Pre-Install Guide

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Version 2025 (Friday, March 7, 2025)

Introduction

Congratulations! You are working with award-winning legal billing and practice management software. Although Tab3 Software is relatively easy to install and begin using, there are several factors that can affect both the performance and stability of the software. This guide is intended to make you are aware of these factors and help you avoid potential issues, ensuring that you get the best possible performance.

Available Resources

If you have a question or problem concerning the software, keep the following resources in mind:

- **Help Files** - Tab3 Software includes excellent context-sensitive help files. To view the relevant help topic for the current window, simply press F1 on your keyboard.
- **Knowledge Base** - The Tab3 Knowledge Base contains information on Error Troubleshooting, Networking & Windows Issues, "How To" Articles, and Product-Related Articles. Our Knowledge Base can be opened in the Quick Launch by searching for and selecting "Knowledge Base," in the software or accessed via support.Tab3.com
- **Consultants** - The consultant from whom you purchased the software license may be able to assist you if you can't find the answer in the product documentation.
- **Tab3 Support Department** - Our Tab3 Support Department can be reached by phone at (402) 419-2210 or you can request assistance via email at [Tab3.com/support](mailto:Support@Tab3.com).

System Requirements

For information regarding the current System Requirements, visit Knowledge Base Article [R11815](#), "Tab3 Software System Requirements."

For information regarding requirements for integration with third party software, visit Knowledge Base Article [R11950](#), "Third Party Integration Requirements."

Before You Install

Before installing the software, make sure your environment is correctly configured to utilize Tab3 Software.

Choosing a Data Location

The Tab3 Software applications and data files are installed and stored in a single folder known as the *Current Working Directory*. The computer where the Current Working Directory is located is known as the *server* or *file server*. Any other computers that access the Tab3 Software are known as *workstations*.

Workstations run a setup application that installs a copy of the applications on that workstation in a local program directory. These locally installed applications run on the workstation, but access the data files on the server. When a newer build of the software is installed on the server, the local applications on each workstation are updated the next time you log in to the software.

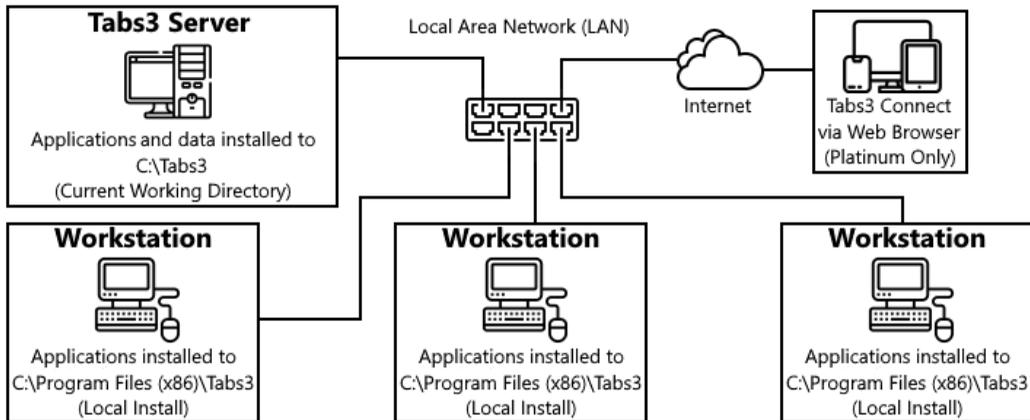


Figure 1, Files Installed on the Server and Workstations

When choosing which computer will be your firm's file server, keep the following in mind:

- The file server must be running in order for users to access the software.
- If more than a few users will be accessing the Tab3 Software simultaneously, a server operating system is required (non-server operating systems have a limited number of file sharing connections).

- Some maintenance and troubleshooting tasks are best performed at the server. Therefore, ensuring that the server is accessible either physically or via remote access software is recommended.
- The software cannot be installed to a folder that is synchronized across multiple devices, such as a Dropbox, OneDrive, or other Cloud sharing application folders. These types of products are not designed to handle database applications that update multiple data files at the same time for a single transaction, and will cause errors even for single-user configurations. See Knowledge Base Article [R11721](#), "Hosting Tab3 Software in the Cloud," for details on Cloud hosting requirements and recommendations.
- All users must have **full rights** to the Current Working Directory. Additional details regarding these requirements can be found in Knowledge Base Article [R11434](#), "User Rights Needed to Install and Use Tab3 Software."

Best Practices

Tab3 Software, like other accounting and bookkeeping data processing software, is more bandwidth intensive than general business software. The data entry and report processing functions in the software generate significantly more traffic on a network than word processing or spreadsheet software, for example. As a result, there are several best practices we recommend.

Local Network Infrastructure

A fast, stable network is necessary to achieve the best performance. We recommend running the Tab3 Software over a local high speed **wired** network whenever possible. Using the Tab3 Software over a **wireless network** is **not** recommended, as doing so typically results in reduced performance and an increased chance of network errors. Even a few additional milliseconds of latency will result in a noticeable drop in performance and stability compared to a properly configured wired Ethernet network. Wireless networks are also more prone to dropped packets due to interference, which can lead to fatal errors and potential data corruption.

Wide Area Networks and Remote Users

Many law firms now operate out of multiple locations (i.e., a Wide Area Network or WAN) or have employees who work from home. While it is technically possible to run the Tab3 Software directly over an internet-based Virtual Private Network (VPN) connection, we

strongly recommend against doing so for many of the same reasons we recommend against wireless networks (i.e., higher latency and likelihood of dropped packets):

Fortunately, there are a multiple options that allow safe and reliable access to the Tab3 Software over an internet connection:

- Desktop Virtualization services, such as Microsoft Remote Desktop Services and Citrix, host the software on either the same server as the Tab3 server or another server that is connected to it by a wired network. Users connect to a virtual workstation running on the server via software on their physical workstation.
- Using a cloud hosting solution, such as ProCirrur, Uptime Practice, or Cyberlink ASP (our Tab3 Recommended Hosting Partners), lets you access the Tab3 Software over the internet, typically via a Microsoft Remote Desktop Services or Citrix connection. This gives you the benefits of Desktop Virtualization without the need to maintain the infrastructure at your office. More information regarding ProCirrur can be found at [Tab3.com/ProCirrur](https://www.tab3.com/ProCirrur). More information regarding Uptime Practice can be found at [Tab3.com/Tab3-Uptime-Practice.html](https://www.tab3.com/Tab3-Uptime-Practice.html). More information regarding CybellinkASP can be found at [Tab3.com/CyberLinkASP](https://www.tab3.com/CyberLinkASP).
- If you have a limited number of users that need to work remotely (e.g., from home or a small satellite office), you can have them connect remotely to a workstation at the office that is on the local network using one of the following methods:
 - Remote Desktop using a VPN.
 - A remote access product such as LogMeIn or TeamViewer.

Knowledge Base Article [R10436](#), "Comparing Network and Cloud Options for Tab3 Software," provides a more in-depth explanation of the issues related to wide area networks and our recommended alternatives.

Power Management Settings

Certain power management features on computers have been known to cause problems including lost connections. Review your power management settings for the server and all workstations that use Tab3 Software, and make sure they are set to **Never Sleep**. When a computer goes into Sleep Mode, the connection to the server may be lost. This may result in the user remaining logged in, and thus requiring a reset. Additional information regarding power management settings can be found in Knowledge Base Article [R10339](#), "Power Management Issues with Tab3 Software Products."

NIC Drivers

Network Interface Cards (NIC) can cause problems if the most current drivers are not installed. Always make sure the latest NIC driver is being used. Current drivers are typically available from the manufacturer of your NIC. Knowledge Base Article [R10184](#), "Network Troubleshooting Guide," discusses these problems and others in depth.

Offline Files Not Supported

Tab3 Software does not support Offline Files. If Offline Files are enabled, you must disable Offline Files before you can use the Tab3 Software. Details regarding Offline Files can be found in Knowledge Base Article [R11450](#), "Offline Files Not Supported in Tab3 Software."

Backup Best Practices

Tab3 Software includes a built-in backup feature. In addition to using the built-in backup, it is important that you implement at least one additional external backup method. External backups should be run at least once per day, and tested on a regular basis to ensure that the software can be successfully restored. A thorough discussion of the backup options can be found in Knowledge Base Article [R11213](#), "Backup Strategy."

VSS - Volume Shadow Copy Service

Volume Shadow Copy Service (VSS) can be used to back up Tab3 Software. Firms running Tab3 Platinum software have additional options when using VSS backups. Complete details can be found in Knowledge Base Article [R11430](#), "Using Volume Shadow Copy Service (VSS) to Back Up Tab3 Software."

Battery Backup (UPS) and Surge Protection

Although not required, installing a reliable Uninterruptible Power Supply (UPS) with surge protection at the file server allows it to be safely shut down in the event of a power loss. An unexpected loss of power or power surge to the Tab3 server can result in anything from a minor inconvenience to a complete loss of data due to hardware failure.

Starter Data

Starter data is provided with Tab3 Billing, PracticeMaster, and Tab3 General Ledger (GL). During the installation process, a starter set of data is installed by default. You can

prevent starter data from being installed by clicking the **Advanced Installation Options** link during the installation process and clearing the **Install Starter Data** check box.

We recommend installing the starter data.

Starter data simplifies the initial setup process by predefining information in various setup files such as transaction codes, categories, text macros, etc. By default, a partial set of data files will be installed. If any of the data files being installed are already present, the corresponding starter data files will not be installed. These files may be modified as desired. For a list of files included in the starter data, see Knowledge Base Article [R10906](#), "Starter Data."

Installing Over Trial Data

If you had previously installed the Tab3 Trial Software and want to retain the data you entered in the full version, see the [Installing Full Software for use with Trial Software Data](#) section of Knowledge Base Article [R10341](#), "Trial Software Information & Limitations," before installing. There may be a few steps to take before installing depending on the version of the Trial Software installed.

Ready to Install

You are now ready to install the Tab3 Software.

1. During the installation process, you will need an activation code. This code should have been emailed to you by Tab3 Software or your consultant. The email also provides instructions for downloading and installing the software. Note that Platinum software must be installed at the file server.
2. Once the software has been installed, please review the [Post-Install Guide](#) for information on setting up workstations and initial configuration of the Tab3 Software.
3. If you have purchased a Platinum license, see the [Platinum Setup Guide](#) for information on configuring Platinum features such as Tab3 Connect and HotBackup.