Tabs3

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by ✓profitsolv

Tabs3 Custom Report Writer Manual

Tabs3 Billing

PracticeMaster

Trust Accounting

Accounts Payable

General Ledger

Tabs3 Custom Report Writer Manual

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Chapter 1
Introduction & Getting Started

Software Technology, Inc.

Since 1979, Software Technology, Inc., has been developing, selling and supporting top quality financial and practice management software for solos to 50+ timekeeper firms. Our software is backed by our professional staff with experience in accounting, program development and customer support. We are committed to providing our customers with user-proven, reliable software.

Tabs3 Billing Custom Report Writer Overview

The Tabs3 Billing Custom Report Writer allows users of Tabs3 software to define and print reports and forms based on information in Tabs3. Reports can be saved in a report format or various file formats including fixed or variable length field format, MS Word mail-merge format, dBASE format or WordPerfect merge format. The Forms Writer portion of the software is ideal for printing mailing labels, rotary index cards, client file labels, and much more.

The Tabs3 Billing Custom Report Writer lets you quickly create the reports you want with exactly the information you want. With the intuitive Report Writer Manager window, you will find the Tabs3 Billing Custom Report Writer extremely easy to use for running reports and forms as well as creating them. Once a report or form is defined, you can easily modify it or use it as a basis for a new report or form definition. The ability to preview a report or form while creating it lets you immediately make changes to definitions. Multiple pre-defined definitions and a tutorial make getting started a snap.

Computer Requirements

The Tabs3 Billing Custom Report Writer has the same requirements as Tabs3 with the following additional requirements:

❑ The Tabs3 Billing Custom Report Writer requires approximately 1 MB of additional disk storage space.

The Tabs3 Billing Custom Report Writer must be run on the same computer on which Tabs3 is being run. The Report Writer saves its data files in the Tabs3 program directory. The Report Writer also uses the Tabs3 data files.

Tabs3 Report Writer can use any of the installed Windows printers.

Note: The Tabs3 software must be installed before installing the Tabs3 Report Writer software. Make sure the Tabs3 and Tabs3 Report Writer versions match. For example, if you have Version 17 of Tabs3, you must also have Version 17 of the Tabs3 Report Writer.

Tutorial

A tutorial for the Tabs3 Report Writer software is available in Chapter 5 of this manual. The tutorial will step you through installation and how to start the software. You will create one Tabs3 report and two Tabs3 forms. You will also print the report, report definition, forms and form definitions.

If this is your first experience with the Tabs3 Report Writer, we recommend you skip to Chapter 5 of this manual and follow the tutorial. The estimated completion time of the tutorial is 60 minutes.

Conventions Used in this Manual

The term "click" or "clicking" means to select the specified item by clicking the primary mouse button once. The term "double-click" means to select the specified item by clicking the primary mouse button twice. The term "right-click" means to select the specified item by clicking the secondary mouse button once (usually the right mouse button). If desired, the keyboard method can be used to select the specified item. Details regarding keystrokes can be found beginning on page 3.

This manual shows command button labels in **bold face** type.

Conventions Used in the Program

The software uses a "Multiple Document Interface". This interface allows multiple program windows to be open at the same time. For example, you can have a report writer definition window open, a client window open, and two fee windows open all at the same time. In addition to opening multiple program windows, each user can open multiple programs on the same workstation as well as open multiple copies of the same program on the same workstation. All of these tasks can be accomplished without logging in as another user. Keep in mind that certain tasks require exclusive use of the software.

Installing Tabs3 Billing Custom Report Writer

Note: The Tabs3 Billing Custom Report Writer is accessed via the Tabs3 **Reports** menu. Install the Tabs3 Report Writer software *after* you have installed Tabs3.

Note: During installation a file named READWSTI.WRI is installed. This file contains information regarding the software that may not appear elsewhere in the documentation.

Tabs3 Report Writer software is provided on a CD and must be installed to a hard disk where Tabs3 is installed.

▶ **To install Tabs3 Billing Custom Report Writer on your hard disk:**

1. Insert the CD into your CD drive.

2. A CD Browser program will automatically start.

   Note: If the CD Autorun feature is disabled, click the **Start** button, and then click **Run**. Click the **Browse** button and navigate to the CD drive. Double-click the **LAUNCH.EXE** file. Click **OK**.

3. Select the appropriate menu option depending on whether you are installing full working versions or trial versions.

4. Follow the on-screen instructions to install the software.

Note: Tabs3 Report Writer *must* be installed in the same directory as the System Configuration and Tabs3 programs.

Starting Up the Tabs3 Billing Custom Report Writer

To start the Tabs3 Billing Custom Report Writer, you must first start Tabs3. From the Tabs3 window, click **Reports** and then click **Report Writer**. If the Tabs3 Report Writer module has not been installed, the Report Writer menu option will be dimmed.
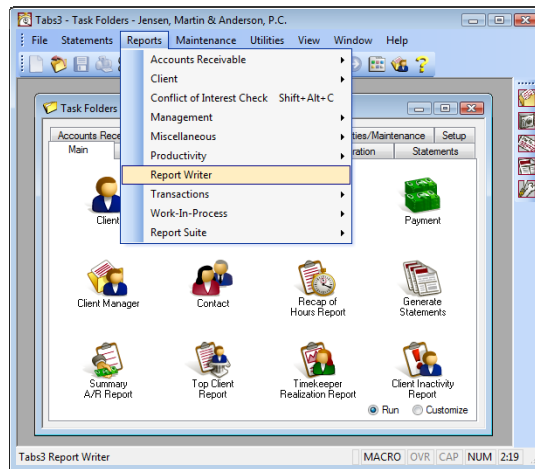
Fig. 1-1, Menu Options Used to Start the Tabs3 Report Writer

Once the Report Writer has been started, the Report Writer Manager window will be displayed (page 7).

Access Rights

System security is implemented by defining access rights and passwords using the System Configuration program. System security consists of defining user records, access profiles, then assigning one or more access profiles to each user. Access rights are defined for each access profile level whereas passwords are optionally defined for each user. Members of the Manager access profile have access rights to all programs in the software. If a user is assigned access rights to Report Writer, the user will have access to all functions in Report Writer.

Additionally, Tabs3 has the ability to designate clients as secure clients, thereby preventing access to those clients unless rights are specifically granted to the user. As another level of security, you can set up a User ID so the user has access to a particular timekeeper's transactions but does not have access to other timekeeper's transactions. These security protocols also apply to Tabs3 Report Writer. Refer to **Security Overview** in the Tabs3 Help for a detailed overview of all security features in Tabs3.

Data Entry Keystrokes

Text Editing Keystrokes

Left-Arrow   Moves the cursor left one character.

Right-Arrow   Moves the cursor right one character.

Ctrl + Left-Arrow	Moves the cursor left one word.
Ctrl + Right-Arrow	Moves the cursor right one word.
Home	Moves the cursor to the beginning of a field or line.
End	Moves the cursor to the end of a field or line.
Ctrl + Home	Moves the cursor to the beginning of a field.
Ctrl + End	Moves the cursor to the end of a field.
Tab	Moves the cursor to the next field.
Enter	Moves the cursor to the next field (data entry windows only).
Shift + Tab	Moves the cursor to the previous field.
Shift + Enter	Moves the cursor to the previous field (data entry windows only).
Del	Deletes the character to the right of the cursor or deletes selected text.
Backspace	Deletes the character to the left of the cursor or deletes selected text.
Ctrl + Del	Deletes all characters to the right of the cursor on the current line.

General Windows Keystrokes

Ctrl+F4	Closes the current window (not the main application window).
Alt+F4	Closes the main application window.
Ctrl+F6	Switches to the next window within the main application window.
Ctrl+Shift+F6	Switches to the previous window within the main application window.
Alt+Tab	Switches to the next application in Windows.
Ctrl+Tab *or* Ctrl+PgDn	Moves forward through program tabs in a window.
Ctrl+Shift+Tab *or* Ctrl+PgUp	Moves backward through program tabs in a window.
Alt + Down-Arrow	Displays drop-down lists and lookup windows where applicable.

Lookup Windows

A lookup window is indicated by a button. Clicking this button or pressing **Alt+Down-Arrow** will display a lookup window for the associated field. Lookup windows are used to select a specific record. Every other row is lightly shaded making it easy to read across the row.

While in a lookup window, you can use the PgUp, PgDn, Up-Arrow, Down-Arrow, Home and End keys to scroll through existing records (provided focus is on the list portion of the window). Scroll bars can also be used to scroll through the list of records. The **OK** button or the Enter key is used to select a highlighted record, and the **Cancel** button or the ESC key can be used to close the window. Double-clicking can also be used to select a record and close the window.

Lookup windows can be repositioned and resized but must be closed before switching to any other task. The size and position of each lookup window is saved each time the lookup window is closed. Column widths in the lookup window can also be resized and are saved. To resize a column, move the mouse pointer between the desired column headings, then click and drag the right side of the column to the desired size.

In most lookup windows, you can change the sorting order of the records by clicking a column heading. An ascending ▲ sort indicator will be shown in the column heading indicating the sorting order. Clicking the same column heading again will reverse the sort order and change the sort indicator to a descending ▼ sort indicator. In most instances, the secondary sort is entry order.

Incremental Searching	Incremental searching capabilities are available in all lookup windows based on the sorted column. After typing a letter or number when a lookup window is displayed, a small incremental search window will open allowing you to type more characters. As each character is typed, the next record in the sorted column that matches the character entered will be highlighted.
Autofill	All fields with lookup windows have autofill capabilities. As you enter characters into a lookup field, the field will autofill based on the information entered. Also, a list of possible choices matching the characters entered will be displayed, allowing you to easily select the entry you want to complete the field.

Backing Up

To guard against loss of data, backup copies of your data should be made and stored in a safe location. It is your responsibility to establish adequate and frequent backup procedures. Your reseller or computer dealer can assist you with this task.

Note: The Back Up Data Files program provided with Tabs3 does not back up Report Writer data files.

All Tabs3 Report Writer definition files end with the file extension of "T3R" or "T3L":

.T3R(Reports)*

.T3L(Forms)*

The only other Tabs3 Report Writer data file is the table of contents file. The Rebuild Table of Contents program *(page 9)* can be used to recreate the table of contents file. The table of contents file is named:

WT3RWDEF.TOC

Default Windows Printer

The software can print to any installed Windows printer. Each time a report is generated, the Windows printer selected is saved as the default Windows report printer.

Complete details regarding Print Setup can be found in Help and the Tabs3 manual.

Note: The **Use Commas in All Numeric Fields** check box in the Advanced Printing Features of Print Setup is not used by Tabs3 Report Writer. Instead, the use of commas is controlled on the **Main** tab of the report definition by the **Print Commas in Amounts** check box.

Chapter 2
Report Writer Manager

2

Report Writer
Manager

Introduction

Tabs3 Report Writer lets you create **definitions** for custom reports and forms. Definitions include the instructions that are used to create reports and forms. Definitions consist of report writer definitions and form definitions. Report writer definitions are defined in the Report Writer window *(Chapter 3)*. Form definitions are defined in the Forms Writer window *(Chapter 4)*. Once defined, these definitions can be used to generate reports and forms. Report writer definitions end in *.T3R and form definitions end in *.T3L. All definitions are stored in the working directory and are shown in the Tabs3 Report Writer table of contents.

Report Writer Manager

The Report Writer Manager is shown when the **Reports | Report Writer** menu options are selected from the Tabs3 menu bar. The Report Writer Manager consists of a table of contents and is also used to access the various functions in the Report Writer. The **Report Writer Table of Contents** list is a list of report writer and form definitions. The name, type, description and last modified date is shown for each report writer and form definition in the list. The Report Writer Manager Table of Contents file is named WT3RWDEF.TOC and is located in the current working directory. Report writer definitions are shown first in alphabetical order by name followed by form definitions in alphabetical order by name.

The Report Writer Manager is used to create, modify, delete, copy and rename report writer and form definitions. This window includes a list of custom reports which is also referred to as the Table of Contents. You can use the PgUp, PgDn, Up-Arrow, Down-Arrow, Home and End keystrokes as well as the scroll bars to scroll through the Table of Contents.
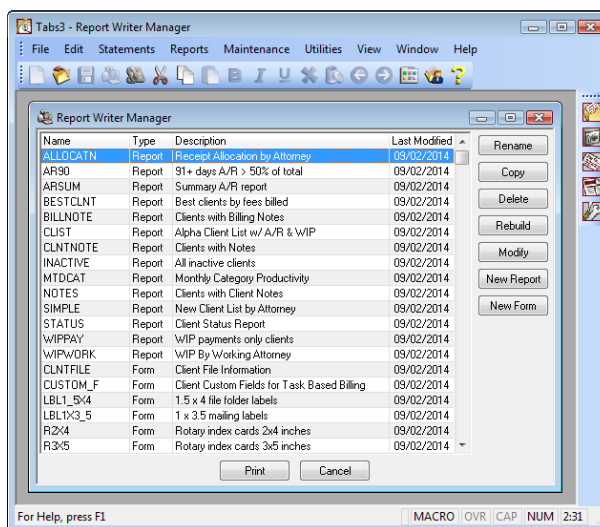
Fig. 2-1, Report Writer Manager

The following buttons are available in the Report Writer Manager:

Rename	The **Rename** button allows you to rename the highlighted definition.
Copy	The **Copy** button allows you to copy the highlighted definition to a new name.
Delete	The **Delete** button allows you to delete the highlighted definition.
Rebuild	The **Rebuild** button allows you to rebuild the Table of Contents.
Modify	The **Modify** button allows you to modify the highlighted definition.
New Report	The **New Report** button allows you to create a brand new report writer definition from scratch.
New Form	The **New Form** button allows you to create a brand new form definition from scratch.

The **Print** button can be used to print the highlighted report or form. Double-clicking a definition shown in the list can also be used to print a report or form.

The **Cancel** button, the 📁 button, or ESC can be used to close the Report Writer Manager.

Rename Definition

Access	*Reports	Report Writer	Report Writer Manager	Rename*
Purpose	The **Rename** button is used to rename a previously created definition. The definition file is renamed and the Table of Contents file is changed to reflect the new name. The Last Modified date in the Table of Contents file is not changed.

To rename a definition, highlight the definition you want renamed in the Report Writer Manager. Click the **Rename** button. A dialog box will be displayed allowing you to enter a New Name.

New Name	Maximum of 8 characters. The Report Name can consist of letters, numbers and the underscore character. You cannot specify a Report Name that already exists.
	Note: All report writer definitions are saved with an extension of "T3R" (i.e., "*.T3R"). All form definitions are saved with an extension of "T3L" (i.e., "*.T3L").

Once you have entered the New Name, click **OK** to rename the definition.

The **Cancel** button will return to the Report Writer Manager without renaming the definition.

Copy Definition

Access	*Reports	Report Writer	Report Writer Manager	Copy*
Purpose	The **Copy** button is used to copy an existing definition to a new name thus allowing you to use an existing definition as a basis for a new definition. The definition file is copied and the Table of Contents file is changed to include the new name.

To copy a definition, highlight the desired definition in the Report Writer Manager and click **Copy**. A dialog box will be displayed allowing you to specify a name for the new definition.

New Report Name	Maximum of 8 characters. The Report Name can consist of letters, numbers and the underscore character.
	Note: All report writer definitions are saved with an extension of "T3R" (i.e., "*.T3R"). All form definitions are saved with an extension of "T3L" (i.e., "*.T3L").

Once you have entered the New Name, click **OK** to copy the definition.

The **Cancel** button will return to the Report Writer Manager without copying the definition.

Delete Definition

Access	*Reports	Report Writer	Report Writer Manager	Delete*
Purpose	The **Delete** button is used to delete an existing definition from the Table of Contents and the directory. The definition is deleted and the Table of Contents file is modified to eliminate the deleted definition.

To delete a definition, highlight the desired definition in the Report Writer Manager and click **Delete**. You will be prompted to confirm that you want to delete the definition. Click **Yes** if you want to delete the definition. Otherwise, click **No** if you do not want to delete the definition. You will be returned to the Report Writer Manager.

Rebuild Table of Contents

Access	*Reports	Report Writer	Report Writer Manager	Rebuild*
Purpose	To recreate the Table of Contents file based on the report definitions and form definitions found in the current working directory.

The information shown in the Tabs3 Report Writer Table of Contents is stored in a single table of contents file (WT3RWDEF.TOC). This file may need to be rebuilt if report writer or form definitions are manually added, edited, deleted or renamed via the operating system.

The rebuild process deletes the current Table of Contents file and recreates a new one based on the report writer definitions (*.T3R) and form definitions (*.T3L) in the Tabs3 working directory. The rebuild process retrieves the type of definition, the definition name, the report description and the date the report was last edited.

To rebuild the Table of Contents, click the **Rebuild** button in the Report Writer Manager. You will be asked to confirm that you want to rebuild the Table of Contents.

Click **Yes** if you want to begin the rebuild process. Upon confirmation, the rebuild process will begin and a progress indicator will be shown indicating how far along the rebuild process is. Upon completion, you will be returned to the Report Writer Manager. The rebuild process takes a matter of seconds to complete and cannot be aborted once started. Running this program does not delete any data. It can be run multiple times without having any adverse effect.

Click **No** if you do not want to rebuild the Report Writer Table of Contents. You will be returned to the Report Writer Manager.

Why would I want to rebuild the Table of Contents?

Typically, you shouldn't have to rebuild the Table of Contents. The most common reason for having to rebuild is when you receive a report definition from a third party. For example, if a reseller or consultant prepared definitions for your firm, the definitions would have to be copied to your Tabs3 working directory on your computer. Once transferred, in order to access the definitions via the Report Writer Manager, the definitions would have to be present in the Table of Contents file. In order for the new definitions to be shown in the Table of Contents on your computer, the table of contents must be rebuilt.

Modify Definition

Access   ***Reports | Report Writer | Report Writer Manager | Modify***

Purpose   The **Modify** button is used to edit a previously created definition.

To modify a definition, highlight the desired definition in the Report Writer Manager and click **Modify**. The Report Writer window *(page 13)* or Forms Writer window *(page 39)* will be displayed depending on whether you are modifying a report definition or a form definition.

New Report

Access   ***Reports | Report Writer | Report Writer Manager | New Report***

Purpose   The **New Report** button is used to create a new report writer definition.

To create a new report writer definition, click the **New Report** button in the Report Writer Manager window. A dialog box will be displayed allowing you to enter a New Name.

New Name   Maximum of 8 characters. The Report Name can consist of letters, numbers and the underscore character. You cannot specify a Report Name that already exists.

           Note: All report writer definitions are saved with an extension of "T3R" (i.e., "*.T3R").

Once you have entered the New Name, click **OK** to create the report. The Report Writer window *(page 13)* will be displayed allowing you to define the report writer definition.

The **Cancel** button will return to the Report Writer Manager without creating the definition.

New Form

Access   ***Reports | Report Writer | Report Writer Manager | New Form***

Purpose   The **New Form** button is used to create a new form definition.

To create a new form definition, click the **New Form** button in the Report Writer Manager window. A dialog box will be displayed allowing you to enter a New Name.

New Name   Maximum of 8 characters. The Report Name can consist of letters, numbers and the underscore character. You cannot specify a Report Name that already exists.

           Note: All form definitions are saved with an extension of "T3L" (i.e., "*.T3L").

Once you have entered the New Name, click **OK** to create the form. The Forms Writer window *(page 39)* will be displayed allowing you to define the form definition.

The **Cancel** button will return to the Report Writer Manager without creating the definition.

Printing a Report, Form, or Definition

Access	*Reports	Report Writer	Report Writer Manager	Print*
Purpose	To print a report, report definition, form or form definition.

Highlight the desired report or form in the Report Writer Manager. Click the **Print** button or double-click the desired definition. The **Print** tab will be displayed. Click the **Print** button if you want to print a report or form. Otherwise, click the **Print Definition** button if you want to print a report definition or form definition. The Print dialog box will be displayed allowing you to display, print, or save the report, form or definition to a disk file, or save the report to the DropBox.

Chapter 3
Report Writer Window

Report Writer Window

The Report Writer window is shown after selecting a report via the Report Writer Manager and clicking the **Modify** or **New Report** buttons. The report writer definition name is shown in the title bar.

The Report Writer window consists of the following tabs:

Note: Only the **Print** and **Query** tabs are shown when using the **Print** button via the Report Writer Manager.

Main Tab

The **Main** tab of the Report Writer window is used to define standard settings such as the report description and the report headings.
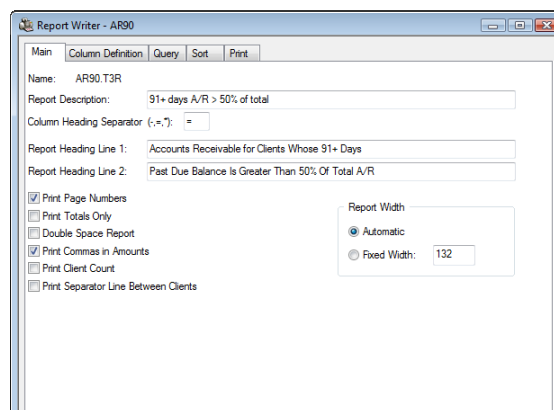
Fig. 3-1, Main Tab of a Report Definition

Name

The Name is shown for reference purposes only and represents the file name where the report writer definition is stored. The report writer definition is named using the **New Report**, **Rename**, or **Copy** buttons in the Report Writer Manager *(page 7)*. The Name will be displayed in the Report Writer Manager and in the title bar of the Report Writer window.

Report Description	Maximum of 50 characters. Enter a description that describes the report's function. The Report Description will be displayed in the Report Writer Manager and in the title bar of the Report Writer window.
Column Heading Separator (-,=,*)	Enter one character to be used as a column heading separator. Only the characters shown (-, =, or *) can be used. The dash symbol and equal symbol work quite well for this purpose.

Note: The column heading separator prints the width of the heading, not the width of the column.

FEE WIP	FEE WIP
0.00	0.00
412.50	412.50
617.50	617.50

Fig. 3-2, Examples of Column Heading Separators

Report Heading Line 1	Maximum of 50 characters. Enter the first line of the Report Heading. The report headings will print centered on all pages of the report. If the first heading line is left blank, only the date and optional page number will print for the first heading line.
Report Heading Line 2	Maximum of 50 characters. Enter the second line of the Report Heading. The report headings will print centered on all pages of the report. If the second heading line is left blank, no heading line will print and the firm name will print directly below the first heading line.

Date: 11/15/2014	**Preferred Client List Sorted By**	Page: 1
	Highest Fees Billed	
	Burns, Jensen, & Powers, P.C.	

Fig. 3-3, Example of a Report Heading.
The first two lines contain Report Heading Lines 1 and 2.
The third line is the firm's name from Firm Information in the System Configuration program.

Print Page Numbers	Select this check box if you want the page numbers to be printed on the report. The page numbers will print right justified on the first heading line of each page.
	Clear this check box if you do not want page numbers printed on the report.
Print Totals Only	Select this check box if you do not want the detail for each client to print and only want to print totals.
	Clear this check box if want to print the detail for each client.

Note: If you select this check box and totals are not printing, make sure each column you want to subtotal has its **Subtotal** check box on the **Column Definition** tab selected.

Double Space Report	Select this check box if you want the report to be double spaced.
	Clear this check box if you want the report to be single spaced.
Print Commas in Amounts	Select this check box if you want commas to be used in amounts on the report.
	Clear this check box if you do not want commas to be used in amounts on the report.

Note: Use of commas in amounts may require wider column widths.

Print Client Count	Select this check box if you want a count of selected client records to print at the end of the report. If this check box is selected, the text "Total Client Record Count: XXXXX" will be printed at the end of the report where "XXXXX" represents the number of clients included.
	Clear this check box if you do not want a count of client records to print at the end of the report.
Print Separator Line Between Clients	Select this check box if you want a ruling line to print between each client record on the report.
	Clear this check box if you do not want a ruling line to print between each client record.
Report Width	Select the type of Report Width you want used for the report. The Report Width essentially determines the overall width that will be used by the report headings. When printing or previewing, the maximum report width is 510. Anything that exceeds 510 will be truncated.

	Automatic	Select **Automatic** if you want the width to be the total of all columns defined on the **Column Definition** tab.
	Fixed Width	Select **Fixed Width** if you want the report width to be a specific width. If you select **Fixed Width**, you will be allowed to specify the width. The maximum width is 510. If you attempt to add columns that allow the total report width to exceed the defined width, "(Overflow)" will be displayed next to the **Total Width** field at the bottom right side of the **Column Definition** tab.

Column Definition Tab

The **Column Definition** tab of the Report Writer window is the "heart" of the report definition. This is where columns and formulas are defined. Each report can consist of up to 200 columns that are user defined. Rows always represent one client record. The number of rows depends on the number of clients you have in Tabs3. Each column will be either a field from the Tabs3 Data or a formula line. This tab includes the Tabs3 field used for the column, a formula if the column is a formula column, the width of the column, the column headings, the subtotaling prompt, the option to leave amounts blank when zero and whether to print on the primary or secondary subtotal line.
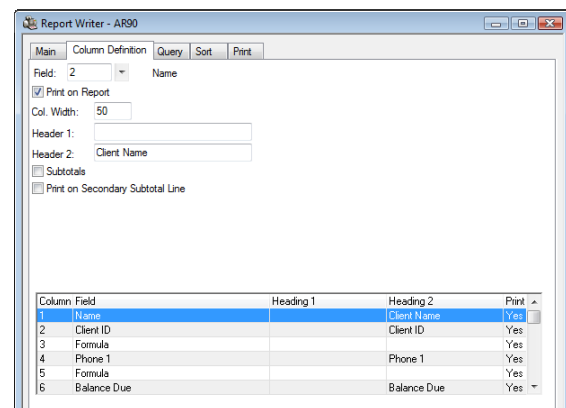
Fig. 3-4, Column Definition Tab of a Report Definition

As each column is added, it is shown in the display of columns in the lower portion of the window. Each line in the display of columns represents a single column. To modify an existing column, simply highlight the desired column and the associated fields with that column will be displayed in the upper portion of the window.

New Column	The **New Column** button can be used to define a new column. You can also click on the (New Column) row in the column display to add a new column. To insert a column between existing columns, add a new column and then use the **Move Up** button to move the column to the desired position.
Delete	The **Delete** button can be used to delete the highlighted column. A column that has been defined as a sort column, selection criteria or used in a formula cannot be deleted.

Move Up	The **Move Up** button or Ctrl+Up can be used to move the highlighted column up one row. All column references in formula lines will automatically be renumbered.
Move Down	The **Move Down** button or Ctrl+Down can be used to move the highlighted column down one row. All column references in formula lines will automatically be renumbered.

Archive Note: When specifying archive information, amounts for deleted clients are not accessible.

Types of Fields

The data fields in Tabs3 from which data can be selected are classified as the following field types:

Decimal	A **decimal** field is a field that represents a dollar amount, a percentage amount or an hours field.
Numeric	A **numeric** field is a field that represents a non-decimal number such as timekeeper number and rate code.
Alphanumeric	An **alphanumeric** field is a field that represents an alphanumeric field such as the client name, timekeeper initials, category description, phone number, client notes, etc. Check box fields are also considered alphanumeric fields (i.e., selected = "Y", cleared = "N").
Date	A **date** field is a field that represents a date such as date opened or last statement date.

Note: The fields available for the Report Writer and Forms Writer are the same with the following exceptions. The Formula (#132), Client Notes (#40), Billing Notes and Instructions (#45), Beginning Statement Notes (#46) and Ending Statement Notes (#47) fields are not available in the Forms Writer. The Text field (#133) is not available in the Report Writer.

Note: Appendix A in the Tabs3 Report Writer manual includes a chart that defines each field.

The following figures show the **Column Definition** tab for the various type of fields.
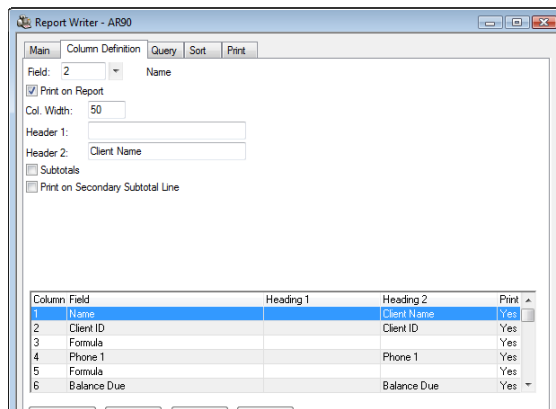
Fig. 3-5, Example of an Alpha Field
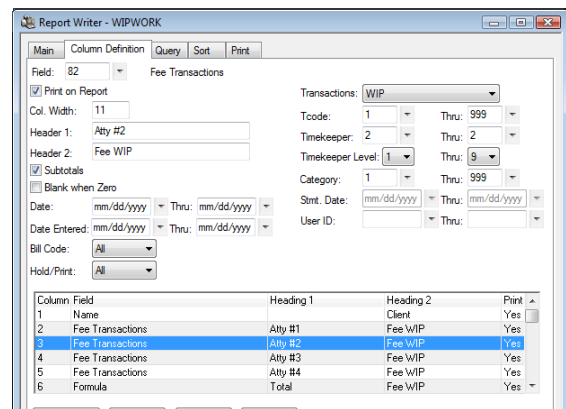
Fig. 3-6, Example of a Numeric Work-In-Process Field or Archived Field
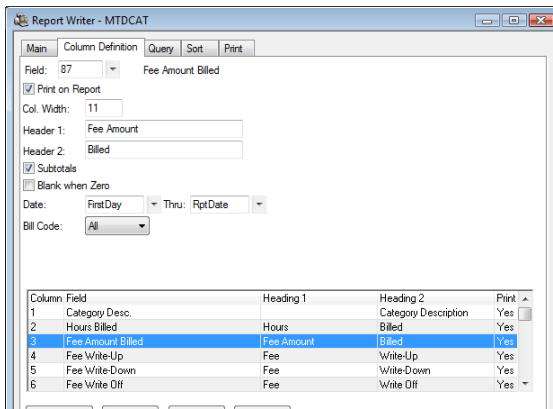
Fig. 3-7, Example of a Billed Field or
Write-Up/Write-Down Field
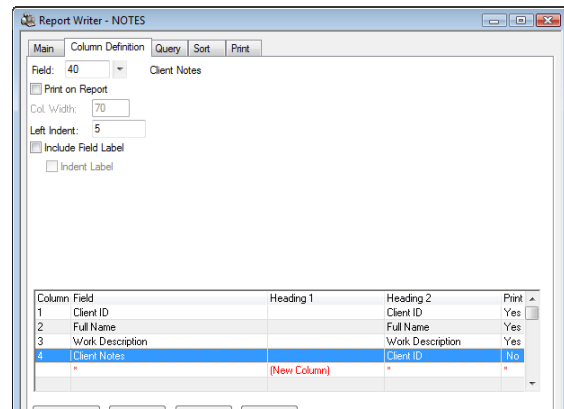
Fig. 3-8, Example of a Client Notes Field

Fields on the Column Definition Tab

Not all fields are available for all columns. The fields that are displayed depend on the type of column being defined. The following fields are available:

Field

Maximum of 3 digits (1-132). Columns are based on a data field or a formula. Select a number from "1-131" to specify a data field. Select field "132" if you want to define a formula. After selecting a field, the field name will be displayed to the right of the field number.

The ⌄ button can be used to open the Field Lookup window that allows you to view a list of fields and select a field or formula by double-clicking it. Appendix A includes a list of all available fields.

Print on Report

Information in columns can be printed on a report or used for calculations, or selection and sorting purposes.

Note: In order to select a field for sorting, it must be defined as a column.

Select this check box if you want the column to print on the report.

Clear this check box if you do not want the column to print on the report. For example, if you want to use a field in a formula line but don't want the field to print on the report, you would clear this check box. As another example, you may want to sort and total a report by category, but you don't want the category to print in a separate column on the report since the category number already prints in the subtotal line. When this check box is cleared, the Column Width, Header 1 and Header 2 fields will be unavailable.

Note: If the column you are defining is a Client Notes (#40), Billing Notes and Instructions (#45), Beginning Statement Notes (#46) or Ending Statement Notes (#47) field, the **Print on Report** field behaves differently. When including notes on a report, the notes text begins printing on the line below the client record. The **Column Width** field allows you to specify the width of the notes. Notes will be reformatted to the specified width. When including notes on a report, you will also be allowed to specify a Left Indent for the notes. Column headings cannot be defined for the notes column, however the note field label can optionally be included. Notes cannot be used in sorts or selection criteria. However, if you clear the **Print on Report** check box when defining a notes column, only clients with that type of note will be eligible for selection.

Column Width

Maximum of 3 digits (1-255). Enter the width of the column. The column width is measured by the number of characters. The default column width is the width

of the Tabs3 data field. You can accept the default column width or widen or narrow it as desired.

After specifying the Column Width, the overall total width for the report will be shown at the bottom right-hand corner of the window. The text "(Overflow)" will be shown next to the overall total width if the column width specified causes the overall total width to exceed a fixed report width. However, you will be permitted to add the column.

Note: The **Column Width** field is available only when the **Print on Report** check box is selected.

Note: You may want to increase the default column size of "11" for numeric columns if you are working with large dollar amounts and are including commas on the report.

Note: Alphanumeric fields are always left justified; numeric and decimal fields are typically right justified.

Note: When the contents of a numeric column exactly fit or exceed the column width, a carriage return is generated causing the remaining line of output to be printed on the next line. To avoid this situation, increase the column width.

Notes Fields	If the column you are defining is a Client Notes (#40), Billing Notes and Instructions (#45), Beginning Statement Notes (#46) or Ending Statement Notes (#47) field, the **Print on Report** field behaves differently. When including notes on a report, the notes text begins printing on the line below the client record. The Column Width field allows you to specify the width of the notes. Notes will be reformatted to the specified width. When including notes on a report, you will also be allowed to specify a Left Indent for the notes. Column headings cannot be defined for the notes column, however the note field label can optionally be included. Notes cannot be used in sorts or selection criteria. However, if you clear the **Print on Report** check box when defining a notes column, only clients with notes will be eligible for selection.

Note: Notes fields are not exported unless the Report Format is specified when printing the report.

Header 1 **Header 2**	Up to two lines of column headings can be assigned to each column. The length of the heading is based on the column width. Enter the column heading that you want to print on the first line in the Header 1 field and the column heading that you want printed on the second line in the Header 2 field. Column headings will always print right justified for numerical fields and left justified for alphanumeric and date fields.

Note: When using one-line column headings, you may want to use Header 2 instead of Header 1 to avoid a blank line between the heading line and the column heading separator.

Note: These fields are not available if the **Print on Report** check box is cleared. Also, these fields will not be displayed if you are defining a Client Notes (field 40), Billing Notes and Instructions (#45), Beginning Statement Notes (#46) or Ending Statement Notes (#47) column.

Left Indent	Maximum of 2 digits (0-99). This field will only be displayed when you are defining a Client Notes, Billing Notes and Instructions, Beginning Statement

Notes, or Ending Statement Notes column. Notes begin printing on the line below the client record. Enter the number of characters you want the notes field indented.

The field label will also be indented provided the Include Field Label and Indent Label check box is selected.

Subtotals

This check box determines whether a subtotal will print for a column.

Select this check box if you want a subtotal to print for the numeric column being defined.

Clear this check box if you do not want the subtotal to print. If this check box is cleared, subtotals specified on the **Sort** tab will not be printed.

Note: Subtotal figures cannot be used in formula lines.

Blank When Zero

This field determines whether a value of zero should print. In some instances, it may be desirable to only print the value if it is a non-zero amount.

Select this check box if you do not want an amount to print when the amount is zero.

Clear this check box if you always want an amount to print, even if it is zero.

Note: This field is displayed only if the column being defined is a decimal column or a formula column.

Print on Secondary Subtotal Line

This field is available if the column being defined is an alphanumeric column.

Clear this check box if you want the field text to print on the primary subtotal line.

Select this check box if you want the field text to print on the secondary subtotal line.

Hint: If you do not want the field text to print on the subtotal line, clear the **Subtotals** check box.

Include Field Label

This field determines whether a label for a note field will be displayed prior to the note. This option is available for the Client Notes (#40), Billing Notes and Instructions (#45), Beginning Statement Notes (#46), and Ending Statement Notes (#47) fields.

Select this check box if you want a label for the note field to print. The label will be printed above the note. If the **Indent Label** check box is selected, the label will use the same indent as the note.

Clear this check box if you want the note to print, without a label.

Indent Label

This check box will only be available when you are defining a Client Notes, Billing Notes and Instructions, Beginning Statement Notes, or Ending Statement Notes column *and* the **Include Field Label** check box is selected.

Select this check box if you want the field label to indent the amount specified in the Left Indent field. When this check box is selected, the field label will print directly above the notes field.

Clear this check box is you do not want the field label to indent the amount specified in the Left Indent field. When this check box is cleared, the field label will print in the far left column regardless of where the notes print.

Custom Field	Maximum of 2 digits (1-50). Enter the number for the Custom Field you want to print in the column.
Print	Select whether you want the Label, Text, or Label and Text to print.

Label	Select **Label** if you want only the Label for the custom field to print.
Text	Select **Text** if you want only the Text for the custom field to print.
Label and Text	Select **Label and Text** if you want the Label and Text for the custom field to print.

Date	Enter the beginning and ending transaction date for the transactions you want selected.

The default beginning and ending date is "mm/dd/yyyy". If you want all transactions selected, accept the default beginning and ending dates.

Press "R" if you want the report date specified when the report is generated to be used for the date. The text "RptDate" will be displayed in the date field indicating that the report date will be used for the date field.

Press "F" if you want the first day of the month specified for the report date to be used as the beginning date. The text "FirstDay" will be displayed in the date field indicating that the first day of the month specified for the report date will be used for the date field.

Note: Use of "R" and "F" in the date fields as the beginning or ending date allows you to run the report every month without having to edit the report writer definition.

Archive Note: When including archived transactions, you will also be asked to specify a beginning and ending statement date. Only those archived transactions that are included in both date ranges specified will be selected.

Note: If the column being defined is based on a Billed field, a Write-Up/Write-Down field, a Write Off field or one of the processed Payments fields (field #'s 86-112), the date is based on the date stored in the client ledger record.

Date Entered	Enter the beginning and ending date of entry for the transactions you want selected.

The default beginning and ending date is "mm/dd/yyyy". If you want all transactions selected, accept the default beginning and ending dates.

Press "R" if you want the report date specified when the report is generated to be used for the date. The text "RptDate" will be displayed in the date field indicating that the report date will be used for the date field.

Press "F" if you want the first day of the month specified for the report date to be used as the beginning date. The text "FirstDay" will be displayed in the date field indicating that the first day of the month specified for the report date will be used for the date field.

Note: Use of "R" and "F" in the date fields as the beginning or ending date allows you to run the report every month without having to edit the report writer definition.

Bill Code	Select whether you want to include billable transactions, non-billable transactions or all transactions.

	All	Select **All** if you want both billable and non-billable transactions selected.
	Billable	Select **Billable** if you want only billable transactions selected.
	Non-Billable	Select **Non-Billable** if you want only non-billable transactions selected.

Hold/Print	Select whether you want all transactions, transactions with a status of Print and Save or transactions with a status of Hold.

	All	Select **All** if you want all transactions included regardless of the Status field.
	Print/Save	Select **Print/Save** if you want all transactions included that have a status of Print or Save. Transactions that have a status of Update will also be included.

Note: Payments cannot have a status of **Save**.

	Hold	Select **Hold** if you want only transactions that have a status of Hold.

Transactions	Select whether you want work-in-process transactions only, archived transactions only or both work-in-process and archived transactions.

	WIP	Select **WIP** if you want only work-in-process transactions selected.
	Archive	Select **Archive** if you want only archived transactions selected.
	Both WIP and Archive	Select **Both WIP and Archive** if you want both work-in-process and archived transactions selected.

Note: If you select **Archive** or **Both WIP and Archive**, you will be allowed to specify a beginning and ending statement date.

Tcode	Maximum of 3 characters (transaction code number or alpha code) for each field. Enter the range of transaction codes you want used to select the transactions to include.

Task Based Billing Note: Task based billing transactions do not include a transaction code. Instead, each Activity/Expense code is assigned a transaction code in the Task Code program. If a range of transaction codes is specified, the system looks to see whether the transaction code assigned to the Activity/Expense code falls within the range to determine if the task based billing transaction should be included.

The button can be used to open the Tcode Lookup window that allows you to view a list of transaction codes and select any transaction code by double-clicking it.

Right-clicking this field displays a shortcut menu that allows easy access to the Tabs3 Transaction Code program for adding or editing purposes.

Timekeeper	Maximum of 3 characters (timekeeper number or initials) for each field. Enter the range of timekeepers you want used to select the transactions to include. The timekeepers specified here correspond to the timekeeper shown on the

transaction rather than the primary, secondary or originating timekeeper assigned to the client (e., this timekeeper represents the working timekeeper range).

The ⌄ button can be used to open the Timekeeper Lookup window that allows you to view a list of timekeepers and select any timekeeper by double-clicking it.

Right-clicking this field displays a shortcut menu that allows easy access to the Tabs3 Timekeeper program for adding or editing purposes.

Timekeeper Level   Maximum of 1 digit (1-9). Enter the range of timekeeper levels you want included. The timekeeper level numbers specified here correspond to the timekeeper level assigned to timekeepers in the timekeeper file.

Category   Maximum of 3 digits (1-999). Enter the range of category numbers you want included. The category numbers specified here correspond to the category shown on the fee transaction rather than the category assigned to the client in the client data entry program.

The ⌄ button can be used to open the Category Lookup window that allows you to view a list of categories and select any category by double-clicking it.

Right-clicking this field displays a shortcut menu that allows easy access to the Tabs3 Category program for adding or editing purposes.

Cost Type   Maximum of 1 digit (0-9). Enter the range of Cost Types you want included. The cost type range does not apply to finance charge credit transactions.

Statement Date   Enter the beginning and ending statement date for the transactions you want selected. This field is available only when **Archive** or **Both WIP and Archive** are selected for Transactions.

The default beginning and ending statement date is "mm/dd/yyyy". If you want all statements selected, accept the default beginning and ending statement dates.

Press "R" if you want the report date specified when the report is generated to be used for the date. The text "RptDate" will be displayed in the date field indicating that the report date will be used for the date field.

Press "F" if you want the first day of the month specified for the report date to be used as the beginning statement date. The text "FirstDay" will be displayed in the date field indicating that the first day of the month specified for the report date will be used for the date field.

Note: Use of "R" and "F" in the date fields as the beginning or ending statement date allows you to run the report every month without having to edit the report writer definition.

Archive Note: When including archived transactions, you will also be asked to specify a beginning and ending transaction date. Only those archived transactions that are included in both date ranges specified will be selected.

User ID   Maximum of 8 characters. Enter the range of User IDs you want included. A range of User IDs is based on alphabetic order of User ID.

The ⌄ button can be used to open the User Lookup window that allows you to view a list of users and select any user by double-clicking it.

Receipt Allocation Type   **Note:** This selection parameter is available only for field #'s 77-79. The Firm, Primary Timekeeper, Secondary Timekeeper and Originating Timekeeper options are available only for field #79.

Enter one of the following designations: Fees, Cost Expenses, Cost Advances, Finance Charge, Fee Sales Tax, Expense Sales Tax, Advance Sales Tax, Primary Timekeeper, Secondary Timekeeper, Originating Timekeeper or Firm.

If **Fees** is selected, you will be asked to specify a beginning and ending timekeeper. The default beginning timekeeper is 0. When **Fees** is selected, the Include Fee Compensation Amounts check box is available.

If **Cost Expenses** or **Cost Advances** is selected, you will be asked to specify a beginning and ending Cost Type.

If **Primary Timekeeper**, **Secondary Timekeeper** or **Originating Timekeeper** is selected, you will be asked to specify a beginning and ending timekeeper range and/or timekeeper level range.

Note: The Receipt Allocation information (field#'s 76-79) is retrieved from the statement detail file whereas the billed fields (field #'s 86-107) are retrieved from the client ledger file.

Include Fee Compensation Amounts

The **Include Fee Compensation Amounts** check box is only available when the **Receipt Allocation Type** field is set to **Fees**.

Select this check box to report the amount paid less any primary, secondary, and originating allocations.

Clear this check box to report the full amount allocated to the specified timekeeper(s) without regard to fee compensation amounts.

Receipt Allocation Period

Enter the time period of payment transactions to include. Valid time periods for this report include:

> All
> Today
> Current Reporting Month
> Current Calendar Month
> Current Reporting Month Prior Year
> Current Calendar Month Prior Year
> Current Quarter
> Current Reporting Year
> Current Calendar Year
> Prior Reporting Month
> Prior Calendar Month
> Prior Reporting Month Prior Year
> Prior Calendar Month Prior Year
> Prior Quarter
> Prior Reporting Year
> Prior Calendar Year
> Custom

When any time period (with the exception of **Custom**) is selected, the date range currently associated with that period will also be displayed. The report definition stores the period, rather than the date, and when run will use the current date range that is associated with that time period.

If **Custom** is selected, a specific date range must also be specified. The report definition stores the date range specified and will always use that date as the default when running the report.

Note: This selection parameter is available only for field #'s 76-79, and 108.

Formulas

A formula is a column in a Tabs3 Report Writer definition whose field is defined as #132. A formula field can have a maximum of 70 characters. Upper case or lower case characters can be used in a formula line. There are two types of formulas: math formulas and string formulas.
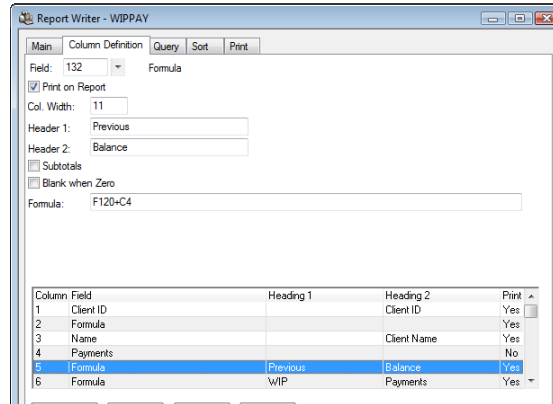
Fig. 3-9, Example of a Formula Field

Math Formulas

Each Tabs3 field and column is categorized as one of the following types of fields: alphanumeric, numeric, date or decimal. Only decimal fields/columns can be used in math formulas. Alphanumeric, numeric (i.e., non-decimal) and date fields cannot be used in math formulas.

Operators that can be used in a formula field include:

Addition +   An arithmetic operator permitting addition.

Subtraction –   An arithmetic operator permitting subtraction.

Multiplication *   An arithmetic operator permitting multiplication.

Division /   An arithmetic operator permitting division.

Percentage %   An arithmetic operator that multiplies a number by 100 and then places a percent sign after the new number. For example, the calculation of 100/500 equals ".20". Applying the percentage arithmetic operator to the formula will display the result as "20%". The formulas "100/500%" and "(100/500)%" will both yield the same results. Percentages are rounded to the nearest hundredth of a percentage. For example, ".18767%" would become "18.77%".

Note: If a multiplication or division operator is used in a formula column that is totaled, then the total is calculated according to the formula. For formula columns that do not use a multiplication or division operator and are totaled, the total is calculated as a "running" total.

Columns and fields are referred to by a single letter designator © for columns and F for fields) followed by the column number or field number. For example, column #7 would be referred to as C7 and field #63 would be referred to as F63.

Previously defined columns can be used in a formula. For example, if you are defining Column 8, you can use columns 1 through 7 in the formula. The following is an example of a formula line:

C2 + C7

Note: Columns that are greater than the column number of the formula column cannot be used in the formula. For example, if you are defining Column 8, you cannot use C10 in the formula.

The F3 key can be used to display a list of defined columns when the cursor is in the **Formula** field.

You can also use a field in a formula. For example, let's say you want to use the Balance Due (field #120) in your formula but the balance due is not used in a previously defined column. If you are defining Column 8, you could enter:

F120 - C6

The F2 key can be used to display a list of available fields when the cursor is in the **Formula** field.

Note: Using a field vs. a column that is defined using the same field may not yield the same values. This is due to the fact that when defining work-in-process, billed and write-up/write-down columns, you have the ability to specify selection parameters such as beginning and ending date, tcode, timekeeper, cost type, etc. This note applies to field #'s 76-112.

Note: If a "field" and the multiplication or division operator are used in a formula, the column will not total. You can work around this by defining the field as a column (using a column number less than the column number of the formula column) that does not print. Use the column in your formula instead of the field.

Order of Operation

The order of calculations performed within a formula is as follows:

1. All calculations within parentheses are performed first. In cases of nested parentheses, calculations within the innermost parentheses are performed first.

2. All calculations outside of parentheses are performed from left to right. There is no hierarchy of operators. For example, in the calculation 4 + 3 * 2, the Report Writer calculates the answer as 14, not 10. If you want the answer to be calculated as 10, you would need to insert parentheses, 4 + (3 * 2).

String Formulas (or Alpha Formulas)

String formulas can be used in a formula field. String formulas can be used when you want to concatenate fields and/or text into one field. An excellent example of this is if you are extracting name and address information for a database file. Your database file may require the city and state in the same field, but Tabs3 stores both the city and state as separate fields.

Only field references are allowed in string formulas; column references are not allowed. Alphanumeric fields, date fields and numeric fields can be used in string formulas; however, decimal fields cannot be used.

When using multiple Tabs3 fields in a string formula, you cannot mix "types." For example, you cannot include an alphanumeric field and a numeric field in the same formula. You cannot include a numeric field and a date field in the same formula. You can however, include an alphanumeric field and a date field in the same formula.

You can enter your own free form text as long as it is delimited with single quotes. For example, if you wanted to place a comma followed by a space between 2 fields, you would enter: ','

The addition operator (+) is the only operator that can be used in string formulas.

In the example where you want to combine City and State into one column, you would enter a formula of:

F8+ ',' +F9

This formula will extract the City, insert a comma and one blank space followed by the State.

The Tabs3 Report Writer removes any blank spaces at the end of a field. For example, if the city of "OMAHA" (5 characters) is used (City is a 20 character field), the remaining 15 characters are truncated and are not extracted.

Spacer Columns

After displaying your report or printing it out for the first time, you may want to add a "spacer" column. A "spacer" column is a column that consists of spaces only. All numeric columns are right justified and all alphanumeric columns are left justified. Spacer columns are particularly useful when inserted between a numeric column and an alphanumeric column.

To add a spacer column, you must add or insert a formula column (field #132). Designate the width of the spacer column in the **Column Width** field. In the formula line, enter a single quote followed by a blank space followed by another single quote, (i.e., ' ').

An example of a spacer column is shown in the following figure.
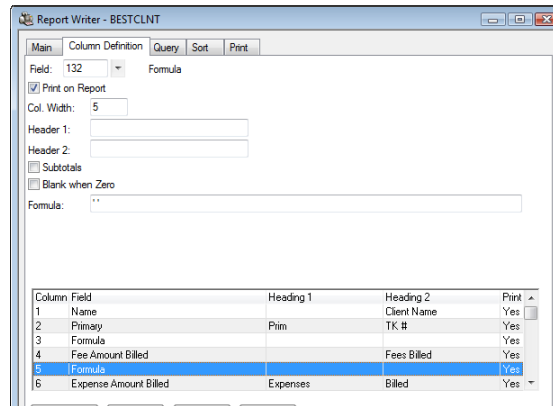
Fig. 3-10, Example of a "Spacer" Column

Note: The Tabs3 Report Writer automatically places 1 blank space between columns. If you currently have one blank space between two columns and you add a spacer column of 3 characters, you will end up with 5 characters between the two columns (i.e., there is a blank space both before and after the spacer column).

Query Tab

The **Query** tab of the Report Writer window is used to specify selection criteria that are used to determine whether or not the client or record should be included on the report. Up to 40 queries can be defined for each definition. For example, you can state that you only want clients with a primary timekeeper of 1 included on the report. Or, you can state that you only want to include clients with a balance due that is greater than $200.00. Or you can state that you only want clients included that have work-in-process less than $500.00. Or, you can stipulate that you only want clients included that meet all of the aforementioned criteria.
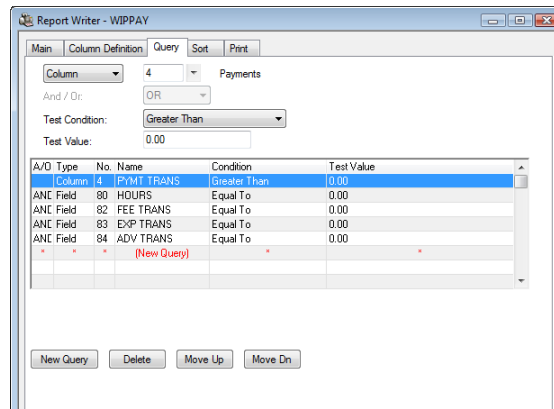
Fig. 3-11, Query Tab

Note: This tab is optional. If you want all clients selected, then simply skip this tab.

Note: You also have the ability to change or add queries at the time you print the report. The changes made at that time are temporary and are not saved to the report definition file.

As each query is added, it is shown in the display of queries in the lower portion of the window. Each line in the display of queries represents a single query. To modify an existing query, simply highlight the desired query and the associated fields with that query will be displayed in the upper portion of the window.

New Query	The **New Query** button can be used to define a new query. You can also click on the (New Query) row in the query display to add a new query. To insert a query between existing queries, add a new query and then use the **Move Up** button to move the query to the desired position.
Delete	The **Delete** button can be used to delete the highlighted query. Any subsequent queries will be moved up one position.
Move Up	The **Move Up** button or Ctrl+Up can be used to move the highlighted query up one row.
Move Down	The **Move Down** button or Ctrl+Down can be used to move the highlighted column down one row.

Fields on the Query Tab

The following fields are found on the **Query** tab.

Field/Column	Select **Field** or **Column** and then select the desired field or column.

Column	Select **Column** if you are going to use a column for selection purposes.
Field	Select **Field** if you are going to use a field for selection purposes.

The ability to use a field as a selection parameter allows you to define selection criteria on fields that are not included in the report. For example, you may only want to include clients that have a zip code greater than 50000 and less than 60000 on your report, but not include the zip code field as a column on your report.

After selecting field or column, the ⌄ button can be used to open the Field or Column Lookup window that allows you to view a list of fields/columns and select a field/column by double-clicking it.

And/Or	Select **And** or **Or** for the selection criteria. This field is not available for the first query.

	And	Select **And** if you want the previous criterion and the current criterion to be true in order for the client to be selected.
	Or	Select **Or** if you want the previous criterion or the current criterion to be true in order for the client to be selected.

> **Note:** Multiple selection criteria are tested in the order they are presented. You cannot assign priority to a selection criterion or a group of selection criteria.

Test Condition	You can select one condition per criterion. The following test conditions are available:

- ❑ Greater Than
- ❑ Greater Than or Equal To
- ❑ Equal To
- ❑ Less Than
- ❑ Less Than or Equal To
- ❑ Not Equal To
- ❑ Contains

> **Note:** The "Contains" condition can only be used when the column or field you have selected is alphanumeric (i.e., it cannot be used when the column/field # selected is a date, decimal or numeric column/field).

> **Note:** The "Equal To" condition, when used with an alphanumeric field, will return records whose field starts with the specified Test Value.

Test Value	The information that can be entered in the **Test Value** field depends on whether the Field/Column specified is alphanumeric, numeric or date. Enter the value you want used for comparison purposes.

	Alphanumeric	Alphanumeric strings are allowed when the field or column is alphanumeric. Maximum of 30 characters for alphanumeric columns or fields. Check box fields are also treated as alphanumeric fields (i.e., selected = "Y" and cleared = "N"). For example, if you wanted to select clients whose **Inactive** check box is selected, you would specify Field 50 EQUAL to Y (or Field 50 CONTAINS Y).
	Numeric	Maximum of 11 characters (including decimal point and minus sign if used) for numeric columns or fields.
	Date	Select Report Date or Other Date. If you select Other Date, you will be allowed to specify the desired date. An mm/dd/yyyy format is used for date fields.

Sort Tab

The **Sort** tab of the Report Writer window is used to define sorting and subtotaling for the report. This tab lets you select sorting orders, whether you want to subtotal and if so lets you specify subtotal descriptions and headings. You can also select whether you want to print subtotals only and select an ascending or descending sort order.
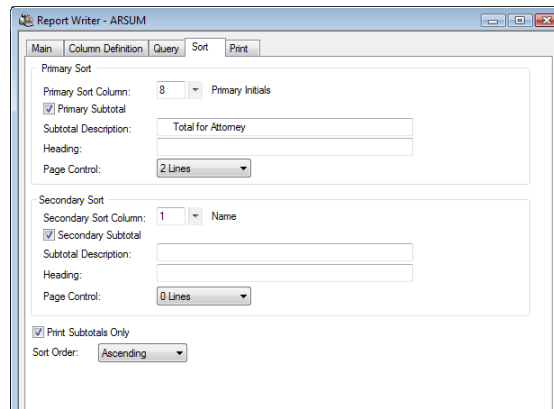
Fig. 3-12, Sort Tab

Note: This tab is optional. If no sorting is selected, then the clients will be listed in random order.

Primary Sort

Primary Sort Column   Maximum of 3 digits (blank or 1-200). Enter the defined column that you want

the report sorted on. The button can be used to open the Column Lookup window that allows you to view a list of columns and select a column by double-clicking it.

For example, if you select a Primary Sort Column of Originating Timekeeper, then all of originating timekeeper #1's clients will print first, followed by all of originating timekeeper #2's clients, etc.

If you want the report to be sorted, you must select a defined column. You cannot sort on a field that has not been defined as a column. If no column is selected, the report will be sorted by the first column.

Hint: If you want to sort the report on a field that is not a defined column, simply add a column to the report and clear the **Print on Report** check box. For example, if you want the report output in alphabetical order by Name Search and the **Name Search** field is not a defined column, then you must define a column that uses the **Name Search** field (field #4) and clear the **Print on Report** check box.

Note: When selecting an alpha column as the Primary Sort Column, only the first 30 characters are used for sorting.

The example in Fig. 3-13 is a simple accounts receivable report. A primary sort of client name (last name/first name) was selected. No primary subtotal was selected. The **Print Subtotals Only** check box (page 33) was cleared. An ascending sort order was selected.

```
Date: 06/01/2014      Accounts Receivable Report        Page: 1
                         Burns & Jensen, P.C.

Client Name                                       Balance Due
============                                       ===========
ABC Insurance Company                                3,188.52
Ace Manufacturing Company                            4,653.97
Barrett/Karen                                        2,516.91
Dawson/Charles L.                                      824.60
First National Bank and Trust of Lincoln             3,625.12
Harrison Investments                                   547.58
Harrison/Bradley                                       547.57
Jefferson Insurance Company                          4,516.24
Kiltzer/George                                       1,733.90
Lutz/Jody                                            1,339.82
Lyons/Mr. & Mrs. Art                                   217.50
Martin/Mary L. & Fred J.                              -100.00
McBride/John                                           416.00
Richardson/Harold                                    2,740.05
                                                  ===========
Grand Totals                                        26,767.78
```

Fig. 3-13, Report using a Primary Sort Column
of Client Name in Ascending Order.

Primary Subtotal

Select the **Primary Subtotal** check box if you want a subtotal printed for each primary sort. For example, if you select the Primary Subtotal check box and the Primary Sort Column is Originating Timekeeper, then a subtotal line will print for each originating timekeeper's clients. A subtotal line consists of the 30 character user-defined Primary Subtotal Description followed by a 30 character sort identifier followed by subtotals for the appropriate columns. The sort identifier is determined by the field you are sorting on. For example, if you are sorting on category, then the category number is the sort identifier. If you are sorting by Category Description, then the first 30 characters of the category description is the sort identifier. If you are sorting by client name, then the first 30 characters of the client name is the sort identifier. If you select this check box, you will be allowed to specify the Primary Subtotal Description, Heading and Page Control.

Note: If you select the **Primary Subtotal** check box, then subtotals will print for columns that have their **Subtotal** check box selected. If the column's Subtotal check box is not selected, then no subtotal will print for that column.

Primary Subtotal Description

Maximum 30 characters. Enter the description you want printed on the subtotal line. If the subtotal is associated with a field that is a number, the Report Writer will automatically print the number after the subtotal description. For example, if the Primary Sort Column is Category, you might want to enter "Subtotal for Category #" as the Primary Subtotal Description. The Report Writer will automatically enter the category number after the description on each subtotal line.

This field is available only if the **Primary Subtotal** check box is selected.

An example of a Primary Subtotal Description line can be seen in Fig. 3-15.

The report in Fig. 3-14 is based on the same report in Fig. 3-13 with the following differences. Two columns have been added to the report: Category and Category Description. The Category column is set up to not print on the report. The Category Description and Balance Due columns both have their Subtotals check box selected on the Column Definition tab. On the Sort tab, a "Primary Sort Column" of Category is selected. The "Primary Subtotal" check box is selected. The Subtotal Description is "Subtotal For Category". The automatic sort identifier is the category number. A Secondary Sort Column is not selected. The "Print Subtotals Only" check box is selected. An ascending sort order is selected.

```
Date: 06/01/2014        Accounts Receivable Report        Page: 1
                           Burns & Jensen, P.C.

Client Name                    Category Description           Balance Due
==========                     ====================           ===========
Subtotal for Category   1 Personal Injury                        1,612.80

Subtotal for Category   5 Wills/Trusts/Estates                   3,489.72

Subtotal for Category  10 Workers' Compensation                  3,240.02

Subtotal for Category  15 Probate                                4,013.12

Subtotal for Category  20 Tax Law                                2,957.55

Subtotal for Category  25 Real Estate                            3,612.06

Subtotal for Category  35 Family Law                              -100.00

Subtotal for Category  40 Business Law                           7,942.51
                                                             ==========
Grand Totals                                                    26,767.78
```

Fig. 3-14, Report with a Primary Sort Column of
Category using the Print Subtotals Only option.

| **Primary Heading** | Maximum 30 characters. You have the ability to specify a heading to be printed prior to each primary sort grouping. |

The Primary Heading Line consists of the Primary Heading *("Clients for Primary Attorney")* followed by the

The Primary Subtotal Line consists of the Primary Subtotal Description *("Total for Primary Attorney")* followed by the sort identifier *(Primary Attorney Name)* followed by any subtotals for columns

```
Clients for Primary Attorney Daniel H. Brady
     Barrett/Karen                          2,516.91
     Kiltzer/George                         1,733.90
     Lyons/Mr. & Mrs. Art                     217.50
     Harrison Investments                     547.58
     Harrison/Bradley                         547.57
                                           ---------
Total for Primary Attorney Daniel H. Brady   5,563.46
```

Fig. 3-15, Examples of a Primary Heading Line
and a Primary Subtotal Line.

Note: The Primary Heading line will print in addition to the subtotal line if you select the **Print Subtotals Only** check box. Therefore, you most likely won't want a Primary Heading if you print subtotals only.

| **Primary Page Control** | Enter 0-9 Lines or Page Eject. This option allows you to assign up to 9 blank lines or a page break after each primary sort grouping. |

| **0 Lines** | Select **0 Lines** if you do not want any blank lines after each primary sort grouping. |

| **1 thru 9 Lines** | Select **1-9 Lines** to designate how many blank lines you want to print after each primary sort grouping. |

| **Page Eject** | Select **Page Eject** if you want a page break to occur after each primary sort grouping. When using a page break, grand totals will print on a page by itself. |

Secondary Sort

| **Secondary Sort Column** | Maximum of 3 digits (0-200). Enter the defined column that you want the report sorted on within the primary sort. The ⌄ button can be used to open the Column |

Lookup window that allows you to view a list of column and select a column by double-clicking it.

For example, if you select a Primary Sort Column of Originating Timekeeper and a Secondary Sort Column of Category, then all of originating timekeeper #1's clients will print first. The clients for originating timekeeper #1 will print in category order. Then, all of originating timekeeper #2's clients will print next in category order. Then, all of originating timekeeper #3's clients will print next in category order, etc.

Leave this field blank if you do not want the report to be sorted on a Secondary Sort Column. You cannot sort on a field that has not been defined as a column.

Hint: If you want to sort the report on a field that is not a defined column, simply add a column to the report and clear the **Print on Report** check box.

Note: When selecting an alpha column as the Secondary Sort Column, only the first 30 characters are used for sorting.

Secondary Subtotal	Select the **Secondary Subtotal** check box if you want a subtotal printed for each secondary sort. For example, if you select the **Secondary Subtotal** check box and the Secondary Sort Column is Category, then a subtotal line will print for each category within each primary sort. If you select this check box, you will be allowed to specify the Secondary Subtotal Description, Heading and Page Control.

Note: If you select the **Secondary Subtotal** check box, then subtotals will print for columns that have their Subtotal check box selected. If the column's Subtotal check box is not selected, then no subtotal will print for that column.

Secondary Subtotal Description	Maximum 30 characters. Enter the description you want printed on the subtotal line. If the subtotal is associated with a field that is a number, the Report Writer will automatically print the number after the subtotal description. For example, if the Secondary Sort Column is Category, you might want to enter "Subtotal for Category #" as the Secondary Subtotal Description. The Report Writer will automatically enter the category number after the description on each subtotal line. If your secondary sort column is Category Description, the Report Writer will automatically enter the first 30 characters of the category description after your subtotal description.

This field is available only if the **Secondary Subtotal** check box is selected.

Secondary Heading	Maximum 30 characters. You have the ability to specify a heading to be printed prior to each secondary sort grouping.
Secondary Page Control	Enter 0-9 Lines or Page Eject. This option allows you to assign up to 9 blank lines or a page break after each secondary sort grouping.

0 Lines	Select **0 Lines** if you do not want any blank lines after each secondary sort grouping.
1 thru 9 Lines	Select **1-9 Lines** to designate how many blank lines you want to print after each secondary sort grouping.
Page Eject	Select **Page Eject** if you want a page break to occur after each secondary sort grouping.

The report in Fig. 3-16 is based on the same report in Fig. 3-13 and 3-14 with the following differences. A Primary Sort of category and a Secondary Sort of client name were selected. The "Primary Subtotal" check box was selected. The Subtotal Description is "Subtotal for Category". *(Hint: Three blank spaces were entered before the text "Subtotal for Category" in the Primary Subtotal Description field allowing the subtotal line to*

indent for easier reading.) The sort identifier is the category number. The "Secondary Subtotal" check box was selected. The "Print Subtotals Only" check box was selected. Ascending sort orders were selected.

```
Date: 06/01/2014          Accounts Receivable Report          Page: 1
                             Burns & Jensen, P.C.

Client Name                   Category Description        Balance Due
===========                   ====================        ===========
Ace Manufacturing Company     Personal Injury                4,653.97
Jefferson Insurance Company   Personal Injury                4,516.24
                                                           ---------
    Subtotal for Category   1  Personal Injury               9,170.21

Kiltzer/George                Wills/Trusts/Estates           1,733.90
Lutz/Jody                     Wills/Trusts/Estates           1,339.82
McBride/John                  Wills/Trusts/Estates             416.00
                                                           ---------
    Subtotal for Category   5  Wills/Trusts/Estates          3,489.72

ABC Insurance Company         Probate                        3,188.52
Dawson/Charles L.             Probate                          824.60
                                                           ---------
    Subtotal for Category  15  Probate                       4,013.12

Lyons/Mr. & Mrs. Art          Tax Law                          217.50
Richardson/Harold             Tax Law                        2,740.05
                                                           ---------
    Subtotal for Category  20  Tax Law                       2,957.55

Barrett/Karen                 Real Estate                    2,516.91
Harrison Investments          Real Estate                      547.58
Harrison/Bradley              Real Estate                      547.57
                                                           ---------
    Subtotal for Category  25  Real Estate                   3,612.06

Martin/Mary L. & Fred J.      Family Law                      -100.00
                                                           ---------
    Subtotal for Category  35  Family Law                     -100.00

First National Bank and Trust Business Law                   3,625.12
                                                           ---------
    Subtotal for Category  40  Business Law                  3,625.12

                                                           ==========
Grand Totals                                                26,767.78
```

Fig. 3-16, Report with a Primary Sort of Category
and a Secondary Sort of Client. The Primary Subtotal
is set to "Y" and the Secondary Subtotal is set to "N".

Remaining Fields

Print Subtotals Only   Select this check box if you only want subtotals and totals to print but do not want the detail for each client to print.

Clear this check box if you want all of the selected information for each client to print in addition to the subtotals and totals.

The report in Fig. 3-17 is based on the same report in Fig. 3-16 with the following differences. Only clients with a category of 1 through 15 are included on the report. A Primary Sort of category and a Secondary Sort of originating timekeeper initials were selected. The "Primary Subtotal" check box was selected. The Subtotal Description is "Total For Category". The "Secondary Subtotal" check box was selected. The Subtotal Description is "Total for Attorney". The sort identifier is the originating attorney's initials. The "Print Subtotals Only" check box was selected. Ascending sort orders were selected.

```
Date: 06/16/2014        Accounts Receivable Report              Page: 1
                            Burns & Jensen, P.C.

Client Name                                              Balance Due
===========                                              ===========
Subtotal for Orig. Attorney MLJ                             1,612.80
                                                           ---------
    Total for Category   1 Personal Injury                  1,612.80


Subtotal for Orig. Attorney DHB                             3,073.72
Subtotal for Orig. Attorney RJB                               416.00
                                                           ---------
    Total for Category   5 Wills/Trusts/Estates             3,489.72


Subtotal for Orig. Attorney MLJ                             3,240.02
                                                           ---------
    Total for Category  10 Workers' Compensation            3,240.02


Subtotal for Orig. Attorney MLJ                             3,188.52
Subtotal for Orig. Attorney RJB                             2,309.48
                                                           ---------
    Total for Category  15 Probate                          5,498.00


                                                           ===========
Grand Totals                                               13,840.54
```

Fig. 3-17, Report using a Primary Sort of Category
and a Secondary Sort of Originating Timekeeper Initials.
The Print Subtotals Only option is used.

Sort Order   Select **Ascending** or **Descending**.

Ascending   Select **Ascending** if you want the sort orders to be in ascending
                   order. For example, if you want the clients to print in
                   alphabetical order from A to Z, you would select Ascending.

Descending   Select **Descending** if you want the order to be in descending
                   order. For example, if you want the clients to be printed in order
                   based on Balance Due with the clients having the largest
                   balance due printing first, then you would select Descending.

Note: You cannot mix ascending and descending orders when using both a
primary and secondary sort. Both sort orders will be either ascending or
descending.

Print Tab

The **Print** tab of the Report Writer window is used to print a report or a report writer definition listing.
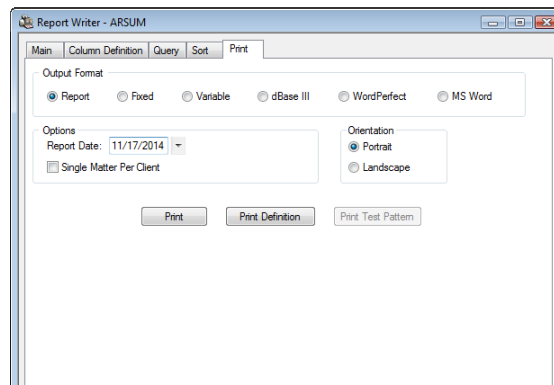
Fig. 3-18, Print Tab

Print	The **Print** button can be used to display the Print dialog box to print the report.
Print Definition	The **Print Definition** button can be used to display the Print dialog box to print a listing of the report writer definition.
Print Test Pattern	The **Print Test Pattern** button is not available in the Report Writer window.

The following fields are available on the **Print** tab.

Output Format

Select the desired output format. Report headings, report date, column headings, page numbers and subtotals are included only when using the Report format. Available output formats include:

| Report | Use the **Report** output format if you will be using Tabs3 Report Writer to create your final product. Headings and subtotals are included in the report. |
| Fixed | The **Fixed** output format is a sequential file that consists of one client record per line in a fixed field format. Each client record is separated by a line feed and carriage return. Each client record may consist of multiple fields. Each field for each client begins in the same character position for each client record. |

```
Mr. & Mrs. Art Lyons                        Route 2                      Davey  NE  68540
Mary L. & Fred J. Martin                    4200 Goldenrod Circle        Omaha  NE  68113
Karen Barrett                               3010 South 14th Street       Lincoln  NE  68510
John McBride                                Eastmont Towers              Lincoln  NE  68505
Jody Lutz                                   Rural Route #3               Greenwood  NE  68533
Jefferson Insurance Company                 American Charter Building    Lincoln  NE  68510-6330
Jefferson Insurance Company                 American Charter Building    Lincoln  NE  68510-6330
Jefferson Insurance Company                 American Charter Building    Lincoln  NE  68510-6330
Harold Richardson                           1548 West 57th Street        Rochester  NY  14603-8409
George Kiltzer                              3342 South 73rd Street       Lincoln  NE  68506
First National Bank and Trust of Lincoln    Platte Valley Building       Lincoln  NE  68510
Charles L. Dawson                           27550 Cottonwood Drive       San Bernadino  CA  92408
Ace Manufacturing Company                   5th & Turner                 Malcolm  NE  68633
Ace Manufacturing Company                   5th & Turner                 Malcolm  NE  68633
ABC Insurance Company                       3232 Farnam Street           Omaha  NE  68102
```

Fig. 3-19, Example of a Fixed Length Field Output Format

| Variable | The **Variable** output format is also a sequential file that consists of one client record per line but in a variable field format. Each client record may consist of multiple fields. Each field within a client record begins following the end of the previous field. Each field is separated by a comma. Alphanumeric fields are enclosed within double quotation marks (to allow use of commas).

When comparing the Fixed Length Format and the Variable Length Format, the variable length format requires less storage space than the Fixed Length Format because the blank spaces are not extracted. However, the format that you select will be dependent upon the requirements of the other software program that you will be using in conjunction with the file you are extracting. |

```
"Mr. & Mrs. Art Lyons","Route 2","Davey  NE  68540"
"Mary L. & Fred J. Martin","4200 Goldenrod Circle","Omaha  NE  68113"
"Karen Barrett","3010 South 14th Street","Lincoln  NE  68510"
"John McBride","Eastmont Towers","Lincoln  NE  68505"
"Jody Lutz","Rural Route #3","Greenwood  NE  68533"
"Jefferson Insurance Company","American Charter Building","Lincoln  NE  68510-6330"
"Jefferson Insurance Company","American Charter Building","Lincoln  NE  68510-6330"
"Jefferson Insurance Company","American Charter Building","Lincoln  NE  68510-6330"
"Harold Richardson","1548 West 57th Street","Rochester  NY  14603-8409"
"George Kiltzer","3342 South 73rd Street","Lincoln  NE  68506"
"First National Bank and Trust of Lincoln","Platte Valley Building","Lincoln  NE  68510"
"Charles L. Dawson","27550 Cottonwood Drive","San Bernadino  CA  92408"
"Ace Manufacturing Company","5th & Turner","Malcolm  NE  68633"
"Ace Manufacturing Company","5th & Turner","Malcolm  NE  68633"
"ABC Insurance Company","3232 Farnam Street","Omaha  NE  68102"
```

Fig. 3-20, Example of a Variable Length Output Format File
(Also known as a "comma/quote" file)

Note: The use of double quotes in Tabs3 data may cause problems for the software that will be used to work with the variable length file.

dBase III

The **dBase III** output format is used for files that will be imported into dBase III. You may want to specify a file extension of "DBF" when exporting the information. After creating a dBase III Output Format file, simply start dBase III and "USE" the dBase file.

Note: Appendix B in the Tabs3 Report Writer manual contains a list of field names that will be used for a dBase III Output Format file.

WordPerfect

The **WordPerfect** output format is used for files that will be imported into WordPerfect. Each client record is separated by a Merge E (^E followed by a hard return). Each field is separated by a Merge R (^R).

```
Richardson/Harold^R
1548 West 57th Street^R
Apartment #816^R
^R
Rochester  NY  14603-8409^R
^E
McBride/John^R
Eastmont Towers^R
2920 Northwest Greenbriar Lane^R
^R
Lincoln  NE  68505^R
^E
Martin/Mary L. & Fred J.^R
4200 Goldenrod Circle^R
^R
^R
Omaha  NE  68113^R
^E
```

Fig. 3-21, An Example of a WordPerfect
Output Format File

Note: Later versions of WordPerfect will work with these codes. Additional information regarding how to import WordPerfect Mail Merge files can be found in Knowledge Base article R11078, "How to Import WordPerfect Mail Merge Files for Label Creation" *(www.support.Tabs3.com)*.

MS Word

The **MS Word** output format is used for mail-merge files that will be imported into Microsoft Word. The first record in the file is a header record which includes field names for each of the fields. Each subsequent line consists of a single client record in a variable field format. Each field is separated by a comma and is enclosed within double quotation marks.

Note: Appendix C in the Tabs3 Report Writer manual contains a list of field names that will be used for an MS Word Output Format file.

Orientation

Select which direction you want the report printed.

Portrait	Portrait orientation is taller than it is wide. When you hold a page that is printed using a portrait orientation, you hold the page with the long edges to the sides.
Landscape	Landscape orientation is wider than it is tall. When you hold a page that is printed using a landscape orientation, you hold the page with the short edges to the sides. When using Automatic Font Selection, printing with landscape orientation will result in a larger font.

Other Fields

Report Date
Uses mm/dd/yyyy format. The Report Date is printed left justified in the first heading line if you selected the Report Output Format. The Report Date is also used as a cut-off date for work-in-process payments and as a basis for ageing (if you have used work-in-process payments or accounts receivable figures for the report). The Report Date is also used as a cut-off date whenever a Date of "R" (report date) was entered for work-in-process transactions, archive transactions, or ledger records. The Report Date is used as the Test Value (page 28) whenever the Report Date is specified for a query.

Single File Per Client
This option was designed to be used for mailing lists and labels where you may want a client to print only once regardless of how many files or matters the client has. If your report includes any subtotaled fields, all files for a client will be included in the subtotal when using this option. Also, if you are using formulas, all the files are summed and the formulas are then applied. However, if you include subtotals and this option is cleared, the formula is applied to each file and then the results are summed. Report totals may vary depending on how this option is set due to how calculations are performed. If you want to include subtotaled fields, you may want to use the **Print Subtotals Only** check box on the **Sort** tab to print the client only once.

Select this check box if you want only one file per client to print.

Clear this check box if you want all files for each client to print.

Chapter 4
Forms Writer Window

Forms Writer Window

The Forms Writer window is shown after selecting a report via the Report Writer Manager and clicking the **Modify** or **New Form** buttons. The form definition name is shown in the title bar.

The Forms Writer window consists of the following tabs:

Note: Only the **Print** and **Query** tabs are shown when using the **Print** button via the Report Writer Manager.

Note: You may want to set up a special Windows printer for printing forms.

Main Tab
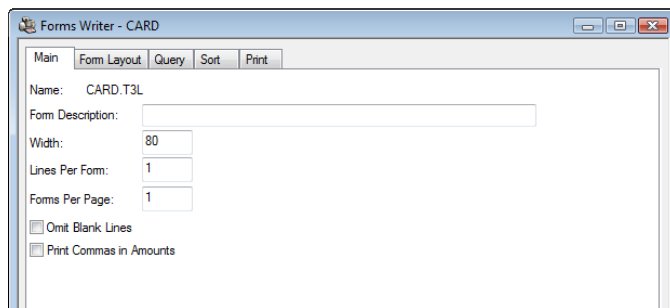
Fig. 4-1, Main Tab

The **Main** tab of the Forms Writer window is used to define the form description, the maximum width of the form, the number of printable lines per form, number of forms per page, if you want to omit blank lines and if you want to print commas in amounts.

Name	The Name is shown for reference purposes only and represents the file name where the form definition is stored. The form definition is named using the **New Form**, **Rename** or **Copy** buttons in the Report Writer Manager. The Name will be shown in the Report Writer Manager and in the title bar of the Forms Writer window.
Form Description	Maximum of 50 characters. Enter a description that describes the form's function. The Form Description will be displayed in the Report Writer Manager.

Width

Maximum of 3 digits (1-999). Enter the maximum form width measured in terms of columns of printing. The default width is 80. Calculate your form width by measuring the width of your form in inches from the point at which you want to begin printing to the point at which you want no printed line to exceed. Then, multiply that width by the number of characters per inch used by the selected printer.

When defining items for the lines of your form, if an item could cause the length of the line to exceed the form width, you will be allowed to specify whether you want the information truncated or wrapped onto the following line.

The Forms Writer prints using fixed pitch fonts.

Note: The Form Width begins printing after the Left Margin.

Examples

A mailing label that measures 1" x 3½" with a ⅛" margin on each side gives you a 3¼" printing area.

3¼ inches printing area
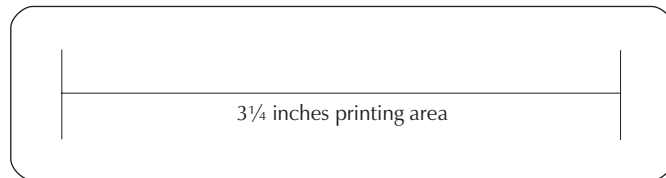
If you are printing in 12 characters per inch, you would set your form width at 39 (i.e., 3.25 x 12 = 39). If you are printing in 10 characters per inch, you would set your form width at 32 (i.e., 3.25 x 10 = 32.5). If you are printing in 16.7 characters per inch, you would set your form width at 54 (16.7 x 3.25 = 54.275).

If you are printing on mailing labels that are 1 x 4 inches, your printing area would be 3.75 inches if you allowed a ⅛" inch left and right margin. If you are printing in 12 characters per inch, you would set your form width at 45 (i.e., 3.75 x 12 = 45). If you are printing in 10 characters per inch, you would set your form width at 37 (i.e., 3.75 x 10 = 37.5). If you are printing in 16.7 characters per inch, you would set your form width at 62 (16.7 x 3.75 = 62.625).

Lines Per Form

Maximum of 3 digits (1-256). The default is 1. Determine the length from the top of your form to the top of the next form in inches. Then multiply the length of the form by 6. The Forms Writer always prints using 6 lines per inch.

Examples

If you are printing on mailing labels that are 1 x 3 inches, the Lines Per Form should be 6. However, you will only be able to print on 5 of those 6 lines.

If you are printing on mailing labels that are 1.5 x 4 inches, the Lines Per Form should be 9 (i.e., 6 x 1.5). However, you will only be able to print on 8 of those 9 lines.

If you are printing on a rotary index card that is 2 x 4 inches, the Lines Per Form should be 12 (i.e., 6 x 2).

Forms Per Page

Maximum of 3 digits (1-256). The default is 1. You can specify the number of forms on a page. This is particularly useful when printing to a laser printer.

For example, if you are printing on sheets of 1" x 3.5" mailing labels with 2 columns of 10 labels, the Forms Per Page would be set to 10. The Forms Writer cannot accommodate multiple columns of forms.

Note: The Tabs3 Client Labels program can print standard mailing labels on 2-across laser labels.

When printing on continuous form labels, the paper size of your Windows Printer must be configured for the size of the label. In this case, the Forms Per Page would be set to 1.

Note: The Top Margin applies to each page. Therefore, if there are 10 forms per page, the Top Margin applies to the top of each page.

Note: You may want to set up a special Windows printer for printing forms.

Omit Blank Lines Select this check box if you want the blank lines, due to empty Tabs3 data fields, to be "closed up." For example, if you are designing a mailing label form and have selected Address Lines 1 through 3 and line 3 isn't used for all clients, select this check box if you want the City/State/Zip line to print directly below the last printed address line. Otherwise, clear the check box if you want a blank line for Address Line 3 thus causing a blank line between the Address Line 2 and City/State/Zip lines.

Clear this check box if you want the blank lines for empty Tabs3 data fields to be printed.

Print Commas in Amounts Select this check box if you want commas to be used in amounts on the form.

Clear this check box if you do not want commas to be used in the amounts on the form.

Note: Use of commas in amounts may require wider field widths.

Form Layout Tab

The **Form Layout** tab of the Forms Writer window is where the "heart" of the form definition resides. This is the window that is used to define the items and lines on the form. Each line can consist of multiple items. Each form represents one client record. Each form can consist of up to 200 items.
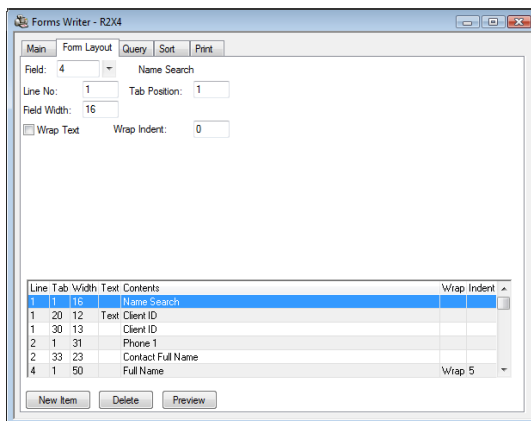
When defining a form definition in the Tabs3 Report Writer, an item consists of either a Tabs3 field or user defined text. User defined text can be specified by selecting field 133. For each item defined you are allowed to define the line number, the tab position and whether the item is a Tabs3 field or user defined text. If the item on the line exceeds the form width, you will be allowed to specify whether you want the item to wrap or be truncated. If you select to wrap the excess information, you will be asked to specify the number of characters you want the wrapped portion to be indented.

Fig. 4-2, Form Layout Tab

As each item is added, it is shown in the display of items in the lower portion of the window. Each line in the display of items represents a single item. To modify an existing item, simply highlight the desired item and the associated fields with that item will be displayed in the upper portion of the window. Items are automatically positioned within the lower portion of the window according to their Line Number and Tab Position.

New Item	The **New Item** button can be used to define a new item. You can also click on the (New Item) row in the item display to add a new item.
Delete	The **Delete** button can be used to delete the highlighted item. An item that has been defined as a sort item or selection criteria cannot be deleted.
Preview	The **Preview** button can be used to display the Form Preview window allowing you to visualize the placement of each item on the form.

Note: Blank lines are created by simply not defining an item for a line.

Archive Note: When specifying archive information, amounts for deleted clients are not accessible.

Note: Appendix A in the Tabs3 Report Writer manual includes a chart that defines each field.

Fields on the Form Layout Tab

Field	Maximum of 3 digits (1-133). Items are based on a data field or text. Select a number from "1-131" to specify a data field. Select field "133" if you want to define text. After selecting a field, the field name will be displayed to the right of the field number.
	The button can be used to open the Field Lookup window that allows you to view a list of fields and select a field by double-clicking it. Appendix A includes a list of all available fields.
Line No.	Maximum of 3 digits (1-256). Enter the line number on which you want the item you are defining to be printed.
	Multiple items can occur on one line.
Tab Position	Maximum of 3 digits (1-255). The default Tab position is "1." Enter the column position you want the item to begin printing on. As a general rule, you should use Tab Position 1 unless you want the line indented.
	The **Preview** button can be used to display the Form Preview window *(page 47)* allowing you to visualize the placement of each item on the form.
Field Width	Maximum of 3 digits (1-255). Enter the maximum width of the item. The field width is measured by the number of characters.
	The default field width is the width of the Tabs3 data field. When defining a text item, the default field width is 35. However, if the default width exceeds the overall Width specified on the **Main** tab, then the Field Width will default to the overall Width instead.
	You can accept the default field width or widen or narrow it as desired.
	Note: You may want to increase the default field width of "11" for numeric fields if you are working with large dollar amounts and are including commas in the amounts.
Wrap Text	Select this check box if you want the line to wrap onto the next line if it exceeds the form width. When "wrapping" excess line length, the portion from the last

space will be wrapped (i.e., "Alan Smith" will be wrapped as "Alan Smith" not "Alan Sm ith").

Clear this check box if you want the portion of the line that exceeds the form width to be truncated.

Wrap Indent

Maximum of 2 digits (0-20). You have the ability to define how many characters you want the wrapped portion of the line to indent. Enter the character position where you want the wrapped portion of the item to begin printing.

Text

Maximum 255 characters. Enter the text item you want printed on every form. This field is available only when selecting field #133 (text field).

Blank when Zero

This field determines whether a value of zero should print. In some instances, it may be desirable to only print the value if it is a non-zero amount.

Select this check box if you do not want an amount to print when the amount is zero.

Clear this check box if you always want an amount to print, even if it is zero.

Note: This field is displayed only if the item being defined is a decimal field.

Date

Enter the beginning and ending transaction date for the transactions you want selected.

The default beginning and ending date is "mm/dd/yyyy". If you want all transactions selected, accept the default beginning and ending dates.

Press "R" if you want the report date specified when the report is generated to be used for the date. The text "RptDate" will be displayed in the date field indicating that the report date will be used for the date field.

Press "F" if you want the first day of the month specified for the report date to be used as the beginning date. The text "FirstDay" will be displayed in the date field indicating that the first day of the month specified for the report date will be used for the date field.

Note: Use of "R" and "F" in the date fields as the beginning or ending date allows you to run the report or form every month without having to edit the definition.

Archive Note: When including archived transactions, you will also be asked to specify a beginning and ending statement date. Only those archived transactions that are included in both date ranges specified will be selected.

Note: If the column being defined is based on a Billed field, a Write-Up/Write-Down field, a Write Off field or one of the processed Payments fields (field #'s 86-112), the date is based on the date stored in the client ledger record.

Date Entered

Enter the beginning and ending date of entry for the transactions you want selected.

The default beginning and ending date is "mm/dd/yyyy". If you want all transactions selected, accept the default beginning and ending dates.

Press "R" if you want the report date specified when the report is generated to be used for the date. The text "RptDate" will be displayed in the date field indicating that the report date will be used for the date field.

Press "F" if you want the first day of the month specified for the report date to be used as the beginning date. The text "FirstDay" will be displayed in the date field indicating that the first day of the month specified for the report date will be used for the date field.

Note: Use of "R" and "F" in the date fields as the beginning or ending date allows you to run the report every month without having to edit the report writer definition.

Bill Code   Select whether you want to include billable transactions, non-billable transactions or all transactions.

> **All**   Select **All** if you want both billable and non-billable transactions selected.
>
> **Billable**   Select **Billable** if you want only billable transactions selected.
>
> **Non-Billable**   Select **Non-Billable** if you want only non-billable transactions selected.

Status   Select whether you want all transactions, transactions with a status of Print and Save or transactions with a status of Hold.

> **All**   Select **All** if you want all transactions included regardless of the Status field.
>
> **Print/Save**   Select **Print/Save** if you want all transactions included that have a status of Print or Save. Transactions that have a status of Update will also be included.
>
> **Hold**   Select **Hold** if you want only transactions that have a status of Hold.

Transactions   Select whether you want work-in-process transactions only, archived transactions only or both work-in-process and archived transactions.

> **WIP**   Select **WIP** if you want only work-in-process transactions selected.
>
> **Archive**   Select **Archive** if you want only archived transactions selected.
>
> **Both WIP   Select **Both WIP and Archive** if you want both
> and Archive**   work-in-process and archived transactions selected.

Note: If you select **Archive** or **Both WIP and Archive**, you will be allowed to specify a beginning and ending statement date.

Tcode   Maximum of 3 characters (transaction code number or alpha code) for each field. Enter the range of transaction codes you want used to select the transactions to include.

Task Based Billing Note: Task based billing transactions do not include a transaction code. Instead, each Activity/Expense code is assigned a transaction code in the Task Code program. If a range of transaction codes is specified, the system looks to see whether the transaction code assigned to the Activity/Expense code falls within the range to determine if the task based billing transaction should be included.

The   button can be used to open the Tcode Lookup window that allows you to view a list of transaction codes and select any transaction code by double-clicking it.

Right-clicking this field displays a shortcut menu that allows easy access to the Tabs3 Transaction Code program for adding or editing purposes.

Timekeeper   Maximum of 3 characters (timekeeper number or initials) for each field. Enter the range of timekeepers you want used to select the transactions to include. The timekeepers specified here correspond to the timekeeper shown on the transaction rather than the primary, secondary or originating timekeeper assigned to the client (i.e., this timekeeper represents the working timekeeper range).

The   button can be used to open the Timekeeper Lookup window that allows you to view a list of timekeepers and select any timekeeper by double-clicking it.

Right-clicking this field displays a shortcut menu that allows easy access to the Tabs3 Timekeeper program for adding or editing purposes.

Timekeeper Level   Maximum of 1 digit (1-9). Enter the range of timekeeper levels you want included. The timekeeper level numbers specified here correspond to the timekeeper level assigned to timekeepers in the timekeeper file.

Category   Maximum of 3 digits (1-999). Enter the range of category numbers you want included. The category numbers specified here correspond to the category shown on the fee transaction rather than the category assigned to the client in the client data entry program.

The button can be used to open the Category Lookup window that allows you to view a list of categories and select any category by double-clicking it.

Right-clicking this field displays a shortcut menu that allows easy access to the Tabs3 Category program for adding or editing purposes.

Cost Type   Maximum of 1 digit (0-9). Enter the range of Cost Types you want included. The cost type range does not apply to finance charge credit transactions.

Statement Date   Enter the beginning and ending statement date for the transactions you want selected. This field is available only when **Archive** or **Both WIP and Archive** are selected for Transactions.

The default beginning and ending statement date is "mm/dd/yyyy". If you want all statements selected, accept the default beginning and ending statement dates.

Press "R" if you want the report date specified when the report is generated to be used for the date. The text "RptDate" will be displayed in the date field indicating that the report date will be used for the date field.

Press "F" if you want the first day of the month specified for the report date to be used as the beginning statement date. The text "FirstDay" will be displayed in the date field indicating that the first day of the month specified for the report date will be used for the date field.

Note: Use of "R" and "F" in the date fields as the beginning or ending statement date allows you to run the report every month without having to edit the report writer definition.

Archive Note: When including archived transactions, you will also be asked to specify a beginning and ending transaction date. Only those archived transactions that are included in both date ranges specified will be selected.

User ID   Maximum of 8 characters. Enter the range of User IDs you want included. A range of User IDs is based on alphabetic order of User ID.

The   button can be used to open the User Lookup window that allows you to view a list of users and select any user by double-clicking it.

Receipt Allocation Type

Note: This selection parameter is available only for field #'s 77-79. The Firm, Primary Timekeeper, Secondary Timekeeper and Originating Timekeeper options are available only for field #79.

Enter one of the following designations: Fees, Cost Expenses, Cost Advances, Finance Charge, Fee Sales Tax, Expense Sales Tax, Advance Sales Tax, Primary Timekeeper, Secondary Timekeeper, Originating Timekeeper or Firm.

If **Fees** is selected, you will be asked to specify a beginning and ending timekeeper. The default beginning timekeeper is 0. When **Fees** is selected, the Include Fee Compensation Amounts check box is available.

If **Cost Expenses** or **Cost Advances** is selected, you will be asked to specify a beginning and ending Cost Type.

If **Primary Timekeeper**, **Secondary Timekeeper** or **Originating Timekeeper** is selected, you will be asked to specify a beginning and ending timekeeper range and/or timekeeper level range.

Note: The Receipt Allocation information (field#'s 76-79) is retrieved from the statement detail file whereas the billed fields (field #'s 86-107) are retrieved from the client ledger file.

Include Fee Compensation Amounts

The **Include Fee Compensation Amounts** check box is only available when the **Receipt Allocation Type** field is set to **Fees**.

Select this check box to report the amount paid less any primary, secondary, and originating allocations.

Clear this check box to report the full amount allocated to the specified timekeeper(s) without regard to fee compensation amounts.

Receipt Allocation Period

Enter the time period of payment transactions to include. Valid time periods for this report include:

> All
> Today
> Current Reporting Month
> Current Calendar Month
> Current Reporting Month Prior Year
> Current Calendar Month Prior Year
> Current Quarter
> Current Reporting Year
> Current Calendar Year
> Prior Reporting Month
> Prior Calendar Month
> Prior Reporting Month Prior Year
> Prior Calendar Month Prior Year
> Prior Quarter
> Prior Reporting Year
> Prior Calendar Year
> Custom

When any time period (with the exception of **Custom**) is selected, the date range currently associated with that period will also be displayed. The report definition stores the period, rather than the date, and when run will use the current date range that is associated with that time period.

If **Custom** is selected, a specific date range must also be specified. The report definition stores the date range specified and will always use that date as the default when running the report.

Note: This selection parameter is available only for field #'s 76-79, and 108.

Form Preview Window

The Form Preview Window is displayed by pressing the **Preview** button on the **Form Layout** tab of the Forms Writer window.

Each line of the form is shown along with its line number. X's represent an alphanumeric character from a Tabs3 data field and 9's represent a numeric character from a Tabs3 Data field. Dates are shown as mm/dd/yyyy. Text items print the text entered for the item.

This window is helpful for making adjustments to your form definition before printing the form. It will also display any error messages that may be generated by the items you have already defined. The following is a list of these error messages, what causes the error messages and how they can be resolved.

XXXXXX	Red text indicates information that will be truncated or wrapped because it exceeds the maximum form width.
Overlap	An Overlap is caused when you have multiple items printing in the same space. For example, if you defined two items as being on line #5 beginning in Tab position 1, an overlap occurs. An Overlap indicator will be displayed in the Overlap column. If a form is printed that has an Overlap in it, the Report Writer will print the item that overlaps on the following line.
Page Overrun	A Page Overrun occurs when you have more lines to print than are allowed by the Lines Per Form specified on the Main tab. For example, if the Lines Per Form is 6 and you have defined all 6 lines and the sixth line should wrap, it is possible to have seven or more lines on the form. This situation will cause a Page Overrun. If you had configured the second line to wrap instead of the sixth line, you would have both an Overlap and a Page Overrun. Page Overruns are indicated by the line number being printed in red.

Tip: You should use the **Preview** button after adding or modifying a Tabs3 Form Definition to check for possible error messages.

Note: If you print forms that have a Page Overrun, the excess portion of the form will print on the following form. After the excess portion prints, the next client will begin printing at the beginning of the next form.

Query Tab

The **Query** tab of the Forms Writer window is used to specify selection criteria that are used to determine whether or not the client or record should be included on a form. Up to 40 queries can be defined for each definition. For example, you can state that you only want forms generated for clients with a primary timekeeper of 1. Or, you can state that you only want forms generated for clients with a balance due that is greater than $200.00. Or you can state that you only want forms generated for clients that have work-in-process less than $500.00. Or, you can stipulate that you only want forms generated for clients that meet all of the aforementioned criteria.

Note: This tab is optional. If you want all clients selected, then simply skip this tab.

Note: You also have the ability to change or add queries at the time you generate forms. The changes made at that time are temporary and are not saved to the definition file.

As each query is added, it is shown in the display of queries in the lower portion of the window. Each line in the display of queries represents a single query. To modify an existing query, simply highlight the desired query and the associated fields with that query will be displayed in the upper portion of the window.

New Query	The **New Query** button can be used to define a new query. You can also click on the (New Query) row in the query display to add a new query. To insert a query between existing queries, add a new query and then use the **Move Up** button to move the query to the desired position.
Delete	The **Delete** button can be used to delete the highlighted query. Any subsequent queries will be moved up one position.
Move Up	The **Move Up** button can be used to move the highlighted query up one row.
Move Down	The **Move Down** button can be used to move the highlighted column down one row.

Fields on the Query Tab

The following fields are found on the **Query** tab.

Field	Select the desired field.
	The ability to use a field as a selection parameter allows you to define selection criteria on fields that are not included on the forms. For example, you may only want to generate forms for clients that have a zip code greater than 50000 and less than 60000, but not include the zip code field as an item on your report.
	The button can be used to open the Field Lookup window that allows you to view a list of fields and select a field by double-clicking it.
And/Or	Select **And** or **Or** for the selection criteria. This field is not available for the first query.

	And	Select **And** if you want the previous criterion and the current criterion to be true in order for the client to be selected.
	Or	Select **Or** if you want the previous criterion or the current criterion to be true in order for the client to be selected.

Note: Multiple selection criteria are tested in the order they are presented. You cannot assign priority to a selection criterion or a group of selection criteria.

Test Condition	You can select one condition per criterion. The following test conditions are available:

- ❑ Greater Than
- ❑ Greater Than or Equal To
- ❑ Equal To
- ❑ Less Than
- ❑ Less Than or Equal To
- ❑ Not Equal To
- ❑ Contains

Note: The "Contains" condition can only be used when the field you have selected is alphanumeric (i.e., it cannot be used when the field # selected is a date, decimal or numeric field).

Test Value

The information that can be entered in the Test Value field depends on whether the Field specified is alphanumeric, numeric or date. Enter the value you want used for comparison purposes.

Alphanumeric Alphanumeric strings are allowed when the field is alphanumeric. Maximum of 30 characters for alphanumeric fields.

Numeric Maximum of 11 characters (including decimal point and minus sign if used) for numeric fields.

Date Select Report Date or Other Date. If you select Other Date, you will be allowed to specify the desired date. An mm/dd/yyyy format is used for date fields.

Sort Tab

The **Sort** tab of the Forms Writer window is used to select primary and secondary sort orders and also to select an ascending or descending sort order.

Primary Sort Field

Maximum of 3 digits (blank or 1-131). Enter the field that you want the forms to be sorted on. For example, if you select a primary sort field of Originating Timekeeper, then forms for all of originating timekeeper #1's clients will print first, followed by forms for all of originating timekeeper #2's clients, etc.

The field selected for the Primary Sort field does not have to be used on the form.

The   button can be used to open the Field Lookup window that allows you to view a list of fields and select a field by double-clicking it.

Leave this field blank if you do not want the forms sorted. If you leave this field blank, then the clients will be output in random order. If you want the forms output in numerical order, then you should select a primary sort field based on the Client ID (provided you are using a numeric Key Type). If you want the forms output in alphabetical order, then you should select Name Search as the primary sort field.

Secondary Sort Field

Maximum of 3 digits (blank or 1-131). Enter the field that you want the forms sorted on within the primary sort. For example, if you select a primary sort field of Primary Timekeeper and a secondary sort field of Name Search, then all of primary timekeeper #1's clients will print first in alphabetical order. Then, all of primary timekeeper #2's clients will print next in alphabetical order. Then, all of primary timekeeper #3's clients will print next in alphabetical order, etc.

The field selected for the Secondary Sort field does not have to be used on the form.

The   button can be used to open the Field Lookup window that allows you to view a list of fields and select a field by double-clicking it.

Leave this field blank if you do not want the forms to be sorted on a secondary field.

Sort Order	Select **Ascending** or **Descending**.

Ascending	Select **Ascending** if you want the sort orders to be in ascending order. For example, if you want the clients to print in alphabetical order from A to Z, you would select **Ascending**.
Descending	Select **Descending** if you want the order to be in descending order. For example, if you want the clients to be printed in order based on Balance Due with the clients having the largest balance due printing first, then you would select **Descending**.

Note: You cannot mix ascending and descending orders when using both a primary and secondary sort. Both sort orders will be either ascending or descending.

Print Tab

The **Print** tab of the Forms Writer window is used to print forms or a form definition listing.

Print	The **Print** button can be used to display the Print dialog box to print the forms.
Print Definition	The **Print Definition** button can be used to display the Print dialog box to print a listing of the form definition.
Print Test Pattern	The **Print Test Pattern** button can be used to display the Print dialog box to print a test pattern. Printing a test pattern allows you to adjust your forms in the printer so the information will be properly aligned on the form.

The following fields are available on the **Print** tab.

Output Format	**Note:** This option is not available in the Forms Writer window. It is used in the Report Writer window *(page 13)*.
Orientation	Select which direction you want the report printed.

Portrait	Portrait orientation is taller than it is wide. When you hold a page that is printed using a portrait orientation, you hold the page with the long edges to the sides.
Landscape	Landscape orientation is wider than it is tall. When you hold a page that is printed using a landscape orientation, you hold the page with the short edges to the sides. When using Automatic Font Selection, printing with landscape orientation will result in a larger font.

Report Date	Uses mm/dd/yyyy format. The Report Date is used as a cut-off date for work-in-process payments and as a basis for ageing (if you have used work-in-process payments or accounts receivable figures for the report). The Report Date is also used as a cut-off date whenever a Date of "R" (report date) was entered for work-in-process transactions, archive transactions, or ledger records. The Report Date is used as the Test Value whenever the Report Date is specified for a query.
Single File Per Client	This option was designed to be used for mailing lists and labels where you may want a client to print only once regardless of how many files or matters the client has. If your report includes any subtotaled fields, all files for a client will be included in the subtotal when using this option. Also, if you are using formulas, all the files are summed and the formulas are then applied. However, if you include subtotals and this option is cleared, the formula is applied to each file

and then the results are summed. Report totals may vary depending on how this option is set due to how calculations are performed. If you want to include subtotaled fields, you may want to use the **Print Subtotals Only** check box on the **Sort** tab to print the client only once.

Select this check box if you want only one file per client to print.

Clear this check box if you want all files for each client to print.

Chapter 5
Tutorial

Introduction

Software Technology, Inc., has created this tutorial for persons who are familiar with Tabs3 and want a quick lesson on how to use the Tabs3 Report Writer add-on module. This tutorial is a step by step approach, ideal for self-guided instruction. This tutorial was designed to be used in front of a computer in conjunction with the Tabs3 Report Writer software (either an evaluation system or a fully functional user system). This "hands on" approach allows you to follow along and use the system as you learn.

This tutorial will walk you through creating one report and two different forms. The report and forms that are created are included in the sample reports and forms that come with the Tabs3 Report Writer software.

Note: If the Tabs3 Report Writer software has already been installed and you want to begin the tutorial without performing the installation, simply skip the Installation section and begin with the Starting Up the Tabs3 Report Writer section on page 54.

Installing the Tabs3 Report Writer Software & Sample Data

Note: The Tabs3 software *must* be installed before installing the Tabs3 Report Writer software. Make sure the Tabs3 and Tabs3 Report Writer versions match. For example, if you have Version 17 of Tabs3, you must also have Version 17 of the Tabs3 Report Writer.

Tabs3 Report Writer software is provided on a CD and must be installed to a hard disk where Tabs3 is installed.

▶ **To install Tabs3 Report Writer on your hard disk:**

1. Insert the CD into your CD drive.

2. A CD Browser program will automatically start.

   Note: If the CD Autorun feature is disabled, click the **Start** button, and then click **Run**. Click the **Browse** button and navigate to the CD drive. Double-click the **LAUNCH.EXE** file. Click **OK**.

3. Select the appropriate menu option to install trial versions.

4. Follow the on-screen instructions to install the software.

   Note: The Tabs3 Report Writer *must* be installed in the same directory where the System Configuration file and Tabs3 program files reside.

Starting Up the Tabs3 Report Writer

During the SETUP program a **Tabs3 & PracticeMaster** program group is created. A **Trial Software with Sample Date** group is included in the **Tabs3 & PracticeMaster** program group.

For purposes of this tutorial, use the Tabs3 icon found in the **Trial Software with Sample Date** group.

To start the Tabs3 Report Writer, you must first start Tabs3. From the Tabs3 window, click **Reports** and then click **Report Writer**. *(Note: If the Tabs3 Report Writer module has not been installed, the Report Writer menu option will be dimmed.)*
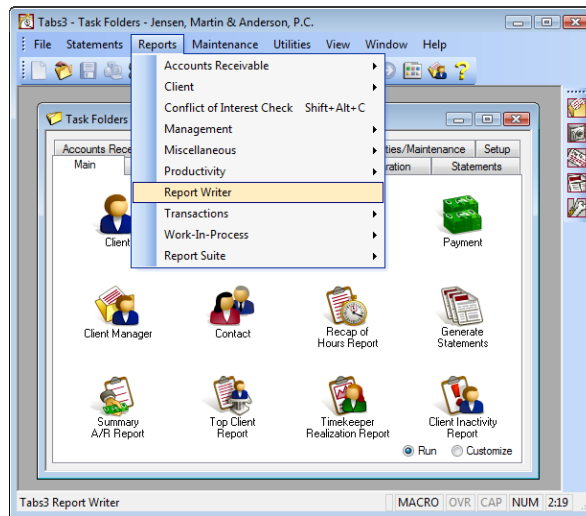
Fig. 5-1, Starting Up the Tabs3 Report Writer

Once the Report Writer has been started, the Report Writer Manager window will be displayed.

Report Writer Manager

The Report Writer Manager is shown when the Report Writer menu is selected.
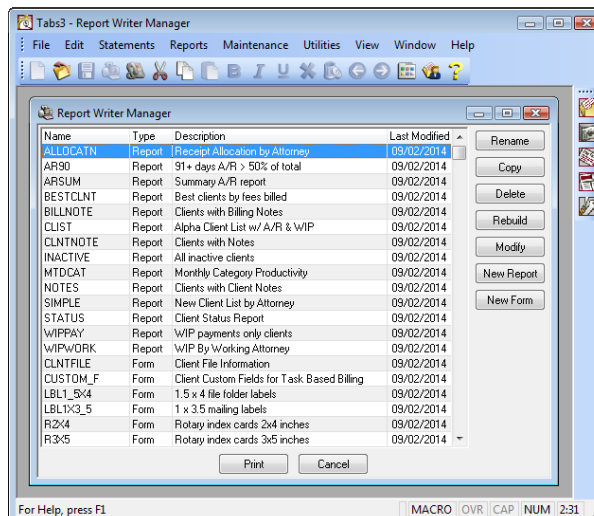
Fig. 5-2, Report Writer Manager

Notice that a list of reports and forms is shown in the Report Writer Manager. This list is referred to as the **Report Writer Table of Contents**. This list includes all definitions that have been created for custom reports and forms. **Definitions** include the instructions that are used to create reports and forms. Definitions consist of report writer definitions and form definitions.

The Report Writer Table of Contents includes the name, type, description and last modified date for each report writer and form definition in the list. You may have noticed that all report writer definitions are shown first in alphabetical order by name. Following the report definitions, all form definitions are shown in alphabetical order by name.

At this time, you may want to thumb through the various reports and forms shown in the Sample Reports section of this manual to get an idea of the differences between reports and forms.

Creating a Tabs3 Report Writer Definition

The first Tabs3 Report that we will create will be a simple client list that includes accounts receivable and work-in-process information. A report similar to the report we will create is already included in the sample data as "CLIST". We will create a modified version of the CLIST report and call it "CLIENTL".

Click:	**New Report**	You will be asked to specify the report's name.
Enter:	**CLIENTL**	For the name.
Click:	**OK**	To open the Report Writer window. This window consists of various tabs and is used to define report writer definitions.

Main Tab

The **Main** tab is used to define a description, the column heading separator, two report heading lines, whether page numbers will be included in the report heading, a totals only report, double-spacing, whether you want commas in the report, a client count and the report width.

Enter:	**Client List with A/R and WIP**	In the Report Description field. This description will be shown in the Table of Contents.

Note: You can use the mouse or the Tab key to move forward to the next field.

Enter:	**– (dash character)**	For the Column Heading Separator. This field contains the character that will print underneath the column heading. You can use any character on your keyboard.
Enter:	**Alphabetical Client List Including A/R & WIP**	In the Report Heading Line 1.
Enter:	**By Originating Attorney**	In the Report Heading Line 2.
Click:	**Print Commas in Amounts**	To select the Print Commas in Amounts check box.

Notice the **Report Width** can be set to Automatic or a specified Fixed Width. An Automatic Report Width uses the total of all the defined columns on the report whereas a Fixed Width will generate warnings when adding a column that exceeds the specified width. We will leave the Report Width at Automatic.

Column Definition Tab

Click: **Column Definition**   To select the **Column Definition** tab.

The **Column Definition** tab is where the "heart" of the report definition is defined. This tab is used to define the columns on the report. Each column defined will consist of a data field or a formula field. The field specified can be from the client file, work-in-process, billed information, write-up/write-down information, the archive file, receipt allocation information, client funds information or client notes. You will be able to specify the formula or field number, whether or not you want the column to print on the report, the width of the column and the column heading. You will be asked if you want the column subtotaled and if so whether you want it to print on the subtotal line. If the column is a numeric column, you will be asked if you want it left blank when it is zero. Where appropriate, you will be asked to specify the beginning and ending date, tcode, timekeeper and category; if you want to include billable, non-billable or all transactions; and if you want to include transactions set to hold, print or both.

The report that we are defining consists of six columns. The lower portion of the window includes all columns that have already been defined.

Column 1

Click: ⌄   Shown next to the Field label. A lookup window containing a list of available fields is shown. Use your PgDn key to go to the end of the list. Notice that the last field shown is #132 for formulas. After reviewing the various fields available, go back to the top of the list.

Selecting a field is accomplished by double-clicking the desired field; or, by clicking the desired field and then clicking **OK**.

Select: **2 Name**   To select the client name as a column. Additional fields will be displayed in the window as shown in Fig. 5-3. Notice that the column headings (Header 1 and Header 2) default to the name of the field. We will leave Header 1 blank but will change Header 2.
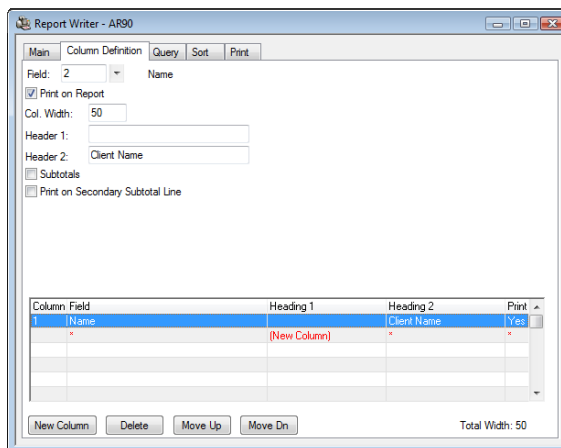
Fig. 5-3, Column 1

We will leave the Col. Width (Column Width) set at 50. Notice the Total Width in the lower right-hand corner currently shows a Total Width of 50.

Enter: **Client Name**   In the Header 2 field to change the column heading.

> **Hint:** When defining a one-line column heading, the heading may look better by defining the heading in Column Heading 2 instead of Column Heading 1.

Column 2

Click: the **New Column** button	At the bottom of the window to add the second column.

Click: ⌄   Shown next to the Field label.

Select: **1 Client ID**   To select the Client ID field. We will accept all defaults for this column.

> **Note:** If you already know the number of the field you want to use, you do not have to use the lookup window to select the field.

Column 3

Click: **New Column**   To add the third column.

Click: ⌄   Shown next to the Field label.

Select: **13 Contact Full Name**   To select the Contact Full Name field. We will accept all defaults for this column.

We have now defined three columns of our report. Let's take a quick look at what the report looks like so far.

Click: the **Print** tab   The **Print** tab is shown at the top of the window.

Click: the **Print** button   The **Print** button is shown at the bottom of the window. The Print dialog box will be displayed. If no printer is shown in the window, click the down-arrow button to select a printer.

Click: **Preview**

Click: **OK**   The report will be displayed in the Preview window. Notice each column with the specified headings and separator is displayed. Notice that the current Report Width is also displayed in the title bar. The Print tab makes it very easy to view your report at any time while creating it.

Tip: You can use the **Zoom** button to change the view of the report.

Adding a Spacer Column (Column 4)

Take a look at the Client ID and Contact Full Name columns. Notice there is only one space between these two columns. The Report Writer automatically inserts only one space between all columns. Normally this is adequate. However, when a right justified column is followed by a left justified column, you may want to increase the space between columns. Before we add the next column of the report, let's adjust this space between these two columns by adding a "spacer" column. A spacer column is used to insert a column of blank spaces between columns.

Click: **Close**   At the bottom of the Preview window to close it and return to the Report Writer window.

Click: the **Column Definition** tab

Click: **New Column**

Click: ⌄   Shown next to the Field label.

Select: **132 Formula**   To add a formula field. A spacer column is a formula field. We want to insert 3 blank spaces between the two columns, so enter a column width of "1". We are entering 1 because the Report Writer will automatically include a blank space before the spacer column and a blank space after the spacer column (i.e., 3 – 2 =

1). Leave the Column Heading 1 field blank. Clear the Column Heading 2 field so it is blank.

Enter: ' '   In the Formula field. To enter a spacer column, simply enter a single quote followed by a space followed by another single quote.

Since the spacer column is shown as the last column added, it needs to be moved up so it is shown between columns 2 and 3.

Click: the **Move Up** button   To correctly position the spacer column between columns 2 and 3.

Editing a Column

When previewing the report, you may have noticed that the Client Name column was a full 50 characters wide. Let's reduce the width of this column to 35.

Click: Column **1**   So the first row is highlighted in the list of columns. Notice that the information for column 1 is automatically displayed.

Enter: **35**   In the Column Width field. Let's take a quick look at our changes.

Click: the **Print** tab

Click: the **Print** button   Notice that the **Preview** option is selected by default from the last time we previewed the report.

Click: **OK**   The report will be displayed in the Preview window. Notice the spacer column between the Client ID and Contact Full Name fields. Also notice the narrower Client Name column.

Columns print on the report either right justified if they are numeric columns or left justified if they are alphanumeric columns or date columns. Appendix A of this manual consists of a table that lists each field, its default length, whether it is right or left justified and the field type.

We shall now enter the remaining three columns for this report.

Click: the **Close** button   To close the Preview window.

Column 5

Click: the **Column Definition** tab

Click: **New Column**   To add the next column.

Click: ⌄   Shown next to the Field label.

Select: **14 Phone 1**   To select the Phone 1 field.

Enter: **Phone #**   In the Header 2 field for the new column heading.

Column 6

Click: **New Column**   To add the next column.

Enter: **132**   In the Field to select a Formula field. This column will be a formula field that will consist of a figure for accounts receivable and work-in-process.

Enter: **Total**   In the Header 1 field.

Enter: **A/R + WIP**   In the Header 2 field.

Click: **Subtotals**	To select the **Subtotals** check box. Selecting this check box will print a subtotal for this column at the end of the report.

Leave the **Blank When Zero** check box unchecked. If you select this check box, then whenever an amount is zero, no amount will print. When this check box is cleared, then "0.00" will print if the amount is zero.

We are now ready to enter the formula. A formula field can consist of up to 70 characters. You can use addition, subtraction, multiplication, division and percentage operators. Previously defined columns and any field can be used in the formula. All calculations within a formula are performed from left to right, with any calculations within parentheses being performed first.

Click: the **Formula** field	To place the cursor in the **Formula** field. We can display a list of fields or columns when we are in the formula field by 1) pressing the F2 key to embed a field; or 2) pressing the F3 key to embed a column. We want to select a field.
Press: **F2**	To open the Field List window.
Select: 82 Fee Transactions	To select the Fee Transactions field. F82 will be shown in the field to indicate Field 82.
Type: + (the addition sign)	Spaces before and after the plus sign are not necessary.
Press: **F2**	To specify another field.
Select: **83 Expense Transactions**	To select the Expense Transactions field.
Type: +	
Press: **F2**	
Select: **84 Advance Transactions**	To select the Advance Transactions field.
Type: +	
Press: **F2**	
Select: **120 Balance Due**	To select the Balance Due field.

Your formula field should read "F82+F83+F84+F120".

Column 7

Click: **New Column**	To add the last column.
Click: ⌄	Shown next to the Field label.
Select: **35 Orig. Initials**	To select the Originating Timekeeper Initials field. This last column will be the originating timekeeper so that we can sort the clients by originating timekeeper. We have selected the **Orig. Initials** field instead of **Orig. Timekeeper** or **Orig. Name** because we want the timekeeper initials to print in the subtotal line instead of the timekeeper number or name.
Click: **Print on Report**	To clear the **Print on Report** check box. We do not want the initials to print in a separate column, we only want them to print in the subtotal line. Defining the subtotal line is done later on the **Sort** tab.

We have completed defining the various columns on the report.

Query Tab

Click: the **Query** tab   To display the **Query** tab.

The **Query** tab is where the report selection criteria are defined. This screen allows you to specify criteria to be used when selecting the information to include on the report. For example, you can specify that you only want clients with zip codes in a specific range. Or, you can specify that you only want clients whose balance due is greater than $1,000.00. These are just two examples of the many selection criteria that can be used.
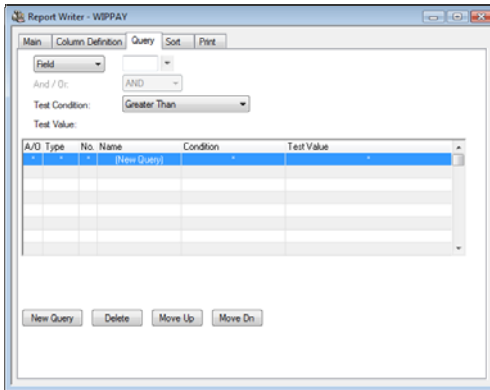
Fig. 5-4, Query Tab

Since we want all clients to be selected for this report, we will not enter any information on this screen.

Note: Query information can also be specified when printing the report.

Press: **Ctrl+PgDn**   To move to the next tab, the **Sort** tab.

Sort Tab

The **Sort** tab will be displayed as shown in Fig. 5-5. This tab allows you to define additional report criteria, such as primary and secondary sort columns, whether or not you want the sort columns subtotaled, and if so, the subtotal description, heading and page control. You can also define if you want to print subtotals only and whether you want the sorting in ascending or descending order.
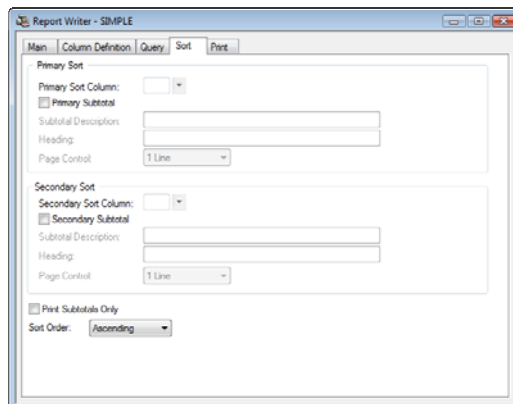
Fig. 5-5, Sort Tab

For the report we are currently defining, we would like the clients to print in alphabetical order by originating timekeeper. To accomplish this, we need to define a primary sort based on the originating timekeeper and a secondary sort based on the client name.

Click:	Shown next to the Primary Sort Column field. A lookup window with the defined columns will be displayed.
Double-click: **7 Orig. Initials**	To select column 7 because we want the clients sorted by originating timekeeper.
Click: **Primary Subtotal**	To select the Primary Subtotal check box since we want subtotals printed for each timekeeper.
Enter: 3 spaces followed by the text **Total for Attorney**	In the Subtotal Description field. Whenever text is entered in the Subtotal Description field, the subtotal line will include the Subtotal Description plus the subtotal identifier. Therefore, in our report, the following subtotal line will print for each timekeeper's group of clients: "Total for Attorney XXX" (where XXX represents the attorney's initials). We included three spaces so the subtotal line is indented. Leave the Heading field blank.
Select: **2 Lines**	In the Page Control field. This field represents the number of blank lines we want printed following each originating timekeeper's group of clients.
Click:	Shown next to the Secondary Sort Column field. A lookup window with the defined columns will be displayed.
Double-click: **1 Name**	To select column 1 because we want each originating timekeeper's clients sorted in alphabetical order. *(Note: If we wanted the clients in numerical order, we would select column 2 for Client ID.)* Since we don't want the clients subtotaled by client, leave the Secondary Subtotal check box cleared. The remaining fields under Secondary Sort remain dimmed because there will be no subtotaling on the secondary sort.

We will leave the **Print Subtotals Only** check box cleared since we want to see each client listed on the report. We will also leave the **Sort Order** set at Ascending since we want the clients listed in ascending alphabetical order.

Saving a Definition

We have now completed the report definition.

Click:	To save the report writer report definition.
Click:	To close the Report Writer window. You will be returned to the Report Writer Manager.

Printing a Report

Notice that the CLIENTL report definition is highlighted in the Report Writer Manager. The software keeps track of the last report accessed during the current session.

To print a report, you can double-click the report, or highlight the report and then click the **Print** button.

Let's print the report. With the CLIENTL report highlighted,

Click: the **Print** button

The Print Report window will be displayed. This window is similar to the Report Writer window with the exception that only the **Print** and **Query** tabs are shown.

When printing a report, you are allowed to edit or add report selection criteria using the **Query** tab. We are not going to make any changes at this time. Any changes that would be made to the selection criteria in the Print Report window are temporary and are not saved to the report definition file.

The **Print** tab shown is the same as the **Print** tab that we used in the Report Writer window to preview the report. Notice the various options available under Output Format. Excluding the Report option, all of the remaining options are generally used for exporting information for use in a third-party software program. We will leave the Report option selected.

The Report Date is used as a cut-off date for work-in-process payments and as a basis for ageing (i.e., when work-in-process payments or aged accounts receivable figures are used in the report). The Balance Due field we are using in the report definition formula includes WIP payments through the Report Date. We will accept the default date which is the computer system date.

If we wanted only one matter or file per client to print, we would select the **Single Matter Per Client** check box. Since we want all files to print on this report, we will leave this check box cleared.

Click: **Print**   The Print dialog box will be shown. The Preview option is still selected.

Click: **OK**   To display the report in the Preview window. If desired, you can click the **Print** button shown at the bottom of the Preview window to print the report.

Changing a Report Definition

After looking at the report that was just printed, you may notice that several clients with less than $1,000 in the last column are included on the report. Let's say we want to modify the report so that clients who have $1,000 or less in the Total A/R + WIP column will not be included in the report. To do this, we need to edit the report selection criteria on the **Query** tab.

Click: **Close**   To close the Preview window.

If we wanted to make the change for this report only, we could simply edit the **Query** tab shown. However, we want the change to be saved so it is used every time we run the report.

Click: To close the Print Report window and display the Report Manager. The CLIENTL report is still highlighted.

Click: **Modify**   To open the Report Definition window.

Click: **Query**   To display the **Query** tab. Normally, you click the **New Query** button to add a query. However, since this is the first query being defined, the New Query row shown in the bottom of the window is highlighted.

Click: Next to the Field/Column indicator. By default, Field is shown,

Click: **Column**   Notice that the field to the right of the Field/Column indicator is blank. We want to select a column.

Click: To open the Column List window.

Double-click: **6**   To select column 6, Total A/R + WIP.

Select: **Greater Than or Equal To**   For the Test Condition.

Type: **1000**		In the Test Value field. This criteria will only select clients whose column 6 is $1,000 or more.
Click:		To save the change.

Let's print the report with the new change.

Click: the **Print** tab	We do not need to make any changes.
Click: the **Print** button	Preview is selected.
Click: **OK**	To display the report in the Preview window. Notice that the clients with 0.00 in the last column are no longer included on the report. If desired, you can click the **Print** button shown at the bottom of the Preview window to print the report.
Click: **Close**	To close the Preview window after you have finished viewing the report.
Click:	To close the Report Definition window.

Printing a Tabs3 Report Definition

You can print out a report definition for any Tabs3 report that has been defined. Let's print a report definition for the report we just created. From the Report Writer Manager, the report CLIENTL is highlighted.

Click: the **Print** button	To display the Print Report window.
Click: **Print Definition**	Preview is still selected.
Click: **OK**	To display the report definition in the Preview window. Use the arrow keys to page through the entire definition. If desired, you can click the **Print** button to print the definition.
	Once you have finished viewing the report, return to the Report Writer Manager window.

Congratulations! You have just completed the reports section of this tutorial. The remainder of this tutorial will deal with how to define form definitions and print forms.

Creating a Tabs3 Form Writer Definition

The first Tabs3 form that we will create will be a mailing label. The mailing label is designed to print on a 1 x 3 $\frac{1}{2}$ inch label in a singular row. This form is already included in the sample data as "LBL1X3_5". We will create it again as a form definition called "LABEL1".

From the Report Writer Manager,

Click: **New Form**	You will be asked to specify the form's name.
Enter: **LABEL1**	For the name.
Click: **OK**	To open the Forms Writer Window. This window consists of various tabs and is used to define form writer definitions. Compared to the Report Writer window, the **Query** and **Print** tabs are identical to those tabs in the Report Writer. However, the **Main**, **Form Layout** and **Sort** tabs are somewhat different.

Main Tab

The **Main** tab is used to define a description, the form width, lines per form, forms per page, whether blank lines are closed up and whether commas are printed in amounts.

Enter: **1 by 3.5 Inch Mailing Labels**   In the Form Description field.

Enter: **39**   In the Width field. This figure is determined by measuring the width of the form and calculating how many characters will fit on the form. You don't necessarily want to enter the maximum number of characters that will fit, but you want to enter the maximum number of characters that you want to print on any one line. Our mailing label is 3.5 inches wide. However, we want to allow for a $\frac{1}{8}$ inch left and right margin which gives us a 3.25 inch printing width. We plan on printing with a 10 point font which is approximately 12 characters per inch. 12 multiplied by 3.25 equals 39.

Enter: **6**   In the Lines Per Form field. The number of Lines Per Form field is determined by measuring the length from the top of one form to the top of the following form and calculating how many lines will print on the form by multiplying that length by 6. The Forms Writer always prints using 6 lines per inch. Our form will be 1 inch labels. Each mailing label is actually $\frac{15}{16}$ inch long. However, from the top of one mailing label to the top of the next mailing label, the length is exactly 1 inch. Since 1 x 6 = 6, we want to enter 6 for the Lines Per Form.

Enter: **10**   In the Forms Per Page field.

Select: **Omit Blank Lines**   To select the Omit Blank Lines check box.

Form Layout Tab

The **Form Layout** tab is where the "heart" of the form definition resides. This tab is used to define the lines and items on the form. The maximum number of printable lines for a form is 256 lines. The maximum width of a form is 199 characters. Each line can consist of multiple "items", an item being either a Tabs3 field or text specified by you. Each form can consist of up to 50 items. For each item included in the form, you are allowed to define the line number, the tab position, whether the item is a Tabs3 field or text only and the field width. If the item on the line exceeds the form width defined on the **Main** tab, you will be asked to specify if you want the item to wrap to the next line or be truncated. If you select to wrap the excess information to the next line, you will be asked to specify the tab position where you want the wrapped portion to be indented.

Click: **Form Layout**   To select the **Form Layout** tab.

The mailing label that we are defining consists of 6 lines for each form with each line consisting of one item. Enter the following information.

Item 1

Click: Shown next to the **Field** label. A lookup window containing a list of available fields is shown.

Select: **3 Full Name**   To select the client name as an item. Additional fields will be displayed.

Enter: **1**   In the Line No. field.

Enter: **1**   In the Tab Position field.

Enter: **39**   In the Field Width column.

Select:	**Wrap Text**	To select the Wrap Text check box. We want the client name to wrap if it exceeds 39 characters.
Enter:	**3**	In the Wrap Indent field to indicate the wrapped line should indent to the third character.

Item 2

Click:	the **New Item** button	
Click:		Shown next to the **Field** label.
Select:	**5 Address Line 1**	
Enter:	**2**	In the Line No. field

Leave the remaining fields at their defaults.

Item 3

Click:	the **New Item** button	
Click:		Shown next to the **Field** label.
Select:	**6 Address Line 2**	
Enter:	**3**	In the Line No. field

Leave the remaining fields at their defaults.

Item 4

Click:	the **New Item** button	
Click:		Shown next to the **Field** label.
Select:	**7 Address Line 3**	
Enter:	**4**	In the Line No. field. Leave the remaining fields at their defaults.

Item 5

Click:	the **New Item** button	
Click:		Shown next to the **Field** label.
Select:	**12 City/State/Zip**	
Enter:	**5**	In the Line No. field. Leave the remaining fields at their defaults.

We have now defined all items for the mailing label: client name, 3 address lines and a city/state/zip line.

Form Preview Window

Notice at the bottom of the window that you can use the **Preview** button do display the form.

Click: **Preview**	The Form Preview window will be shown. Note that an OVERLAP is shown for line 2. An OVERLAP indicates you have multiple items configured to print on the same line.
Click: **OK**	To close the Form Preview window and return to the Forms Writer window. Take a close look at the items that have been defined. Can you determine why the OVERLAP message was displayed?

The OVERLAP message is generated because we have specified that Item 1 should wrap onto Line 2 and we have also specified that Item 2 should print on Line 2. This causes a potential overlap since we have specified two separate pieces of information to print on the same line. This particular overlap could cause six lines to print on the mailing label. Six lines of printing on a one inch label when printing 6 lines per inch can cause a problem. Because of this potential problem, we will want to eliminate the OVERLAP.

Let's fix the OVERLAP situation.

Click: **Line 1**	To highlight the client name item. Let's change the field so text is not wrapped.
Click: **Wrap Text**	To clear the Wrap Text check box. Let's check if the OVERLAP is eliminated.
Click: **Preview**	To display the Form Preview window. The OVERLAP message is gone.
Click: **OK**	To close the Form Preview window.

Query Tab

Click: the **Query** tab	To display the **Query** tab.

The **Query** tab is where the form's selection criteria are defined. This screen allows you to specify criteria to be used when selecting which clients should have forms printed. This tab is identical to the **Query** tab used in the Report Writer window.
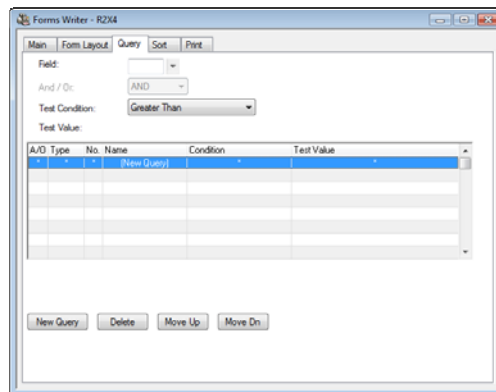
Fig. 5-6, Query Tab

We only want to print labels for clients that have an open date that is greater than or equal to 01/01/2014 for the mailing labels we are defining.

Click: ⌄	Next to the Field label. The Field List lookup window is displayed.
Double-click: **26 Date Opened**	To select the open date field.
Select: **Greater Than or Equal To**	For the Test Condition.

Click:	**Other Date**	For the Test Value.
Enter:	**01/01/2014**	For the date. This criteria will only select clients whose Date Opened is on or after January 1, 2014.
Press:	**Ctrl+PgDn**	To move to the next tab, the **Sort** tab.

Sort Tab

The **Sort** tab lets you define a primary and secondary sort field and specify whether you want to use an ascending or descending sort order.

We would like the mailing labels to print in zip code order.

Click:	⌄	Next to the Primary Sort Field.
Double-click:	**10 Zip**	To select the zip code field.

We will leave the remaining fields as they are.
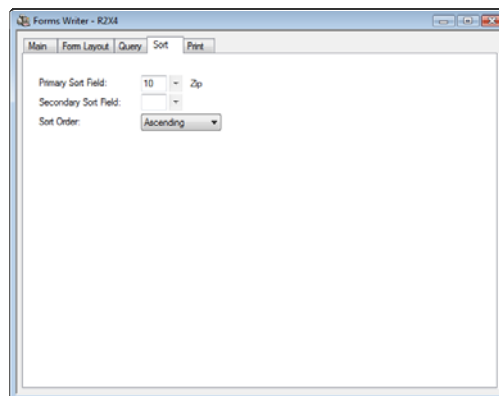
Fig. 5-7, Sort Tab

Printing Tabs3 Forms

Note: If you are actually going to be printing on labels, make sure that the printer you will be using will print using a 10 point font. Printing in a 12 point font or larger will exceed the form width. If you are simply printing on 8½ by 11 inch paper for this tutorial, it won't make a difference what font is used by your printer.

Click:	the **Print** tab	To display the **Print** tab.
Click:	**Single File Per Client**	Since we only want one label per client to print.
Click:	the **Print** button	To display the Print dialog box.
Click:	**Preview**	
Click:	**OK**	To begin previewing the forms. If desired, you can click the **Print** button shown at the bottom of the Preview window to print the forms.
Click:	**Close**	To close the Preview window after you have finished viewing the forms.

Click: [icon]   To close the Forms Writer window.

Since we have not yet saved the form definition, a message will be displayed asking if we want to save the changes.

Click: **Yes**   To save the changes.

Printing a Tabs3 Form Definition

Let's print a form definition for the forms we just created. From the Report Writer Manager, the form LABEL1 is highlighted.

Click: the **Print** button   To display the Print Form window.

Click: **Print Definition**   Preview is still selected.

Click: **OK**   To display the form definition in the Preview window. If desired, you can click the **Print** button to print the definition.

Once you have finished viewing the form definition, return to the Report Writer Manager window.

Defining Another Tabs3 Form Definition

The second Tabs3 form that we will create will be a rotary index card. This form is designed to print on a 2 x 4 inch rotary index card. This form is already included in the sample data as "R2x4". We will create it again as a form definition called "CARD1".

From the Report Writer Manager,

Click: **New Form**   To add a new form definition.

Enter: **CARD1**   For the form name.

Click: **OK**   To display the Forms Writer window.

Main Tab

Enter: **Rotary index cards 2x4 inches**   In the Form Description field.

Enter: **42**   In the Width field. Each rotary index card is 4 inches wide. However, we want to allow for a $\frac{1}{4}$ inch left and right margin which gives us a 3.5 inch printing width. We plan on printing with a 10 point font which is approximately 12 characters per inch. 12 multiplied by 3.5 equals 42.

Enter: **13**   In the Lines Per Form field. Each prepunched rotary index card is actually $2\frac{1}{6}$ inches long. The Tabs3 Forms Writer always prints using 6 lines per inch. Therefore, we enter "13" ($2\frac{1}{6}$ x 6) in the Lines Per Form field.

Enter: **1**   In the Forms Per Page field. The forms we will be printing on are continuous forms.

Form Layout Tab

The rotary index card that we are defining consists of 2 preliminary lines followed by 6 lines that include the client's name and address. The following figure is an example of what the printed rotary index cards will look like.

```
XXXXXXXXXXXXXXXX     Client #: 999999999.99
XXXXXXXXXXXX         XXXXXXXXXXXXXXXXXXXXXXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
      XXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXX
```

```
ACE MANUFACTURIN    Client #:        600.00
402-435-1739        Al Jones

Ace Manufacturing Company

5th & Turner
Malcolm  NE  68633
```

```
FIRST NATIONAL B    Client #:        700.00
402-466-3785        Lynn Traver

First National Bank and Trust of Lincoln

Platte Valley Building
13th & 'O' Streets
3rd Floor
Lincoln  NE  68510
```

Fig. 5-8 Example of printed rotary index cards.

Enter the following information. Line 1 will be configured with three items and Line 2 will be configured with two items. Lines 3 through 9 will be configured with only one item each.

Click: the **Form Layout** tab   To select the **Form Layout** tab.

Item 1

Click: ⌄   Shown next to the **Field** label. A lookup window containing a list of available fields is shown.

Select: **4 Name Search**   To select the Name Search field. We will accept the defaults for the remaining fields.

For the remainder of line 1, we want to print the text "Client ID:" followed by the Client ID.

Item 2

Click: **New Item**   To add an item.

Click: ⌄   Shown next to the **Field** label.

Select: **133 Text**   To select a Text field.

Enter: **1**   In the Line No. field.

Enter: **20**   In the Tab Position field.

Enter: **23**   In the Field Width field.

Enter:	**Client ID:**	In the Text field.

Item 3

Click:	**New Item**	To add an item.
Click:	![dropdown]	Shown next to the **Field** label.
Select:	**1 Client ID**	To select the Client ID field.
Enter:	**1**	In the Line No. field.
Enter:	**31**	In the Tab Position field. We will accept the defaults for the remaining fields.

Item 4

Line 2 will include the phone number followed by the contact full name.

Click:	**New Item**	To add an item.
Click:	![dropdown]	Shown next to the **Field** label.
Select:	**14 Phone 1**	To select the Phone 1 field. Notice that the item defaults to the next line, line 2. We will accept the defaults for the remaining fields.

Item 5

Click:	**New Item**	To add an item.
Click:	![dropdown]	Shown next to the **Field** label.
Select:	**13 Contact Full Name**	To select the Contact Full Name field.
Enter:	**2**	In the Line No. field.
Enter:	**26**	In the Tab Position field. We will accept the defaults for the remaining fields.

Let's look at the first two lines of our form.

Click:	**Preview**	To display the Preview window. The information shown in this window represents the first two lines of the form. Notice that the second line's last two X's are shown in red. *(You may need to resize the Output column to see the red X's.)* This tells us that the width of the line exceeds the form width we previously defined on the **Main** tab. Let's fix this.
Click:	**OK**	To close the Preview window.
Click:	the **Contact Full Name** line	To select the Contact Full Name item.
Enter:	**48**	In the Field Width field. This truncates the Contact Full Name by 2 characters.

Let's check this change.

Click:	**Preview**	To display the Preview window. Notice the red X's are gone.
Press:	**ESC**	To close the Preview window.

The remaining items consist of the client name and address.

Item 6

Click:	**New Item**	To add an item.
Click:	⌄	Shown next to the **Field** label.
Select:	**3 Full Name**	To select the client name field.
Enter:	**3**	In the Line No. field.
Enter:	**1**	In the Tab Position field.
Enter:	**50**	In the Field Width position.
Select:	the **Wrap Text** check box	
Enter:	**6**	In the **Wrap Indent** field.

Item 7

Click:	**New Item**	To add an item.
Click:	⌄	Shown next to the **Field** label.
Select:	**5 Address Line 1**	To select the first address line field. Notice the Line No. defaults to line 5 automatically taking into account line 3 that will wrap onto line 4. We will accept the defaults for the remaining fields.

Item 8

Click:	**New Item**	To add an item.
Click:	⌄	Shown next to the **Field** label.
Select:	**6 Address Line 2**	To select the second address line field. We will accept the defaults for the remaining fields.

Item 9

Click:	**New Item**	To add an item.
Click:	⌄	Shown next to the **Field** label.
Select:	**7 Address Line 3**	To select the third address line field. We will accept the defaults for the remaining fields.

Item 10

Click:	**New Item**	To add an item.
Click:	⌄	Shown next to the **Field** label.
Select:	**12 City/State/Zip**	To select the city/state/zip field. We will accept the defaults for the remaining fields.

Item 11

Click:	**New Item**	To add an item.
Click: ⌄		Shown next to the **Field** label.
Select:	**11 Country**	To select the country field. We will accept the defaults for the remaining fields.

We have now defined all items for the rotary index file card.

Click:	**Preview**	To display the Form Preview window. The red "X's" indicate that line 3 will be wrapped. After you have finished viewing the form,
Click:	**OK**	To close the Preview window.
Press:	**Ctrl+PgDn**	To select the **Query** tab.

Query Tab

Since we want a form to print for all clients, we will not change anything on this tab.

Press:	**Ctrl+PgDn**	To select the **Sort** tab.

Sort Tab

We would like the rotary index cards to print in alphabetical order by the Name Search field.

Click: ⌄		Next to the Primary Sort Field.
Double-click:	**4 Name Search**	To select the Name Search field.

We will leave the remaining fields as they are.

Printing the Second Tabs3 Form

Click:	the **Print** tab	To display the **Print** tab.
Click:	**Single File Per Client**	Since we only want one card per client to print.
Click:	the **Print** button	To display the Print dialog box.
Click:	**Preview**	
Click:	**OK**	To begin previewing the cards. Notice that only one form per page is shown as previously defined on the **Main** tab.
Press:	**Ctrl+PgDn**	To display the second form. Use Ctrl+PgDn to page through the remaining forms.
Click:	**Close**	To close the Preview window.

Press: **Ctrl+S**   To save the form.

Click: To close the Forms Writer window.

In Summary

Congratulations!! You have just completed the Tabs3 Report Writer Tutorial. You have learned how to create Tabs3 report definitions and form definitions, how to print the definitions and how to print the reports and forms.

Now that you have completed this tutorial, you will be able to confidently use the software to create your own reports and forms. If you have any questions or problems, give our Technical Support Staff a call at (402) 419-2210.

Appendixes

Appendix A
Report & Form Definition Fields

Field #	Field Name	Field Length	Justification	Type[1]	Notes
1	Client ID	12	—	—	Numeric Key Type - Right Justified Alpha or Mixed Key Type - Left
2	Name	50	Left	A	Prints Client Name as Last/First
3	Full Name	50	Left	A	Prints Client Name as First Last
4	Name Search	16	Left	A	
5	Address Line 1	35	Left	A	
6	Address Line 2	35	Left	A	
7	Address Line 3	35	Left	A	
8	City	20	Left	A	
9	State	3	Left	A	
10	Zip	10	Left	A	
11	Country	20	Left	A	
12	City/State/Zip	37	Left	A	
13	Contact Full Name	25	Left	A	Prints Contact Name as First Last
14	Phone 1	31	Left	A	
16	Phone 2	31	Left	A	
18	Phone 3	31	Left	A	
19	Phone 4	31	Left	A	
20	E-mail Address	100	Left	A	
21	Work Description	50	Left	A	An "*" will print if first character.
22	Misc. Line #1	50	Left	A	An "*" will print if first character.
23	Misc. Line #2	50	Left	A	An "*" will print if first character.
24	Misc. Line #3	50	Left	A	An "*" will print if first character.
25	Custom	50	Left	A	
26	Date Opened	10	Left	D	
27	Close Date	10	Left	D	mm/dd/yyyy = not closed
28	Rate Code	1	Left	N	Treated as alphanumeric for formulas.
29	Primary	3	Right	N	Treated as alphanumeric for formulas.
30	Sec.	3	Right	N	Treated as alphanumeric for formulas.
31	Orig.	3	Right	N	Treated as alphanumeric for formulas.
32	Category	3	Right	N	Treated as alphanumeric for formulas.

[1] Type of Field: A = alphanumeric, N = numeric, D = date, C = decimal.

Field #	Field Name	Field Length	Justification	Type[1]	Notes
33	Primary Initials	3	Left	A	
34	Sec. Initials	3	Left	A	
35	Orig. Initials	3	Left	A	
36	Primary Name	35	Left	A	Source = timekeeper file
37	Sec. Name	35	Left	A	Source = timekeeper file
38	Orig. Name	35	Left	A	Source = timekeeper file
39	Category Desc.	30	Left	A	Source = category file
40	Client Notes	—	Left	A	Client Notes wrap within the designated Column Width (maximum of 999). The Client Notes field is available on report definitions only.
41	Location	8	Left	A	
42	Location Description	40	Left	A	
43	Budget Hours	11	Right	C	
44	Budget Amount	11	Right	C	
45	Billing Notes and Instructions	—	Left	A	Billing Notes and Instructions wrap within the designated Column Width (maximum of 999). The Billing Notes and Instructions field is available on report definitions only.
46	Beginning Statement Notes	—	Left	A	Beginning Statement Notes wrap within the designated Column Width (maximum of 999). The Beginning Statement Notes field is available on report definitions only.
47	Ending Statement Notes	—	Left	A	Ending Statement Notes wrap within the designated Column Width (maximum of 999). The Ending Statement Notes field is available on report definitions only.
48	Discount Type	1	Left	A	
49	Discount Amt/Perc	11	Right	C	
50	Inactive	1	Left	A	
51	Secure Client	1	Left	A	
52	Progress Billing	1	Left	A	
53	Bill On Demand	1	Left	A	
54	Release To Bill	1	Left	A	
55	Task Based Billing	1	Left	A	
56	Billing Frequency	8	Left	A	
57	Draft Template	8	Left	A	
58	Final Template	8	Left	A	
59	Fin. Charge Option	3	Left	A	0-999 or N.
60	Fin. Chg. Code	1	Left	A	
61	Fee Tax Code	1	Left	A	
62	Expense Tax Code	1	Left	A	

[1] Type of Field: A = alphanumeric, N = numeric, D = date, C = decimal.

Field #	Field Name	Field Length	Justification	Type[1]	Notes
63	Advance Tax Code	1	Left	A	
64	Recpt Alloc by Inv	1	Left	A	
65	Bill/Non-bill Code	1	Left	A	
66	Bill To Option	1	Left	A	
67	Bill To Full Name	35	Left	A	
68	Bill To Addr Line #1	35	Left	A	
69	Bill To Addr Line #2	35	Left	A	
70	Bill To Addr Line #3	35	Left	A	
71	Bill To City/State/Zip	37	Left	A	
72	Bill To City	20	Left	A	
73	Bill To State	3	Left	A	
74	Bill To Zip	10	Left	A	
75	Bill To Country	20	Left	A	
76	R/A Billed Hours	11	Right	C	See Footnote 2.
77	R/A Billed Amount	11	Right	C	See Footnote 2.
78	R/A Write Off	11	Right	C	See Footnote 2.
79	R/A Paid Amount	11	Right	C	See Footnote 2.
80	Hours to Bill	11	Right	C	See Footnote 3. Select WIP, Archive or both. Does not include deleted transactions or progress fee transactions (Type 6). Credit transactions are included.
81	Hours Worked	11	Right	C	
82	Fee Transactions	11	Right	C	See Footnote 3. Select WIP, Archive or both. Does not include deleted transactions or progress fee transactions (Type 6). Credit transactions are included.
83	Expense Transactions	11	Right	C	See Footnote 3. Select WIP, Archive or both. Does not include deleted transactions. Credit transactions are included.
84	Advance Transactions	11	Right	C	See Footnote 3. Select WIP, Archive or both. Does not include deleted transactions. Credit transactions are included.
85	Payments	11	Right	C	See Footnote 3. Select WIP, Archive or both. Always a positive number.
86	Hours Billed	11	Right	C	See Footnote 3.
87	Fee Amount Billed	11	Right	C	See Footnote 3.

[1] Type of Field: A = alphanumeric, N = numeric, D = date, C = decimal.

[2] This information is based on the Allocation Date.

[3] Use of a field in a formula vs. a column which is defined as that same field in a formula may not yield the same values. This is due to the fact that when defining columns that use these fields, you have the ability to specify selection parameters, such as beginning and ending date, tcode, timekeeper, etc. However, you cannot specify selection parameters when using a field in a formula. The same situation exists when using a field instead of a column as a selection criteria on the **Query** tab.

Field #	Field Name	Field Length	Justification	Type[1]	Notes
88	Fee Write-Up	11	Right	C	See Footnote 3.
89	Fee Write-Down	11	Right	C	See Footnote 3.
90	Fee Write Off	11	Right	C	See Footnote 3.
91	Fee Tax Billed	11	Right	C	See Footnote 3.
92	Fee Tax Write Off	11	Right	C	See Footnote 3.
93	Expense Amount Billed	11	Right	C	See Footnote 3.
94	Expense Write-Up	11	Right	C	See Footnote 3.
95	Expense Write-Down	11	Right	C	See Footnote 3.
96	Expense Write Off	11	Right	C	See Footnote 3.
97	Expense Tax Billed	11	Right	C	See Footnote 3.
98	Expense Tax Write Off	11	Right	C	See Footnote 3.
99	Advance Amount Billed	11	Right	C	See Footnote 3.
100	Advance Write-Up	11	Right	C	See Footnote 3.
101	Advance Write-Down	11	Right	C	See Footnote 3.
102	Advance Write Off	11	Right	C	See Footnote 3.
103	Advance Tax Billed	11	Right	C	See Footnote 3.
104	Advance Tax Write Off	11	Right	C	See Footnote 3.
105	Fin. Charge Billed	11	Right	C	See Footnote 3.
106	Fin. Charge Write Off	11	Right	C	See Footnote 3.
107	Progress Billed	11	Right	C	See Footnote 3.
108	Progress Paid	11	Right	C	Calculated from Progress Billed and remaining due amounts.
109	Regular Payments	11	Right	C	These payments are processed payments taken from the Client Ledger file. Includes reversed payments.
110	Fee Payments	11	Right	C	These payments are processed payments taken from the Client Ledger file. Includes reversed payments.
111	Expense Payments	11	Right	C	These payments are processed payments taken from the Client Ledger file. Includes reversed payments.
112	Advance Payments	11	Right	C	These payments are processed payments taken from the Client Ledger file. Includes reversed payments.
113	Last Statement Date	10	Left	D	This information is taken from the Client Ledger file.

[1] Type of Field: A = alphanumeric, N = numeric, D = date, C = decimal.

[3] Use of a field in a formula vs. a column which is defined as that same field in a formula may not yield the same values. This is due to the fact that when defining columns that use these fields, you have the ability to specify selection parameters, such as beginning and ending date, tcode, timekeeper, etc. However, you cannot specify selection parameters when using a field in a formula. The same situation exists when using a field instead of a column as a selection criteria on the **Query** tab.

Field #	Field Name	Field Length	Justification	Type[1]	Notes
114	Last Payment Date	10	Left	D	Uses both the client ledger and work-in-process files. All payments in the client ledger file are eligible; however, only WIP payments through the report date are eligible.
115	Last Payment Amount	11	Right	C	Always a positive number. Total payments on Last Payment Date.
116	Fees Due	11	Right	C	Includes WIP payments through report date.
117	Expenses Due	11	Right	C	Includes WIP payments through report date.
118	Advances Due	11	Right	C	Includes WIP payments through report date.
119	Fin. Charge Due	11	Right	C	Includes WIP payments through report date.
120	Balance Due	11	Right	C	Includes WIP payments through report date.
121	Fund Balance	11	Right	C	
122	Fund Minimum Balance	11	Right	C	
123	Fund Target Balance	11	Right	C	
124	Fund Application	1	Left	A	
125	Fund Format	1	Left	A	
126	Past Due 0-30	11	Right	C	Includes WIP payments through report date. Actual past due period depends on ageing periods in Customization. Uses report date as a basis for calculating ageing periods. Also includes excess payments.
127	Past Due 31-60	11	Right	C	Actual past due period depends on ageing periods in Customization. Uses report date as a basis for calculating ageing periods.
128	Past Due 61-90	11	Right	C	Actual past due period depends on ageing periods in Customization. Uses report date as a basis for calculating ageing periods.
129	Past Due 91-120	11	Right	C	Actual past due period depends on ageing periods in Customization. Uses report date as a basis for calculating ageing periods.
130	Past Due 121-180	11	Right	C	Actual past due period depends on ageing periods in Customization. Uses report date as a basis for calculating ageing periods.
131	Past Due 181+	11	Right	C	Actual past due period depends on ageing periods in Customization. Uses report date as a basis for calculating ageing periods.

[1] Type of Field: A = alphanumeric, N = numeric, D = date, C = decimal.

Field #	Field Name	Field Length	Justification	Type[1]	Notes
132	Formula	—	—	—	Formulas are available in Report Definitions only. Formulas can be either numeric or alphanumeric. Numeric formulas are right justified. Alpha formulas are left justified. Alphanumeric fields, numeric fields and date fields can be used in string formulas. Decimal fields can be used in math formulas.
133	Text	—	Left	A	Text fields are available in Form Definitions only.

Appendix B
dBase III Field Names

Field #	Field Name	dBase III Field Name
1	Client ID[1]	CLIENT
2	Name	NAME_L_F
3	Full Name	NAME_F_L
4	Name Search	NAMESRCH
5	Address Line 1	ADDR_1
6	Address Line 2	ADDR_2
7	Address Line 3	ADDR_3
8	City	CITY
9	State	STATE
10	Zip	ZIP
11	Country	COUNTRY
12	City/State/Zip	CTY_ST_ZIP
13	Contact Full Name	CONTACT
14	Phone 1	PHONE_1
16	Phone 2	PHONE_2
18	Phone 3	PHONE_3
19	Phone 4	PHONE_4
20	E-mail Address	E_MAIL_ADDRESS
21	Work Description	WORK_DESC
22	Misc. Line #1	MISC_1
23	Misc. Line #2	MISC_2
24	Misc. Line #3	MISC_3
25	Custom	*not available*
26	Date Opened	OPEN_DATE
27	Close Date	CLOSE_DATE
28	Rate Code	RATE_CODE
29	Primary	PRIM_EMPL
30	Sec.	SEC_EMPL
31	Orig.	ORIG_EMPL
32	Category	CATEGORY

[1] The actual field name and dBase III field name will be based on the profession customization labels specified in Tabs3 Customization. The field names shown are based on the default values. For the dBase III field name, the first 10 characters of the column heading will be used. Spaces and all invalid characters will be replaced with the underscore ("_") character. Valid dBase characters for field names consist of A-Z, 0-9 and the underscore ("_") character.

Field #	Field Name	dBase III Field Name
33	Primary Initials	PRIM_INIT
34	Sec. Initials	SEC_INIT
35	Orig. Initials	ORIG_INIT
36	Primary Name	PRIM_NAME
37	Sec. Name	SEC_NAME
38	Orig. Name	ORIG_NAME
39	Category Desc.	CAT_DESC
40	Client Notes	*not available*
41	Location	LOCATION
42	Location Description	LOC_DESC
43	Budget Hours	BUD_HRS
44	Budget Amount	BUD_AMT
45	Billing Notes and Instructions	*not available*
46	Beginning Statement Notes	*not available*
47	Ending Statement Notes	*not available*
48	Discount Type	DISC_TYPE
49	Discount Amt/Perc	DISCOUNT
50	Inactive	INACTIVE
51	Secure Client	SECURE_CLI
52	Progress Billing	PROGRESS_B
53	Bill On Demand	BILL_ON_DE
54	Release To Bill	RELEASE_TO
55	Task Based Billing	TASK_BASED
56	Billing Frequency	BILL_FREQ
57	Draft Template	DRAFT_TEMP
58	Final Template	FINAL_TEMP
59	Fin. Charge Option	FIN_CHG_OP
60	Fin. Chg. Code	FIN_CHG_CD
61	Fee Tax Code	FEE_TAX_CD
62	Expense Tax Code	EXP_TAX_CD
63	Advance Tax Code	ADV_TAX_CD
64	Recpt Alloc by Inv	RA_BY_INV
65	Bill/Non-bill Code	BIL_NONBIL
66	Bill To Option	BILLTO_OP
67	Bill To Full Name	BILLTO_NAM
68	Bill To Addr Line #1	BILLTO_AD1
69	Bill To Addr Line #2	BILLTO_AD2

Note: The dBase III field names shown above will be used for the dBase III output format file. For formula fields, the first 10 characters of the column heading will be used. Spaces and all invalid characters will be replaced with the underscore ("_") character. Valid dBase characters for field names consist of A-Z, 0-9 and the underscore ("_") character. If the column heading begins with a number, the letter "A" will be added to the front of the field name. If the column header is blank, the letter "A" will be used as the field name. The Tabs3 Report Writer software does not check for duplicate field names.

Field #	Field Name	dBase III Field Name
70	Bill To Addr Line #3	BILLTO_AD3
71	Bill To City/State/Zip	BILLTO_CSZ
72	Bill To City	BILL_TO_CI
73	Bill To State	BILL_TO_ST
74	Bill To Zip	BILL_TO_ZI
75	Bill To Country	BILL_TO_CO
76	R/A Billed Hours	BILLED_HOURS
77	R/A Billed Amount	AMOUNT
78	R/A Write Off	AMOUNT (ALLOC_TYPE=W)
79	R/A Paid Amount	RA_PAID
80	Hours to Bill	WIP_HRS
81	Hours Worked	HRS_WORK
82	Fee Transactions	FEE_WIP
83	Expense Transactions	EXP_WIP
84	Advance Transactions	ADV_WIP
85	Payments	WIP_PYMTS
86	Hours Billed	HRS_BILLED
87	Fee Amount Billed	FEE_BILLED
88	Fee Write-Up	FEE_UP
89	Fee Write-Down	FEE_DOWN
90	Fee Write Off	FEE_WTOFF
91	Fee Tax Billed	BLFEE_TAX
92	Fee Tax Write Off	FTAX_WTOFF
93	Expense Amount Billed	EXP_BILLED
94	Expense Write-Up	EXP_UP
95	Expense Write-Down	EXP_DOWN
96	Expense Write Off	EXP_WTOFF
97	Expense Tax Billed	BLEXP_TAX
98	Expense Tax Write Off	ETAX_WTOFF
99	Advance Amount Billed	ADV_BILLED
100	Advance Write-Up	ADV_UP
101	Advance Write-Down	ADV_DOWN
102	Advance Write Off	ADV_WTOFF
103	Advance Tax Billed	BLADV_TAX
104	Advance Tax Write Off	ATAX_WTOFF
105	Fin. Charge Billed	FIN_BILLED
106	Fin. Charge Write Off	FIN_WTOFF
107	Progress Billed	PROG_BILL
108	Progress Paid	PROG_PAID
109	Regular Payments	REG_PYMTS

Field #	Field Name	dBase III Field Name
110	Fee Payments	FEE_PYMTS
111	Expense Payments	EXP_PYMTS
112	Advance Payments	ADV_PYMTS
113	Last Statement Date	LAST_STMT
114	Last Payment Date	LAST_PYMT
115	Last Payment Amount	LST_PY_AMT
116	Fees Due	FEES_DUE
117	Expenses Due	EXPS_DUE
118	Advances Due	ADVS_DUE
119	Fin. Charge Due	FIN_DUE
120	Balance Due	BAL_DUE
121	Fund Balance	FUND_BAL
122	Fund Minimum Balance	FUND_MIN_B
123	Fund Target Balance	FUND_TARGE
124	Fund Application	FIMD_APPLI
125	Fund Format	FUND_FORMA
126	Past Due 0-30	PAST_DUE_1
127	Past Due 31-60	PAST_DUE_2
128	Past Due 61-90	PAST_DUE_3
129	Past Due 91-120	PAST_DUE_4
130	Past Due 121-180	PAST_DUE_5
131	Past Due 181+	PAST_DUE_6
132	Formula	See Note

Appendix C
Microsoft Word Field Names

Field #	Field Name
1	Client ID[1]
2	Name
3	Full Name
4	Name Search
5	Address Line 1
6	Address Line 2
7	Address Line 3
8	City
9	State
10	Zip
11	Country
12	City/State/Zip
13	Contact Full Name
14	Phone 1
16	Phone 2
18	Phone 3
19	Phone 4
20	E-mail Address
21	Work Description
22	Misc. Line #1
23	Misc. Line #2
24	Misc. Line #3
25	Custom
26	Date Opened
27	Close Date
28	Rate Code
29	Primary
30	Sec.
31	Orig.
32	Category
33	Primary Initials

[1] The actual field name will be based on the profession customization labels specified in Tabs3 Customization. The field names shown are based on the default values.

Field #	Field Name
34	Sec. Initials
35	Orig. Initials
36	Primary Name
37	Sec. Name
38	Orig. Name
39	Category Desc.
40	Client Notes *(not available)*
41	Location
42	Location Description
43	Budget Hours
44	Budget Amount
45	Billing Notes and Instructions *(not available)*
46	Beginning Statement Notes *(not available)*
47	Ending Statement Notes *(not available)*
48	Discount Type
49	Discount Amt/Perc
50	Inactive
51	Secure Client
52	Progress Billing
53	Bill On Demand
54	Release To Bill
55	Task Based Billing
56	Billing Frequency
57	Draft Template
58	Final Template
59	Fin. Charge Option
60	Fin. Chg. Code
61	Fee Tax Code
62	Expense Tax Code
63	Advance Tax Code
64	Recpt Alloc by Inv
65	Bill/Non-bill Code
66	Bill To Option
67	Bill To Full Name
68	Bill To Addr Line #1
69	Bill To Addr Line #2
70	Bill To Addr Line #3
71	Bill To City/State/Zip
72	Bill To City
73	Bill To State
74	Bill To Zip
75	Bill To Country
76	R/A Billed Hours

Field #	Field Name
77	R/A Billed Amount
78	R/A Write Off
79	R/A Paid Amount
80	Hours to Bill
81	Hours Worked
82	Fee Transactions
83	Expense Transactions
84	Advance Transactions
85	Payments
86	Hours Billed
87	Fee Amount Billed
88	Fee Write-Up
89	Fee Write-Down
90	Fee Write Off
91	Fee Tax Billed
92	Fee Tax Write Off
93	Expense Amount Billed
94	Expense Write-Up
95	Expense Write-Down
96	Expense Write Off
97	Expense Tax Billed
98	Expense Tax Write Off
99	Advance Amount Billed
100	Advance Write-Up
101	Advance Write-Down
102	Advance Write Off
103	Advance Tax Billed
104	Advance Tax Write Off
105	Fin. Charge Billed
106	Fin. Charge Write Off
107	Progress Billed
108	Progress Paid
109	Regular Payments
110	Fee Payments
111	Expense Payments
112	Advance Payments
113	Last Statement Date
114	Last Payment Date
115	Last Payment Amount
116	Fees Due
117	Expenses Due
118	Advances Due
119	Fin. Charge Due

Field #	Field Name
120	Balance Due
121	Fund Balance
122	Fund Minimum Balance
123	Fund Target Balance
124	Fund Application
125	Fund Format
126	Past Due 0-30[2]
127	Past Due 31-60[2]
128	Past Due 61-90[2]
129	Past Due 91-120[2]
130	Past Due 121-180[2]
131	Past Due 181+[2]
132	Formula

[2] The actual ageing periods will be based on the ageing periods defined in Tabs3 Customization. If not all ageing periods are defined, the system will output "not used" for the field name.

Sample Reports

The following section contains printouts of the predefined reports, report definitions, forms and form definitions that are included with the Tabs3 Report Writer.

Sample Reports

Sample Forms

Sample Reports

Accounts Receivable for Clients Whose 91+ Days
Past Due Balance Is Greater Than 50% Of Total A/R
Burns, Jensen & Powers, P.C.

Client Name	Client ID	Phone 1	Balance Due	Total Past Due 91+	Percent 91+ Days
White/Kelly	850.00	402-474-4336	1,436.50	1,243.30	86.55%
Jefferson Insurance Co.	200.01	402-464-2200	1,387.00	864.00	62.29%
Ace Manufacturing Company	600.00	402-435-1739	1,118.98	755.00	67.47%
Barrett/Karen	101.00	402-466-1234	747.50	570.86	76.37%
Ace Manufacturing Company	600.02	402-435-1739	681.29	405.00	59.45%
Ace Manufacturing Company	600.01	402-435-1739	589.01	312.78	53.10%
Kiltzer/George	402.00	402-467-3391	530.25	530.25	100.00%
Lutz/Jody	400.00	402-598-2354	487.40	315.00	64.63%
Carter/Arthur J.	350.00	402-438-8424	425.00	425.00	100.00%
Harrison/Bradley	751.00	204-939-4545	50.93	50.42	99.00%
Sherman/Natalie K.	900.00	402-465-7030	7.98	7.98	100.00%
Grand Totals			7,461.84	5,479.59	

Accounts Receivable 91 Days Past Due That Are Greater Than 50% of Total A/R

Report Name: AR90.T3R

This report shows clients whose Past Due 91+ portion of their Balance Due is over 50% of their entire balance due.

The column heading separator is the "=" character. "Spacer" columns of three characters each are inserted between the Client ID and Phone No. columns and the Phone No. and Balance Due columns. "Spacer" columns of two characters each are inserted between the Balance Due and Total Past Due 91+ and the Total Past Due 91+ and Percent 91+ Days columns. The Report Writer software automatically inserts one blank space between columns. The "spacer" columns are not required. They were added to spread out the columns.

The Balance Due column is Tabs3 field #116. The Total Past Due 91+ column is a formula field that is calculated by adding Tabs3 fields #125, 126 and 127 (Past Due 91-120, Past Due 121-180 And Past Due 181+). The Percent 91+ Days column is calculated by dividing the "Total Past Due 91+" column (i.e., column 8) by field #116 (i.e., Balance Due). This percentage could also have been calculated by dividing the "Total Past Due 91+" column by column 6 (i.e., Balance Due). The resulting decimal quotient is converted to a percentage by using the percentage operator in the formula.

The only selection criteria used is that the client's "Past Due 91+" amount must be greater than half of the Balance Due (i.e., greater than 50%). This report was printed with the "Single File per Client" check box cleared.

The Balance Due and Total Past Due 91+ columns are totaled. A descending sort order based on the Balance Due is specified.

Report Name: AR90.T3R   **Automatic Report Width: 148**
Description: 91+ days A/R > 50% of total

Column Heading Separator (-,=,*):	=

Report Heading 1: Accounts Receivable for Clients Whose 91+ Days
Report Heading 2: Past Due Balance Is Greater Than 50% Of Total A/R

Print Page Numbers? (Y/N):	Y
Print Totals Only? (Y/N):	N
Double Space the Report? (Y/N):	N
Print Commas in Amounts? (Y/N):	Y
Print Client Count? (Y/N):	N
Print Separator Line Between Clients (Y/N):	N

Column:	01	
Field:	002	Name
Print on Report? (Y/N):	Y	
Field Width:	50	
Column Heading 1:		
Column Heading 2:	Client Name	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	02	
Field:	001	Client ID
Print on Report? (Y/N):	Y	
Field Width:	12	
Column Heading 1:		
Column Heading 2:	Client ID	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	03	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	03	
Column Heading 1:		
Column Heading 2:		
Subtotal? (Y/N):	N	
Blank When Zero? (Y/N):	N	
Formula:	' '	

Column:	04	
Field:	014	Phone 1
Print on Report? (Y/N):	Y	
Field Width:	31	
Column Heading 1:		
Column Heading 2:	Phone 1	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Report Name: AR90.T3R   **Automatic Report Width: 148**
Description: 91+ days A/R > 50% of total

Column:	05	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	03	
Column Heading 1:		
Column Heading 2:		
Subtotal? (Y/N):	N	
Blank When Zero? (Y/N):	N	
Formula:	' '	

Column:	06	
Field:	120	Balance Due
Print on Report? (Y/N):	Y	
Field Width:	11	
Column Heading 1:		
Column Heading 2:	Balance Due	
Subtotal? (Y/N):	Y	
Blank When Zero? (Y/N):	N	

Column:	07	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	02	
Column Heading 1:		
Column Heading 2:		
Subtotal? (Y/N):	N	
Blank When Zero? (Y/N):	N	
Formula:	' '	

Column:	08	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	11	
Column Heading 1:	Total Past	
Column Heading 2:	Due 91+	
Subtotal? (Y/N):	Y	
Blank When Zero? (Y/N):	N	
Formula:	F129+F130+F131	

Column:	09	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	02	
Column Heading 1:		
Column Heading 2:		
Subtotal? (Y/N):	N	
Blank When Zero? (Y/N):	N	
Formula:	' '	

Report Name: AR90.T3R   **Automatic Report Width: 148**
Description: 91+ days A/R > 50% of total

Column:	10	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	10	
Column Heading 1:	Percent	
Column Heading 2:	91+ Days	
Subtotal? (Y/N):	N	
Blank When Zero? (Y/N):	N	
Formula:	C8/F120%	

Column:	11	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	2	
Column Heading 1:		
Column Heading 2:		
Subtotal? (Y/N):	N	
Blank When Zero? (Y/N):	N	
Formula:	' '	

*** Report Selection Criteria ***

1)   Column 10 Greater Than 50.00

Primary Sort Column:	6	Primary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		

Secondary Sort Column:	0	Secondary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		

Print Subtotals Only? (Y/N):	N	Ascending or Descending Order? (A/D):	D

Accounts Receivable by Primary Attorney

Burns, Jensen & Powers, P.C.

Client Name	Current 0 - 30	Past 31+ 31 - 60	Past 61+ 61 - 90	Past 91+ 91 - 120	Past 121+ Over 120	Bal Due
Barrett/Karen	176.64	570.86	0.00	0.00	0.00	747.50
Harrison Investments	465.55	0.00	0.00	0.00	0.00	465.55
Harrison/Bradley	0.51	35.42	15.00	0.00	0.00	50.93
Kiltzer/George	0.00	530.25	0.00	0.00	0.00	530.25
Lyons/Mr. & Mrs. Art	0.00	0.00	17.50	133.00	0.00	150.50
Sherman/Natalie K.	0.00	7.98	0.00	0.00	0.00	7.98
White/Kelly	3.20	1,048.30	195.00	0.00	0.00	1,246.50
Total for Attorney DHB	645.90	2,192.81	227.50	133.00	0.00	3,199.21
Dawson/Charles L.	549.00	0.00	0.00	0.00	650.00	1,199.00
Lutz/Jody	47.40	315.00	0.00	0.00	0.00	362.40
Total for Attorney JPP	596.40	315.00	0.00	0.00	650.00	1,561.40
Ace Manufacturing Company	916.50	1,100.28	372.50	0.00	0.00	2,389.28
Carter/Arthur J.	0.00	425.00	0.00	0.00	0.00	425.00
Total for Attorney MLJ	916.50	1,525.28	372.50	0.00	0.00	2,814.28
ABC Insurance Company	0.00	0.00	0.00	0.00	0.00	0.00
Able/Paul & Mary	-100.00	0.00	0.00	0.00	0.00	-100.00
Federated Casualty, Ltd.	891.75	0.00	0.00	0.00	0.00	891.75
First National Bank	0.00	319.95	0.00	0.00	0.00	319.95
Jefferson Insurance Co.	5,408.59	73.52	861.00	0.00	0.00	6,343.11
Martin/Mary L. & Fred J.	0.00	0.00	0.00	0.00	0.00	0.00
McBride/John	1,391.88	0.00	0.00	0.00	0.00	1,391.88
Richardson/Harold	2,254.65	0.00	0.00	0.00	0.00	2,254.65
Total for Attorney RJB	9,846.87	393.47	861.00	0.00	0.00	11,101.34
Grand Totals	12,005.67	4,426.56	1,461.00	133.00	650.00	18,676.23

Accounts Receivable by Primary Attorney

Report Name: ARSUM.T3R

This report is similar to the same as the Summary Accounts Receivable Report provided in Tabs3. The Client ID is not included on this report. Excess payments are included on this report in the 0-30 column. The column heading separator is the "-" character. All columns are totaled. All columns are taken directly from a Tabs3 field with the exception of the Past 121+/Over 120 column. This column is calculated by adding the Tabs3 fields for Past Due 121-180 and Past Due 181+ (Tabs3 field #'s 126 and 127).

The clients are printed by primary attorney by client name in ascending order. A primary sort of primary attorney initials is selected along with a secondary sort of client name. No subtotal description is specified for the secondary sort.

No selection criteria is specified.

Report Name: ARSUM.T3R   **Automatic Report Width: 106**
Description: Summary A/R report

Column Heading Separator (-,=,*):	-

Report Heading 1: Accounts Receivable by Primary Attorney
Report Heading 2:

Print Page Numbers? (Y/N):	Y
Print Totals Only? (Y/N):	N
Double Space the Report? (Y/N):	N
Print Commas in Amounts? (Y/N):	Y
Print Client Count? (Y/N):	N
Print Separator Line Between Clients (Y/N):	N

Column:	01
Field:	002 Name
Print on Report? (Y/N):	Y
Field Width:	40
Column Heading 1:	
Column Heading 2:	Client Name
Subtotal? (Y/N):	Y
Print on Secondary subtotal line? (Y/N):	Y

Column:	02
Field:	126 Past Due 0-30
Print on Report? (Y/N):	Y
Field Width:	10
Column Heading 1:	Current
Column Heading 2:	0 - 30
Subtotal? (Y/N):	Y
Blank When Zero? (Y/N):	N

Column:	03
Field:	127 Past Due 31-60
Print on Report? (Y/N):	Y
Field Width:	10
Column Heading 1:	Past 31+
Column Heading 2:	31 - 60
Subtotal? (Y/N):	Y
Blank When Zero? (Y/N):	N

Column:	04
Field:	128 Past Due 61-90
Print on Report? (Y/N):	Y
Field Width:	10
Column Heading 1:	Past 61+
Column Heading 2:	61 - 90
Subtotal? (Y/N):	Y
Blank When Zero? (Y/N):	N

Report Name: ARSUM.T3R   **Automatic Report Width: 106**
Description: Summary A/R report

Column:	05
Field:	129 Past Due 91-120
Print on Report? (Y/N):	Y
Field Width:	10
Column Heading 1:	Past 91+
Column Heading 2:	91 - 120
Subtotal? (Y/N):	Y
Blank When Zero? (Y/N):	N

Column:	06
Field:	132 Formula
Print on Report? (Y/N):	Y
Field Width:	10
Column Heading 1:	Past 121+
Column Heading 2:	Over 120
Subtotal? (Y/N):	Y
Blank When Zero? (Y/N):	N
Formula:	F130+F131

Column:	07
Field:	120 Balance Due
Print on Report? (Y/N):	Y
Field Width:	10
Column Heading 1:	
Column Heading 2:	Bal Due
Subtotal? (Y/N):	Y
Blank When Zero? (Y/N):	N

Column:	08
Field:	033 Primary Initials
Print on Report? (Y/N):	N
Field Width:	0
Column Heading 1:	
Column Heading 2:	
Subtotal? (Y/N):	N
Print on Secondary subtotal line? (Y/N):	N

*** Report Selection Criteria ***
NONE

Primary Sort Column:	8	Primary Subtotal? (Y/N):	Y
Subtotal Description:		Total for Attorney	
Heading:			
Page Control (0-9 Lines or P-Page Eject):		2	

Secondary Sort Column:	1	Secondary Subtotal? (Y/N):	Y
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):		0	

Print Subtotals Only? (Y/N):	Y	Ascending or Descending Order? (A/D):	A

Allocation of YTD Fee Receipts by Attorney
Burns, Jensen & Powers, P.C.

Client Name	Atty #1 Paid	Atty #2 Paid	Atty #3 Paid	Atty #4 Paid	Atty #5 Paid	Total Fee Receipts
ABC Insurance Company	0.00	0.00	0.00	0.00	0.00	0.00
Able/Paul & Mary	0.00	0.00	0.00	0.00	0.00	0.00
Ace Manufacturing Company	0.00	852.49	0.00	97.51	0.00	950.00
Ace Manufacturing Company	1,438.06	2,060.88	0.00	0.00	118.28	3,617.22
Ace Manufacturing Company	0.00	89.83	-102.33	0.00	0.00	-12.50
Barrett/Karen	0.00	0.00	177.29	-200.80	0.00	-23.51
Carter/Arthur J.	0.00	825.00	0.00	0.00	0.00	825.00
Dawson/Charles L.	255.00	0.00	0.00	0.00	372.69	627.69
Federated Casualty, Ltd.	0.00	0.00	0.00	0.00	0.00	0.00
First National Bank	0.00	0.00	0.00	0.00	0.00	0.00
Harrison Investments	0.00	0.00	0.00	0.00	0.00	0.00
Harrison/Bradley	0.00	0.00	0.00	0.00	0.00	0.00
Jefferson Insurance Co.	56.25	0.00	0.00	-56.25	0.00	0.00
Jefferson Insurance Co.	0.00	0.00	0.00	0.00	0.00	0.00
Jefferson Insurance Co.	0.00	0.00	0.00	0.00	0.00	0.00
Kiltzer/George	0.00	69.31	89.61	441.08	0.00	600.00
Lutz/Jody	0.00	0.00	375.78	0.00	204.12	579.90
Lyons/Mr. & Mrs. Art	0.00	0.00	0.00	151.90	0.00	151.90
Martin/Mary L. & Fred J.	0.00	0.00	0.00	0.00	0.00	0.00
McBride/John	1,662.33	0.00	0.00	0.00	0.00	1,662.33
Richardson/Harold	1,381.98	175.00	0.00	0.00	0.00	1,556.98
Sherman/Natalie K.	0.00	0.00	0.00	315.00	0.00	315.00
White/Kelly	0.00	0.00	32.20	67.80	0.00	100.00
Grand Totals	4,793.62	4,072.51	572.55	816.24	695.09	10,950.01

Allocation of YTD Fee Receipts by Attorney

Report Name: ALLOCATN.T3R

This report is a simple report that shows fee receipts by working timekeeper. The Receipt Allocation Paid Amount field is selected for each of five attorneys. The Total Fee Receipts is a formula that is calculated by adding the columns for each attorney. The Total Fee Receipts column could just as easily have been defined by specifying the Receipt Allocation Paid Amount field for timekeepers 1-5.

The clients are printed in alphabetical order. Subtotals for the numeric columns are defined. No selection criteria is specified.

Report Name: ALLOCATN.T3R   **Automatic Report Width: 137**
Description: Receipt Allocation by Attorney

Column Heading Separator (-,=,*): -

Report Heading 1: Allocation of YTD Fee Receipts by Attorney
Report Heading 2:

Print Page Numbers? (Y/N):	Y
Print Totals Only? (Y/N):	N
Double Space the Report? (Y/N):	N
Print Commas in Amounts? (Y/N):	Y
Print Client Count? (Y/N):	N
Print Separator Line Between Clients? (Y/N):	N

Column:	01	
Field:	001	Client ID
Print on Report? (Y/N):	Y	
Field Width:	12	
Column Heading 1:		
Column Heading 2:	Case ID	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	02	
Field:	002	Name
Print on Report? (Y/N):	Y	
Field Width:	40	
Column Heading 1:		
Column Heading 2:	Client Name	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	03			
Field:	079	R/A Paid Amount		
Print on Report? (Y/N):	Y			
Field Width:	11			
Column Heading 1:	Atty #1			
Column Heading 2:	Paid			
Subtotal? (Y/N):	Y			
Blank When Zero? (Y/N):	N			
Receipt Allocation Type:	Fees			
Beginning Timekeeper:	1	Ending Timekeeper:		1
Beginning Timekeeper Level:	1	Ending Timekeeper Level:		9
Include Fee Compensation Amount? (Y/N):	Y			
Receipt Allocation Period:	Current Reporting Year			

Report Name: ALLOCATN.T3R   **Automatic Report Width: 137**
Description: Receipt Allocation by Attorney

Column:	04			
Field:	079	R/A Paid Amount		
Print on Report? (Y/N):	Y			
Field Width:	11			
Column Heading 1:	Atty #2			
Column Heading 2:	Paid			
Subtotal? (Y/N):	Y			
Blank When Zero? (Y/N):	N			
Receipt Allocation Type:	Fees			
Beginning Timekeeper:	2	Ending Timekeeper:		2
Beginning Timekeeper Level:	1	Ending Timekeeper Level:		9
Include Fee Compensation Amount? (Y/N):	Y			
Receipt Allocation Period:	Current Reporting Year			

Column:	05			
Field:	079	R/A Paid Amount		
Print on Report? (Y/N):	Y			
Field Width:	11			
Column Heading 1:	Atty #3			
Column Heading 2:	Paid			
Subtotal? (Y/N):	Y			
Blank When Zero? (Y/N):	N			
Receipt Allocation Type:	Fees			
Beginning Timekeeper:	3	Ending Timekeeper:		3
Beginning Timekeeper Level:	1	Ending Timekeeper Level:		9
Include Fee Compensation Amount? (Y/N):	Y			
Receipt Allocation Period:	Current Reporting Year			

Column:	06			
Field:	079	R/A Paid Amount		
Print on Report? (Y/N):	Y			
Field Width:	11			
Column Heading 1:	Atty #4			
Column Heading 2:	Paid			
Subtotal? (Y/N):	Y			
Blank When Zero? (Y/N):	N			
Receipt Allocation Type:	Fees			
Beginning Timekeeper:	4	Ending Timekeeper:		4
Beginning Timekeeper Level:	1	Ending Timekeeper Level:		9
Include Fee Compensation Amount? (Y/N):	Y			
Receipt Allocation Period:	Current Reporting Year			

Report Name: ALLOCATN.T3R   **Automatic Report Width: 137**
Description: Receipt Allocation by Attorney

Column:	07			
Field:	079	R/A Paid Amount		
Print on Report? (Y/N):	Y			
Field Width:	11			
Column Heading 1:	Atty #5			
Column Heading 2:	Paid			
Subtotal? (Y/N):	Y			
Blank When Zero? (Y/N):	N			
Receipt Allocation Type:	Fees			
Beginning Timekeeper:	5	Ending Timekeeper:		5
Beginning Timekeeper Level:	1	Ending Timekeeper Level:		9
Include Fee Compensation Amount? (Y/N):	Y			
Receipt Allocation Period:	Current Reporting Year			

Column:	08	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	11	
Column Heading 1:	Total Fee	
Column Heading 2:	Receipts	
Subtotal? (Y/N):	Y	
Blank When Zero? (Y/N):	N	
Formula:	C3+ C4+ C5+ C6+ C7	

Column:	09			
Field:	079	R/A Paid Amount		
Print on Report? (Y/N):	Y			
Field Width:	11			
Column Heading 1:	ALL			
Column Heading 2:				
Subtotal? (Y/N):	N			
Blank When Zero? (Y/N):	N			
Receipt Allocation Type:	Fees			
Beginning Timekeeper:	0	Ending Timekeeper:		99
Beginning Timekeeper Level:	1	Ending Timekeeper Level:		9
Include Fee Compensation Amount? (Y/N):	Y			
Receipt Allocation Period:	Current Reporting Month			

*** Report Selection Criteria ***
NONE

Primary Sort Column:	2	Primary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		
Secondary Sort Column:	0	Secondary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		
Print Subtotals Only? (Y/N):	N	Ascending or Descending Order? (A/D):	A

Preferred Client List Sorted By
Highest Fees Billed
Burns, Jensen & Powers, P.C.

Client Name	Prim TK #	Fees Billed	Expenses Billed	Advances Billed	Total Billed Fee+Exp+Adv
McBride/John	1	4,500.00	0.00	0.00	4,500.00
Ace Manufacturing Company	2	4,206.23	27.00	50.00	4,283.23
Richardson/Harold	1	3,721.00	81.50	0.00	3,802.50
Jefferson Insurance Co.	1	3,000.00	55.52	15.00	3,070.52
Dawson/Charles L.	5	2,875.00	65.50	25.00	2,965.50
Jefferson Insurance Co.	1	2,275.00	15.00	90.00	2,380.00
Barrett/Karen	4	2,016.25	43.88	0.00	2,060.13
Jefferson Insurance Co.	1	2,000.00	67.50	15.00	2,082.50
Ace Manufacturing Company	2	1,981.23	57.50	40.00	2,078.73
Carter/Arthur J.	2	1,350.00	10.25	0.00	1,360.25
White/Kelly	4	1,332.50	14.00	50.00	1,396.50
Ace Manufacturing Company	2	1,170.04	11.25	0.00	1,181.29
Kiltzer/George	4	1,071.25	9.00	50.00	1,130.25
Lutz/Jody	5	894.90	32.90	14.50	942.30
Federated Casualty, Ltd.	1	825.00	6.75	60.00	891.75
Grand Totals		33,218.40	497.55	409.50	34,125.45

Preferred Client List

Report Name: BESTCLNT.T3R

This report shows the most productive clients based on fees billed. The Fees Billed, Expenses Billed and Advances Billed columns are based on Tabs3 fields 84, 90 and 96 respectively. The Total Billed column simply adds the three billed columns. The numeric columns are totaled. When defining the billed columns, you have the ability to specify a beginning and ending date and whether you want billable, non-billable or all transactions. Two spacer columns are defined: one following the Primary Timekeeper # column and the other following the Fees Billed column.

The report selection criteria specifies that only clients whose Fees Billed is greater than $600.00 should be included on the report.

The clients are sorted in descending order by Fees Billed. No subtotaling is used.

Report Name: BESTCLNT.T3R   **Automatic Report Width: 106**
Description: Best clients by fees billed

Column Heading Separator (-,=,*): =

Report Heading 1: Preferred Client List Sorted By
Report Heading 2: Highest Fees Billed

Print Page Numbers? (Y/N):	Y
Print Totals Only? (Y/N):	N
Double Space the Report? (Y/N):	Y
Print Commas in Amounts? (Y/N):	Y
Print Client Count? (Y/N):	N
Print Separator Line Between Clients (Y/N):	N

Column:	01	
Field:	002	Name
Print on Report? (Y/N):	Y	
Field Width:	40	
Column Heading 1:		
Column Heading 2:	Client Name	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	02	
Field:	029	Primary
Print on Report? (Y/N):	Y	
Field Width:	4	
Column Heading 1:	Prim	
Column Heading 2:	TK #	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	03	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	3	
Column Heading 1:		
Column Heading 2:		
Subtotal? (Y/N):	N	
Blank When Zero? (Y/N):	N	
Formula:	' '	

Column:	04	
Field:	087	Fee Amount Billed
Print on Report? (Y/N):	Y	
Field Width:	11	
Column Heading 1:		
Column Heading 2:	Fees Billed	
Subtotal? (Y/N):	Y	
Blank When Zero? (Y/N):	N	
Beginning Date:	mm/dd/yyyy Ending Date:	mm/dd/yyyy
Billable, Non-billable or All (B/N/A):	B	

Report Name: BESTCLNT.T3R   **Automatic Report Width: 106**
Description: Best clients by fees billed

Column:	05	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	5	
Column Heading 1:		
Column Heading 2:		
Subtotal? (Y/N):	N	
Blank When Zero? (Y/N):	N	
Formula:	' '	

Column:	06	
Field:	093	Expense Amount Billed
Print on Report? (Y/N):	Y	
Field Width:	11	
Column Heading 1:	Expenses	
Column Heading 2:	Billed	
Subtotal? (Y/N):	Y	
Blank When Zero? (Y/N):	N	
Beginning Date:	mm/dd/yyyy Ending Date:	mm/dd/yyyy
Billable, Non-billable or All (B/N/A):	B	

Column:	07	
Field:	099	Advance Amount Billed
Print on Report? (Y/N):	Y	
Field Width:	11	
Column Heading 1:	Advances	
Column Heading 2:	Billed	
Subtotal? (Y/N):	Y	
Blank When Zero? (Y/N):	N	
Beginning Date:	mm/dd/yyyy Ending Date:	mm/dd/yyyy
Billable, Non-billable or All (B/N/A):	B	

Column:	08	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	14	
Column Heading 1:	Total Billed	
Column Heading 2:	Fee+Exp+Adv	
Subtotal? (Y/N):	Y	
Blank When Zero? (Y/N):	N	
Formula:	C4+C6+C7	

*** Report Selection Criteria ***

1)   Column 4 Greater Than 600.00

Report Name: BESTCLNT.T3R   **Automatic Report Width: 106**
Description: Best clients by fees billed

Primary Sort Column:	4	Primary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		
Secondary Sort Column:	1	Secondary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		
Print Subtotals Only? (Y/N):	N	Ascending or Descending Order? (A/D):	D

Alphabetical Client List Including A/R & WIP
By Originating Attorney
Burns, Jensen & Powers, P.C.

Client Name	Work Description	Contact Full Name	Phone #	Total A/R + WIP
Barrett/Karen	Apartment Management	Karen Barrett	402-466-1234	747.50
Harrison Investments	Purchase of Real Estate	Donald Harrison	402-466-7334	465.55
Harrison/Bradley	Purchase of Real Estate	Bradley Harrison	204-939-4545	50.93
Lutz/Jody	Manage trust account for Jody	Jody Lutz	402-598-2354	487.40
Lyons/Mr. & Mrs. Art	Audit of Federal Income Taxes	Art Lyons	402-545-2780	370.50
McBride/John	Management of Estate Trust	John McBride	402-425-2315	3,786.93
Total for Attorney DHB				5,908.81
Ace Manufacturing Company	General Legal Counsel	Al Jones	402-435-1739	1,118.98
Ace Manufacturing Company	Workers' compensation claim	Al Jones	402-435-1739	589.01
Ace Manufacturing Company	Maintenance of insurance policies	Al Jones	402-435-1739	681.29
Jefferson Insurance Co.	Automobile Accident	Mike Johnson	402-464-2200	1,387.00
Jefferson Insurance Co.	Hail Damage - Palmer farm	Mark Allen	402-464-2200	1,832.50
Kiltzer/George	Set up trust for children	George Kiltzer	402-467-3391	530.25
Total for Attorney MLJ				6,139.03
ABC Insurance Company	Death Benefits			0.00
Able/Paul & Mary	Parent's Estate	Paul Able	402-322-1459	-100.00
Carter/Arthur J.	Protection of New Wave Patent	Art Carter	402-438-8424	425.00
Dawson/Charles L.	Settlement of Grandfather's Estate	Chuck Dawson	714-884-7525	2,127.00
Federated Casualty, Ltd.	Andrew C. Gilbert v. Federated Casualty	Samantha Kessler	402-421-2850	2,088.25
First National Bank	General File	Lynn Traver	402-466-3785	319.95
Jefferson Insurance Co.	Acquisition of Mid-State Insurance	Mike Johnson	402-464-2200	3,238.61
Martin/Mary L. & Fred J.	Private Adoption	Mary Martin	402-731-8877	0.00
Richardson/Harold	Manage personal finances	Harold Richardson	716-253-4510	2,254.65
Sherman/Natalie K.	Divorce	Natalie Sherman	402-465-7030	51.73
White/Kelly	Divorce	Kelly White	402-474-4336	1,246.50
Total for Attorney RJB				11,651.69
Grand Totals				23,699.53

Client List Including A/R & Work-In-Process by Originating Attorney

Report Name: CLIST.T3R

This report is a list of clients along with the work description, contact name, phone #, and the combined accounts receivable and work-in-process. Commas are included in the amounts. The Total A/R & WIP is a formula column and is calculated by adding Fee Wip, Expense Wip, Advance Wip and the Balance Due (Tabs3 fields 79, 80, 81 and 116 respectively). A spacer column of 2 spaces is included following the Work Description column. The Client Name, Work Description and Contact Full Name fields are all truncated in order to keep the report width less than 132 columns.

No selection criteria is specified. The clients are printed in ascending alphabetical order by client name by originating timekeeper. This is accomplished by selecting a primary sort of originating timekeeper initials using subtotaling and a secondary sort of client name with no subtotaling.

Report Name: CLIST.T3R   **Automatic Report Width: 149**
Description: Alpha Client List w/ A/R & WIP

Column Heading Separator (-,=,*): -

Report Heading 1: Alphabetical Client List Including A/R & WIP
Report Heading 2: By Originating Attorney

Print Page Numbers? (Y/N):	Y
Print Totals Only? (Y/N):	N
Double Space the Report? (Y/N):	N
Print Commas in Amounts? (Y/N):	Y
Print Client Count? (Y/N):	N
Print Separator Line Between Clients (Y/N):	N

Column:	01	
Field:	002	Name
Print on Report? (Y/N):	Y	
Field Width:	40	
Column Heading 1:		
Column Heading 2:	Client Name	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	02	
Field:	021	Work Description
Print on Report? (Y/N):	Y	
Field Width:	35	
Column Heading 1:		
Column Heading 2:	Work Description	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	03	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	02	
Column Heading 1:		
Column Heading 2:		
Subtotal? (Y/N):	N	
Blank When Zero? (Y/N):	N	
Formula:	' '	

Column:	04	
Field:	013	Contact Full Name
Print on Report? (Y/N):	Y	
Field Width:	25	
Column Heading 1:		
Column Heading 2:	Contact Full Name	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Report Name: CLIST.T3R   **Automatic Report Width: 149**
Description: Alpha Client List w/ A/R & WIP

Column:	05	
Field:	014	Phone 1
Print on Report? (Y/N):	Y	
Field Width:	31	
Column Heading 1:		
Column Heading 2:	Phone 1	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	06	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	11	
Column Heading 1:	Total	
Column Heading 2:	A/R + WIP	
Subtotal? (Y/N):	Y	
Blank When Zero? (Y/N):	N	
Formula:	F82+F83+F84+F120	

Column:	07	
Field:	035	Orig. Initials
Print on Report? (Y/N):	N	
Field Width:	00	
Column Heading 1:		
Column Heading 2:		
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

*** Report Selection Criteria ***
NONE

Primary Sort Column:	7	Primary Subtotal? (Y/N):	Y
Subtotal Description:	Total for Attorney		
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		

Secondary Sort Column:	1	Secondary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		

Print Subtotals Only? (Y/N):	N	Ascending or Descending Order? (A/D):	A

Inactive Client List

Report Name: INACTIVE.T3R

This report is a listing of clients who have no accounts receivable and no work-in-process.

This report uses the dash character as a column heading separator. The Client ID, Client Name, Work Description and Billing Frequency columns are based on Tabs3 fields 1, 3, 21 and 54 respectively. A spacer column of 2 spaces is inserted following the Client ID column.

Nine selection criteria are specified. All of the following fields must be equal to "0.00" in order for the client to be selected: WIP Hours, Fee WIP, Expense WIP, Advance WIP, WIP Payments, Fees Due, Expenses Due, Advances Due and Finance Charge Due.

The clients are printed in ascending order by Client ID.

Report Name: INACTIVE.T3R   **Automatic Report Width: 128**
Description: All inactive clients

Column Heading Separator (-,=,*): -

Report Heading 1: Client Listing Of All Non-Active Clients
Report Heading 2: No Accounts Receivable And No Work-In-Process

Print Page Numbers? (Y/N):	Y
Print Totals Only? (Y/N):	N
Double Space the Report? (Y/N):	Y
Print Commas in Amounts? (Y/N):	N
Print Client Count? (Y/N):	N
Print Separator Line Between Clients (Y/N):	N

Column:	01	
Field:	001	Client ID
Print on Report? (Y/N):	Y	
Field Width:	12	
Column Heading 1:		
Column Heading 2:	Client ID	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	02	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	2	
Column Heading 1:		
Column Heading 2:		
Subtotal? (Y/N):	N	
Blank When Zero? (Y/N):	N	
Formula:	' '	

Column:	03	
Field:	003	Full Name
Print on Report? (Y/N):	Y	
Field Width:	50	
Column Heading 1:		
Column Heading 2:	Client Name	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	04	
Field:	021	Work Description
Print on Report? (Y/N):	Y	
Field Width:	50	
Column Heading 1:		
Column Heading 2:	Work Description	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Report Name: INACTIVE.T3R   **Automatic Report Width: 128**
Description: All inactive clients

Column:	05	
Field:	056	Billing Frequency
Print on Report? (Y/N):	Y	
Field Width:	10	
Column Heading 1:	Billing	
Column Heading 2:	Freq.	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

*** Report Selection Criteria ***

1)   Hours to Bill Equal To 0.00
2)   AND Fee Transactions Equal To 0.00
3)   AND Expense Transactions Equal To 0.00
4)   AND Advance Transactions Equal To 0.00
5)   AND Payments Equal To 0.00
6)   AND Fees Due Equal To 0.00
7)   AND Expenses Due Equal To 0.00
8)   AND Advances Due Equal To 0.00
9)   AND Fin. Charge Due Equal To 0.00

Primary Sort Column:	1	Primary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		

Secondary Sort Column:	0	Secondary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		

Print Subtotals Only? (Y/N):	N	Ascending or Descending Order? (A/D):	A

Client Status Report
Burns, Jensen & Powers, P.C.

Client ID	Client Name	Total WIP	% WIP of WIP+Billed	Total Billed	% Billed of WIP+Billed	Total WIP + Billed
100.00	Dawson/Charles L.	928.00	23.83%	2,965.50	76.17%	3,893.50
101.00	Barrett/Karen	0.00	0.00%	2,060.13	100.00%	2,060.13
102.00	Richardson/Harold	0.00	0.00%	3,802.50	100.00%	3,802.50
103.00	Martin/Mary L. & Fred J.	0.00	0.00%	0.00	0.00%	0.00
200.01	Jefferson Insurance Co.	0.00	0.00%	2,380.00	100.00%	2,380.00
200.02	Jefferson Insurance Co.	0.00	0.00%	2,082.50	100.00%	2,082.50
200.03	Jefferson Insurance Co.	115.00	3.61%	3,070.52	96.39%	3,185.52
300.00	McBride/John	2,395.05	34.74%	4,500.00	65.26%	6,895.05
350.00	Carter/Arthur J.	0.00	0.00%	1,360.25	100.00%	1,360.25
400.00	Lutz/Jody	125.00	11.71%	942.30	88.29%	1,067.30
402.00	Kiltzer/George	0.00	0.00%	1,130.25	100.00%	1,130.25
450.00	Able/Paul & Mary	0.00	0.00%	0.00	0.00%	0.00
500.00	Lyons/Mr. & Mrs. Art	220.00	37.45%	367.50	62.55%	587.50
550.00	Federated Casualty, Ltd.	1,196.50	57.30%	891.75	42.70%	2,088.25
600.00	Ace Manufacturing Company	0.00	0.00%	2,078.73	100.00%	2,078.73
600.01	Ace Manufacturing Company	0.00	0.00%	4,283.23	100.00%	4,283.23
600.02	Ace Manufacturing Company	0.00	0.00%	1,181.29	100.00%	1,181.29
700.00	First National Bank	0.00	0.00%	500.15	100.00%	500.15
750.00	Harrison Investments	0.00	0.00%	460.50	100.00%	460.50
751.00	Harrison/Bradley	0.00	0.00%	48.75	100.00%	48.75
800.00	ABC Insurance Company	0.00	0.00%	0.00	0.00%	0.00
850.00	White/Kelly	0.00	0.00%	1,396.50	100.00%	1,396.50
900.00	Sherman/Natalie K.	43.75	11.93%	322.98	88.07%	366.73
940.00	Young/Stacy	0.00	0.00%	0.00	0.00%	0.00
941.00	Stockton/Lyle P.	0.00	0.00%	0.00	0.00%	0.00
Grand Totals		5,023.30		35,825.33		40,848.63

Client Status Report

Report Name: STATUS.T3R

This report shows each client's work-in-process, billed amounts and the total work-in-process and billed amounts. Two percentage columns are shown. This report uses 6 non-printable columns. The Total WIP column is calculated by adding three previously defined non-printable columns of WIP Fees, WIP Expenses and WIP Advances. Three additional non-printable columns are defined, Fees Billed, Expenses Billed and Advances Billed. The first percentage column is calculated by dividing the Total WIP figure by the total of the Total WIP column and the billed columns. The percentage operator is used to convert the decimal to a percentage. The Total Billed column is calculated by adding the non-printable columns of Fees Billed, Expenses Billed and Advances Billed. The second percentage column is calculated by dividing the Total Billed figure by the total of the Total WIP column and the Total Billed column. The percentage operator is used to convert the decimal to a percentage.

The dash character is used for the column separator. Clients are printed in Client ID order. Commas are included in the report. No selection criteria is specified.

Tabs3 Report Definition
Jensen, Martin & Anderson, P.C.

Report Name: STATUS.T3R
Description: Client Status Report
Automatic Report Width: 126

Column Heading Separator (-,=,*):	-
Report Heading 1: Client Status Report	
Report Heading 2:	
Print Page Numbers? (Y/N):	Y
Print Totals Only? (Y/N):	N
Double Space the Report? (Y/N):	N
Print Commas in Amounts? (Y/N):	Y
Print Client Count? (Y/N):	N
Print Separator Line Between Clients (Y/N):	N
Column:	01
Field:	001 Client ID
Print on Report? (Y/N):	Y
Field Width:	12
Column Heading 1:	
Column Heading 2:	Client ID
Subtotal? (Y/N):	N
Print on Secondary subtotal line? (Y/N):	N
Column:	02
Field:	002 Name
Print on Report? (Y/N):	Y
Field Width:	50
Column Heading 1:	
Column Heading 2:	Client Name
Subtotal? (Y/N):	N
Print on Secondary subtotal line? (Y/N):	N
Column:	03
Field:	082 Fee Transactions
Print on Report? (Y/N):	N
Field Width:	0
Column Heading 1:	
Column Heading 2:	
Subtotal? (Y/N):	N
Blank When Zero? (Y/N):	N

Beginning Date:	mm/dd/yyyy	Ending Date:	mm/dd/yyyy
Beginning Date Entered:	mm/dd/yyyy	Ending Date Entered:	mm/dd/yyyy
Billable, Non-billable or All (B/N/A):	B		
Hold, Print/Save or All (H/P/A):	H		
WIP, Archive or Both (W/A/B):	W		
Beginning Tcode:	1	Ending Tcode:	999
Beginning Timekeeper:	1	Ending Timekeeper:	999
Beginning Timekeeper Level:	1	Ending Timekeeper Level:	9
Beginning Category:	1	Ending Category:	999
Beginning Stmt Date:	mm/dd/yyyy	Ending Stmt Date:	mm/dd/yyyy
Beginning User ID:		Ending User ID:	

Tabs3 Report Definition
Jensen, Martin & Anderson, P.C.

Report Name: STATUS.T3R
Description: Client Status Report
Automatic Report Width: 126

Column:	04
Field:	083 Expense Transactions
Print on Report? (Y/N):	N
Field Width:	0
Column Heading 1:	
Column Heading 2:	
Subtotal? (Y/N):	N
Blank When Zero? (Y/N):	N

Beginning Date:	mm/dd/yyyy	Ending Date:	mm/dd/yyyy
Beginning Date Entered:	mm/dd/yyyy	Ending Date Entered:	mm/dd/yyyy
Billable, Non-billable or All (B/N/A):	B		
Hold, Print/Save or All (H/P/A):	H		
WIP, Archive or Both (W/A/B):	W		
Beginning Tcode:	1	Ending Tcode:	999
Beginning Timekeeper:	0	Ending Timekeeper:	999
Beginning Timekeeper Level:	1	Ending Timekeeper Level:	9
Beginning Cost Type:	0	Ending Cost Type:	9
Beginning Stmt Date:	mm/dd/yyyy	Ending Stmt Date:	mm/dd/yyyy
Beginning User ID:		Ending User ID:	

Column:	05
Field:	084 Advance Transactions
Print on Report? (Y/N):	N
Field Width:	0
Column Heading 1:	
Column Heading 2:	
Subtotal? (Y/N):	N
Blank When Zero? (Y/N):	N

Beginning Date:	mm/dd/yyyy	Ending Date:	mm/dd/yyyy
Beginning Date Entered:	mm/dd/yyyy	Ending Date Entered:	mm/dd/yyyy
Billable, Non-billable or All (B/N/A):	B		
Hold, Print/Save or All (H/P/A):	H		
WIP, Archive or Both (W/A/B):	W		
Beginning Tcode:	1	Ending Tcode:	999
Beginning Timekeeper:	0	Ending Timekeeper:	999
Beginning Timekeeper Level:	1	Ending Timekeeper Level:	9
Beginning Cost Type:	0	Ending Cost Type:	9
Beginning Stmt Date:	mm/dd/yyyy	Ending Stmt Date:	mm/dd/yyyy
Beginning User ID:		Ending User ID:	

Column:	06
Field:	132 Formula
Print on Report? (Y/N):	Y
Field Width:	11
Column Heading 1:	
Column Heading 2:	Total WIP
Subtotal? (Y/N):	Y
Blank When Zero? (Y/N):	N
Formula:	C3+C4+C5

Report Name: STATUS.T3R   **Automatic Report Width: 126**
Description: Client Status Report

Column:	07
Field:	087 Fee Amount Billed
Print on Report? (Y/N):	N
Field Width:	0
Column Heading 1:	
Column Heading 2:	
Subtotal? (Y/N):	N
Blank When Zero? (Y/N):	N
Beginning Date:	mm/dd/yyyy Ending Date: mm/dd/yyyy
Billable, Non-billable or All (B/N/A):	B

Column:	08
Field:	093 Expense Amount Billed
Print on Report? (Y/N):	N
Field Width:	0
Column Heading 1:	
Column Heading 2:	
Subtotal? (Y/N):	N
Blank When Zero? (Y/N):	N
Beginning Date:	mm/dd/yyyy Ending Date: mm/dd/yyyy
Billable, Non-billable or All (B/N/A):	B

Column:	09
Field:	099 Advance Amount Billed
Print on Report? (Y/N):	N
Field Width:	0
Column Heading 1:	
Column Heading 2:	
Subtotal? (Y/N):	N
Blank When Zero? (Y/N):	N
Beginning Date:	mm/dd/yyyy Ending Date: mm/dd/yyyy
Billable, Non-billable or All (B/N/A):	B

Column:	10
Field:	132 Formula
Print on Report? (Y/N):	Y
Field Width:	11
Column Heading 1:	% WIP of
Column Heading 2:	WIP+Billed
Subtotal? (Y/N):	N
Blank When Zero? (Y/N):	N
Formula:	C6/(C6+C7+C8+C9)%

Column:	11
Field:	132 Formula
Print on Report? (Y/N):	Y
Field Width:	11
Column Heading 1:	Total
Column Heading 2:	Billed
Subtotal? (Y/N):	Y
Blank When Zero? (Y/N):	N
Formula:	C7+C8+C9

Report Name: STATUS.T3R   **Automatic Report Width: 126**
Description: Client Status Report

Column:	12
Field:	132 Formula
Print on Report? (Y/N):	Y
Field Width:	12
Column Heading 1:	% Billed of
Column Heading 2:	WIP+Billed
Subtotal? (Y/N):	N
Blank When Zero? (Y/N):	N
Formula:	C11/(C6+C11)%

Column:	13
Field:	132 Formula
Print on Report? (Y/N):	Y
Field Width:	11
Column Heading 1:	Total WIP
Column Heading 2:	+ Billed
Subtotal? (Y/N):	Y
Blank When Zero? (Y/N):	N
Formula:	C6+C11

*** Report Selection Criteria ***
NONE

Primary Sort Column:	1	Primary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):		1	
Secondary Sort Column:	0	Secondary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):		1	

Print Subtotals Only? (Y/N):	N	Ascending or Descending Order? (A/D):	A

```
Date: 11/17/2014                   Clients With Only Payments In WIP                        Page: 1
                                     Burns, Jensen & Powers, P.C.

                                                         Previous           WIP
              Client ID      Client Name                  Balance       Payments          Balance Due

              700.00         First National Bank           519.95         200.00              319.95

              402.00         Kiltzer/George               1130.25         600.00              530.25

              103.00         Martin/Mary L. & Fred J.         0.00        175.00             -175.00

              941.00         Stockton/Lyle P.                 0.00        500.00             -500.00
```

Payment Only Client Report

Report Name: WIPPAY.T3R

This report includes clients who have no transactions in WIP except for payments. A non-printable column of WIP Payments is defined so that an ending date of "RptDate" can be selected and the column can be used in the following formula column (i.e., Previous Balance). An ending date of "RptDate" indicates that the report date will be used. This feature allows you to run the report every month without having to edit the report definition. These clients are chosen by specifying that the non-printable WIP Payments column must be greater than 0 and WIP Hours, Fee WIP, Expense WIP and Advance WIP must each be equal to zero.

Two spacer columns are defined, one between the Client ID and Client Name

columns and the other between the WIP Payments and Balance Due column. The Previous Balance column is a formula column that is calculated by adding the Balance Due field to the WIP Payments column.

The dash character is used for the column separator. The clients are printed in ascending order by client name.

Report Name: WIPPAY.T3R   **Automatic Report Width: 87**
Description: WIP payments only clients

Column Heading Separator (-,=,*):	-

Report Heading 1: Clients With Only Payments In WIP	
Report Heading 2:	
Print Page Numbers? (Y/N):	Y
Print Totals Only? (Y/N):	N
Double Space the Report? (Y/N):	Y
Print Commas in Amounts? (Y/N):	N
Print Client Count? (Y/N):	N
Print Separator Line Between Clients (Y/N):	N

Column:	01	
Field:	001	Client ID
Print on Report? (Y/N):	Y	
Field Width:	12	
Column Heading 1:		
Column Heading 2:	Client ID	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	02	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	3	
Column Heading 1:		
Column Heading 2:		
Subtotal? (Y/N):	N	
Blank When Zero? (Y/N):	N	
Formula:	' '	

Column:	03	
Field:	002	Name
Print on Report? (Y/N):	Y	
Field Width:	30	
Column Heading 1:		
Column Heading 2:	Client Name	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Report Name: WIPPAY.T3R   **Automatic Report Width: 87**
Description: WIP payments only clients

Column:	04		
Field:	085	Payments	
Print on Report? (Y/N):	N		
Field Width:	0		
Column Heading 1:			
Column Heading 2:			
Subtotal? (Y/N):	N		
Blank When Zero? (Y/N):	N		
Beginning Date:	mm/dd/yyyy	Ending Date:	RptDate
Beginning Date Entered:	mm/dd/yyyy	Ending Date Entered:	mm/dd/yyyy
Hold, Print or All (H/P/A):	H		
WIP, Archive or Both (W/A/B):	W		
Beginning Tcode:	1	Ending Tcode:	999
Beginning Stmt Date:	mm/dd/yyyy	Ending Stmt Date:	mm/dd/yyyy
Beginning User ID:		Ending User ID:	

Column:	05	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	11	
Column Heading 1:	Previous	
Column Heading 2:	Balance	
Subtotal? (Y/N):	N	
Blank When Zero? (Y/N):	N	
Formula:	F120+C4	

Column:	06	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	11	
Column Heading 1:	WIP	
Column Heading 2:	Payments	
Subtotal? (Y/N):	N	
Blank When Zero? (Y/N):	N	
Formula:	C4	

Column:	07	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	3	
Column Heading 1:		
Column Heading 2:		
Subtotal? (Y/N):	N	
Blank When Zero? (Y/N):	N	
Formula:	' '	

Report Name: WIPPAY.T3R   **Automatic Report Width: 87**
Description: WIP payments only clients

Column:	08	
Field:	120	Balance Due
Print on Report? (Y/N):	Y	
Field Width:	11	
Column Heading 1:		
Column Heading 2:	Balance Due	
Subtotal? (Y/N):	N	
Blank When Zero? (Y/N):	N	

*** Report Selection Criteria ***

1)	Column 4 Greater Than 0.00
2)	AND Hours to Bill Equal To 0.00
3)	AND Fee Transactions Equal To 0.00
4)	AND Expense Transactions Equal To 0.00
5)	AND Advance Transactions Equal To 0.00

Primary Sort Column:	3	Primary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		
Secondary Sort Column:	0	Secondary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		
Print Subtotals Only? (Y/N):	N	Ascending or Descending Order? (A/D):	A

Monthly Productivity By Category
Burns, Jensen & Powers, P.C.

Category Description	Hours Billed	Fees Billed	Fee Write-Up	Fee Write-Down	Fee Write Off	Net Fees Billed
Personal Injury	1.83	276.23	1.20	0.52	0.00	276.23
Wills/Trusts/Estates	0.00	1,000.00	0.00	0.00	0.00	1,000.00
Workers' Compensation	1.83	276.23	1.20	0.52	0.00	276.23
Probate	4.00	600.00	0.00	0.00	0.00	600.00
Tax Law	16.25	3,006.25	0.00	0.00	0.00	3,006.25
Real Estate	2.00	445.50	175.50	0.00	0.00	445.50
Family Law	1.80	315.00	0.00	0.00	0.00	315.00
Business Law	1.84	276.29	1.04	2.40	0.00	276.29
Insurance Defense	3.75	825.00	0.00	0.00	0.00	825.00
Grand Totals	33.30	7,020.50	178.94	3.44	0.00	7,020.50

Monthly Productivity by Category

Report Name: MTDCAT.T3R

This report shows the billed productivity by category for each month. Note that a beginning date of "FirstDay" and an ending date of "RptDate" were specified for the Hours Billed column through the Fee Write-Off column. A beginning date of "FirstDay" indicates that the first day of the month for the month in the report date will be used. An ending date of "RptDate" indicates that the report date will be used. This feature allows you to run the report every month without having to edit the report definition.

The dash character is used for the column separator.

A non-printable column of Category is defined so it can be specified as the primary sort. Subtotaling by category is specified. Individual clients do not print on the report because the Print Subtotals Only check box is selected. Only clients who have Fees Billed greater than zero are included on the report.

Report Name: MTDCAT.T3R   **Automatic Report Width: 102**
Description: Monthly Category Productivity

Column Heading Separator (-,=,*): -	
Report Heading 1: Monthly Productivity By Category	
Report Heading 2:	
Print Page Numbers? (Y/N):	Y
Print Totals Only? (Y/N):	N
Double Space the Report? (Y/N):	N
Print Commas in Amounts? (Y/N):	Y
Print Client Count? (Y/N):	N
Print Separator Line Between Clients (Y/N):	N

Column:	01
Field:	039 Category Desc.
Print on Report? (Y/N):	Y
Field Width:	30
Column Heading 1:	
Column Heading 2:	Category Description
Subtotal? (Y/N):	Y
Print on Secondary subtotal line? (Y/N):	N

Column:	02		
Field:	086 Hours Billed		
Print on Report? (Y/N):	Y		
Field Width:	11		
Column Heading 1:	Hours		
Column Heading 2:	Billed		
Subtotal? (Y/N):	Y		
Blank When Zero? (Y/N):	N		
Beginning Date:	FirstDay	Ending Date:	RptDate
Billable, Non-billable or All (B/N/A):	B		

Column:	03		
Field:	087 Fee Amount Billed		
Print on Report? (Y/N):	Y		
Field Width:	11		
Column Heading 1:	Fees		
Column Heading 2:	Billed		
Subtotal? (Y/N):	Y		
Blank When Zero? (Y/N):	N		
Beginning Date:	FirstDay	Ending Date:	RptDate
Billable, Non-billable or All (B/N/A):	B		

Column:	04		
Field:	088 Fee Write-Up		
Print on Report? (Y/N):	Y		
Field Width:	11		
Column Heading 1:	Fee		
Column Heading 2:	Write-Up		
Subtotal? (Y/N):	Y		
Blank When Zero? (Y/N):	N		
Beginning Date:	FirstDay	Ending Date:	RptDate

Report Name: MTDCAT.T3R   **Automatic Report Width: 102**
Description: Monthly Category Productivity

Column:	05		
Field:	089 Fee Write-Down		
Print on Report? (Y/N):	Y		
Field Width:	11		
Column Heading 1:	Fee		
Column Heading 2:	Write-Down		
Subtotal? (Y/N):	Y		
Blank When Zero? (Y/N):	N		
Beginning Date:	FirstDay	Ending Date:	RptDate

Column:	06		
Field:	090 Fee Write Off		
Print on Report? (Y/N):	Y		
Field Width:	11		
Column Heading 1:	Fee		
Column Heading 2:	Write Off		
Subtotal? (Y/N):	Y		
Blank When Zero? (Y/N):	N		
Beginning Date:	FirstDay	Ending Date:	RptDate

Column:	07
Field:	032 Category
Print on Report? (Y/N):	N
Field Width:	0
Column Heading 1:	
Column Heading 2:	
Subtotal? (Y/N):	N
Print on Secondary subtotal line? (Y/N):	N

Column:	08
Field:	132 Formula
Print on Report? (Y/N):	Y
Field Width:	11
Column Heading 1:	Net Fees
Column Heading 2:	Billed
Subtotal? (Y/N):	Y
Blank When Zero? (Y/N):	N
Formula:	C3- C6

*** Report Selection Criteria ***

1) Column 3 Greater Than 0.00		

Primary Sort Column:	7	Primary Subtotal? (Y/N):		Y
Subtotal Description:				
Heading:				
Page Control (0-9 Lines or P-Page Eject):		1		
Secondary Sort Column:	0	Secondary Subtotal? (Y/N):		N
Subtotal Description:				
Heading:				
Page Control (0-9 Lines or P-Page Eject):		1		
Print Subtotals Only? (Y/N):	Y	Ascending or Descending Order? (A/D):		A

Work-In-Process By Working Attorney
Burns, Jensen & Powers, P.C.

Client	Atty #1 Fee WIP	Atty #2 Fee WIP	Atty #3 Fee WIP	Atty #4 Fee WIP	Total Fee WIP
Dawson/Charles L.	55.00	0.00	0.00	0.00	55.00
Federated Casualty, Ltd.	562.50	281.25	0.00	262.50	1106.25
Lutz/Jody	125.00	0.00	0.00	0.00	125.00
Lyons/Mr. & Mrs. Art	220.00	0.00	0.00	0.00	220.00
McBride/John	2312.50	0.00	0.00	0.00	2312.50
Sherman/Natalie K.	0.00	0.00	0.00	43.75	43.75
Stockton/Lyle P.	0.00	0.00	1168.00	0.00	1168.00
Grand Totals	3275.00	281.25	1168.00	306.25	5030.50

Work-In-Process by Working Attorney

Report Name: WIPWORK.T3R

This report shows all work-in-process by working attorney. Additional attorneys can be added as columns depending on how wide a report your printer can handle. If you have more working attorneys than will fit on the report, you can set up additional reports for the additional attorneys.

When selecting work-in-process figures, the Tabs3 Report Writer allows you to specify the beginning and ending transaction code, working timekeeper, category and date. Clients who have work-in-process of 0.00 or less are not included on the report. The clients are printed in ascending name order with no subtotaling. A column separator of "-" is used and commas are not included in the report.

Report Name: WIPWORK.T3R   **Automatic Report Width: 100**
Description: WIP By Working Attorney

Column Heading Separator (-,=,*):	-
Report Heading 1: Work-In-Process By Working Attorney	
Report Heading 2:	
Print Page Numbers? (Y/N):	Y
Print Totals Only? (Y/N):	N
Double Space the Report? (Y/N):	N
Print Commas in Amounts? (Y/N):	N
Print Client Count? (Y/N):	N
Print Separator Line Between Clients (Y/N):	N

Column:	01		
Field:	002	Name	
Print on Report? (Y/N):	Y		
Field Width:	40		
Column Heading 1:			
Column Heading 2:	Client		
Subtotal? (Y/N):	N		
Print on Secondary subtotal line? (Y/N):	N		

Column:	02		
Field:	082	Fee Transactions	
Print on Report? (Y/N):	Y		
Field Width:	11		
Column Heading 1:	Atty #1		
Column Heading 2:	Fee WIP		
Subtotal? (Y/N):	Y		
Blank When Zero? (Y/N):	N		
Beginning Date:	mm/dd/yyyy	Ending Date:	mm/dd/yyyy
Beginning Date Entered:	mm/dd/yyyy	Ending Date Entered:	mm/dd/yyyy
Billable, Non-billable or All (B/N/A):	B		
Hold, Print/Save or All (H/P/A):	H		
WIP, Archive or Both (W/A/B):	W		
Beginning Tcode:	1	Ending Tcode:	999
Beginning Timekeeper:	1	Ending Timekeeper:	1
Beginning Timekeeper Level:	1	Ending Timekeeper Level:	9
Beginning Category:	1	Ending Category:	999
Beginning Stmt Date:	mm/dd/yyyy	Ending Stmt Date:	mm/dd/yyyy
Beginning User ID:		Ending User ID:	

Report Name: WIPWORK.T3R   **Automatic Report Width: 100**
Description: WIP By Working Attorney

Column:	03		
Field:	082	Fee Transactions	
Print on Report? (Y/N):	Y		
Field Width:	11		
Column Heading 1:	Atty #2		
Column Heading 2:	Fee WIP		
Subtotal? (Y/N):	Y		
Blank When Zero? (Y/N):	N		
Beginning Date:	mm/dd/yyyy	Ending Date:	mm/dd/yyyy
Beginning Date Entered:	mm/dd/yyyy	Ending Date Entered:	mm/dd/yyyy
Billable, Non-billable or All (B/N/A):	B		
Hold, Print/Save or All (H/P/A):	H		
WIP, Archive or Both (W/A/B):	W		
Beginning Tcode:	1	Ending Tcode:	999
Beginning Timekeeper:	2	Ending Timekeeper:	2
Beginning Timekeeper Level:	1	Ending Timekeeper Level:	9
Beginning Category:	1	Ending Category:	999
Beginning Stmt Date:	mm/dd/yyyy	Ending Stmt Date:	mm/dd/yyyy
Beginning User ID:		Ending User ID:	

Column:	04		
Field:	082	Fee Transactions	
Print on Report? (Y/N):	Y		
Field Width:	11		
Column Heading 1:	Atty #3		
Column Heading 2:	Fee WIP		
Subtotal? (Y/N):	Y		
Blank When Zero? (Y/N):	N		
Beginning Date:	mm/dd/yyyy	Ending Date:	mm/dd/yyyy
Beginning Date Entered:	mm/dd/yyyy	Ending Date Entered:	mm/dd/yyyy
Billable, Non-billable or All (B/N/A):	B		
Hold, Print/Save or All (H/P/A):	H		
WIP, Archive or Both (W/A/B):	W		
Beginning Tcode:	1	Ending Tcode:	999
Beginning Timekeeper:	3	Ending Timekeeper:	3
Beginning Timekeeper Level:	1	Ending Timekeeper Level:	9
Beginning Category:	1	Ending Category:	999
Beginning Stmt Date:	mm/dd/yyyy	Ending Stmt Date:	mm/dd/yyyy
Beginning User ID:		Ending User ID:	

Report Name: WIPWORK.T3R   **Automatic Report Width: 100**
Description: WIP By Working Attorney

Column:	05		
Field:	082	Fee Transactions	
Print on Report? (Y/N):	Y		
Field Width:	11		
Column Heading 1:	Atty #4		
Column Heading 2:	Fee WIP		
Subtotal? (Y/N):	Y		
Blank When Zero? (Y/N):	N		
Beginning Date:	mm/dd/yyyy	Ending Date:	mm/dd/yyyy
Beginning Date Entered:	mm/dd/yyyy	Ending Date Entered:	mm/dd/yyyy
Billable, Non-billable or All (B/N/A):	B		
Hold, Print/Save or All (H/P/A):	H		
WIP, Archive or Both (W/A/B):	W		
Beginning Tcode:	1	Ending Tcode:	999
Beginning Timekeeper:	4	Ending Timekeeper:	4
Beginning Timekeeper Level:	1	Ending Timekeeper Level:	9
Beginning Category:	1	Ending Category:	999
Beginning Stmt Date:	mm/dd/yyyy	Ending Stmt Date:	mm/dd/yyyy
Beginning User ID:		Ending User ID:	

Column:	06	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	11	
Column Heading 1:	Total	
Column Heading 2:	Fee WIP	
Subtotal? (Y/N):	Y	
Blank When Zero? (Y/N):	N	
Formula:	C2+C3+C4+C5	

*** Report Selection Criteria ***

1) Column 6 Greater Than 0.00	

Primary Sort Column:	1	Primary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):		1	
Secondary Sort Column:	0	Secondary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):		1	
Print Subtotals Only? (Y/N):	N	Ascending or Descending Order? (A/D):	A

```
Date: 11/17/2014                          Client Notes Report                                   Page: 1
                                   V14 - Jensen, Martin & Anderson, P.C.


            Client ID  Name (First/Last)                      Work Description
               100.00  Marcus Phillips                        Real Estate Acquisition
         11/14/2014 03:57pm RON

         Met with Mr. Phillips regarding the acquisition. Confirmed receipt of letter. Mr. Phillips can only be
         reached directly in the afternoons until the end of December.

               200.01  Peterson Insurance Co.                 General Legal Counsel
         10/17/2014 02:25pm RON

         Referred by Nancy Morris.

               201.00  Greg Schnell                           Automobile Accident
         10/10/2014 04:10pm JEN

         Mr. Schell has been released from the hospital. He suffered several broken ribs, cuts, bruises and
         severe  head injuries. He had full coverage on his automobile at the time of the accident.

         The driver of the other vehicle involved in the accident was not insured at the time of the accident.

               750.00  Harrison Investments                   Purchase of Real Estate
         11/01/2014 04:06pm DHB
         I was contacted by Mr. Donald Harrison regarding the purchase of real property. Mr. Harrison was
         referred by Al Jones. Client is purchasing the property with his brother, Bradley Harrison, who
         lives in Canada. They plan to split all fees and expenses equally including the cost of the property.
         We will prepare all legal documents regarding the purchase of the property.

         All correspondence and contacts should be made with Donald Harrison directly.


         Total Client Record Count: 4
```

Client Notes Report

Report Name: NOTES.T3R

This report shows client notes for all clients who have client notes. Clients are printed in client order. When defining the Client Notes column, if you select the "Print on Report" check box, all clients will be included. However, if you clear the "Print on Report" check box, only those clients who have client notes will be included. The Client Notes column on this report is 70 characters wide and has a left margin of 5 characters. You can specify a width of 40-99 for the client notes and the report writer will reformat the client notes to the specified width for the report. The Client Notes field cannot be used for selection criteria or sorting.

Each client is separated by a line. This is done by selecting the **Print Separator** Line Between Clients check box on the **Main** tab of the report definition.

The Client Record Count is included in the report. This is done by selecting the **Print Client Count** check box on the **Main** tab of the report definition.

Report Name: NOTES.T3R   **Automatic Report Width: 80**
Description: Clients with Client Notes

Column Heading Separator (-,=,*):	-

Report Heading 1: Client Notes Report
Report Heading 2:

Print Page Numbers? (Y/N):	Y
Print Totals Only? (Y/N):	N
Double Space the Report? (Y/N):	Y
Print Commas in Amounts? (Y/N):	N
Print Client Count? (Y/N):	Y
Print Separator Line Between Clients (Y/N):	Y

Column:	01	
Field:	001	Client ID
Print on Report? (Y/N):	Y	
Field Width:	13	
Column Heading 1:		
Column Heading 2:	Client ID	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	02	
Field:	003	Full Name
Print on Report? (Y/N):	Y	
Field Width:	35	
Column Heading 1:		
Column Heading 2:	Full Name	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	03	
Field:	021	Work Description
Print on Report? (Y/N):	Y	
Field Width:	30	
Column Heading 1:		
Column Heading 2:	Work Description	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	04	
Field:	040	Client Notes
Print on Report? (Y/N):	N	
Field Width:	70	
Left Margin:	5	
Include Field Label:	N	
Indent Field Label:	N	

*** Report Selection Criteria ***
NONE

Report Name: NOTES.T3R   **Automatic Report Width: 80**
Description: Clients with Client Notes

Primary Sort Column:	1	Primary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		
Secondary Sort Column:	0	Secondary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		
Print Subtotals Only? (Y/N):	N	Ascending or Descending Order? (A/D):	A

Tabs3 New Client List
by Primary Attorney in Alphabetical Order
Burns, Jensen & Powers, P.C.

Client ID	Name (Last/First)	Work Description	Date Opened
New Clients for Prim. Atty. Daniel H. Brady			
101.00	Barrett/Karen	Apartment Management	05/02/11
750.00	Harrison Investments	Purchase of Real Estate	09/29/11
751.00	Harrison/Bradley	Purchase of Real Estate	09/20/11
402.00	Kiltzer/George	Set up trust for children	08/10/11
500.00	Lyons/Mr. & Mrs. Art	Audit of Federal Income Taxes	08/18/11
900.00	Sherman/Natalie K.	Divorce	10/04/11
850.00	White/Kelly	Divorce	10/03/11
New Clients for Prim. Atty. Julie P. Powers			
100.00	Dawson/Charles L.	Settlement of Grandfather's Estate	04/04/11
400.00	Lutz/Jody	Manage trust account for Jody	08/04/11
New Clients for Prim. Atty. Michael L. Jensen			
600.00	Ace Manufacturing Company	General Legal Counsel	09/05/11
600.01	Ace Manufacturing Company	Workers' compensation claim	09/15/11
600.02	Ace Manufacturing Company	Maintenance of insurance policies	09/16/11
350.00	Carter/Arthur J.	Protection of New Wave Patent	07/20/11
New Clients for Prim. Atty. Robert J. Burns			
800.00	ABC Insurance Company	Death Benefits	10/11/11
450.00	Able/Paul & Mary	Parent's Estate	08/15/11
550.00	Federated Casualty, Ltd.	Andrew C. Gilbert v. Federated Cas	09/01/11
700.00	First National Bank	General File	09/16/11
200.01	Jefferson Insurance Co.	Automobile Accident	06/01/11
200.02	Jefferson Insurance Co.	Hail Damage - Palmer farm	06/09/11
200.03	Jefferson Insurance Co.	Acquisition of Mid-State Insurance	07/07/11
103.00	Martin/Mary L. & Fred J.	Private Adoption	08/15/11
300.00	McBride/John	Management of Estate Trust	07/14/11
102.00	Richardson/Harold	Manage personal finances	05/11/11
941.00	Stockton/Lyle P.	Partnership Dissolution	11/17/11
940.00	Young/Stacy	Workers' Comp	11/17/11

Total Client Record Count: 25

New Client List by Primary Attorney

Report Name: SIMPLE.T3R

This report shows all new clients for each attorney. Each attorney's clients are sorted by client name. Clients are selected according to their Open Date and only if it is greater than or equal to the Report Date (i.e., RptDate). Since this report has no ending criteria for the Open Date, it will show all clients opened since the report date. This report has a primary subtotal of Primary Attorney Name; however, no columns are subtotaled. Only a heading is printed for the primary sort. The heading consists of the text "New Clients for Prim. Atty." followed by the sort identifier of the attorney name.

The Client Record Count is included on the report. This is done by selecting the "Print Client Count" check box on the **Main** tab of the report definition.

Report Name: SIMPLE.T3R   **Automatic Report Width: 86**
Description: New Client List by Attorney

Column Heading Separator (-,=,*):	-

Report Heading 1: Tabs3 New Client List
Report Heading 2: by Primary Attorney in Alphabetical Order

Print Page Numbers? (Y/N):	Y
Print Totals Only? (Y/N):	N
Double Space the Report? (Y/N):	N
Print Commas in Amounts? (Y/N):	N
Print Client Count? (Y/N):	Y
Print Separator Line Between Clients (Y/N):	N

Column:	01	
Field:	001	Client ID
Print on Report? (Y/N):	Y	
Field Width:	13	
Column Heading 1:		
Column Heading 2:	Client ID	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	02	
Field:	132	Formula
Print on Report? (Y/N):	Y	
Field Width:	1	
Column Heading 1:		
Column Heading 2:		
Subtotal? (Y/N):	N	
Blank When Zero? (Y/N):	N	
Formula:	' '	

Column:	03	
Field:	002	Name
Print on Report? (Y/N):	Y	
Field Width:	35	
Column Heading 1:		
Column Heading 2:	Name	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	04	
Field:	021	Work Description
Print on Report? (Y/N):	Y	
Field Width:	25	
Column Heading 1:		
Column Heading 2:	Work Description	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Report Name: SIMPLE.T3R   **Automatic Report Width: 86**
Description: New Client List by Attorney

Column:	05	
Field:	026	Date Opened
Print on Report? (Y/N):	Y	
Field Width:	08	
Column Heading 1:	Date	
Column Heading 2:	Opened	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	06	
Field:	036	Primary Name
Print on Report? (Y/N):	N	
Field Width:	00	
Column Heading 1:		
Column Heading 2:		
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

*** Report Selection Criteria ***

1)   Date Opened Greater Than or Equal To mm/dd/yyyy

Primary Sort Column:	6	Primary Subtotal? (Y/N):	Y
Subtotal Description:			
Heading:	New Clients for Prim. Atty.		
Page Control (0-9 Lines or P-Page Eject):	2		

Secondary Sort Column:	3	Secondary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		

Print Subtotals Only? (Y/N):	N	Ascending or Descending Order? (A/D):	A

```
Date: 11/17/2014                    Client Billing Notes Report                              Page: 1
                                    V14 - Jensen, Martin & Anderson, P.C.

        Client ID  Client Name                          Work Description
          100.00   Phillips/Marcus                      Real Estate Acquisition
        Make sure the statement is fully reviewed by Cheryl before sending to client.
          101.00   Williams/John                        State v. Williams
        11/09/2009 09:46am CHERYL - John called regarding balance. Discussed setting up a monthly
        payment schedule.
          102.00   Federated Casualty, Ltd.             Andrew C. Gilbert v. Federated Casualty
        Federated requires that we submit bills using the Litigation task code set outlined in the Uniform
        Task-Based Management System.
          300.00   McBride/John                         Management of Estate Trust
        Progress Billing Client - bill 2nd month of each quarter (Fed, May, Aug, Nov). Review activity in
        October.
```

Client Billing Notes Report

Report Name: BILLNOTE.T3R

This report shows the Billing Notes and Instructions for all clients. No criteria is restricted, so all clients that have text in the

Billing Notes and Instructions field on the **Billing Options** tab of the Client Information screen will be included.

Each client is separated by a line. This is done by selecting the **Print Separator**

Line Between Clients check box on the **Main** tab of the report definition.

Report Name: BILLNOTE.T3R   **Automatic Report Width: 102**
Description: Clients with Billing Notes

Column Heading Separator (-,=,*): -

Report Heading 1: Client Billing Notes Report
Report Heading 2:

Print Page Numbers? (Y/N):	Y
Print Totals Only? (Y/N):	N
Double Space the Report? (Y/N):	N
Print Commas in Amounts? (Y/N):	N
Print Client Count? (Y/N):	N
Print Separator Line Between Clients (Y/N):	Y

Column:	01	
Field:	001	Client ID
Print on Report? (Y/N):	Y	
Field Width:	12	
Column Heading 1:		
Column Heading 2:	Client ID	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	02	
Field:	002	Name
Print on Report? (Y/N):	Y	
Field Width:	40	
Column Heading 1:		
Column Heading 2:	Client Name	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	03	
Field:	021	Work Description
Print on Report? (Y/N):	Y	
Field Width:	48	
Column Heading 1:		
Column Heading 2:	Work Description	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	04	
Field:	045	Billing Notes and Instructions
Print on Report? (Y/N):	N	
Field Width:	70	
Left Margin:	1	
Include Field Label:	N	
Indent Field Label:	N	

*** Report Selection Criteria ***
NONE

Report Name: BILLNOTE.T3R   **Automatic Report Width: 102**
Description: Clients with Billing Notes

Primary Sort Column:	1	Primary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		
Secondary Sort Column:	0	Secondary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		
Print Subtotals Only? (Y/N):	N	Ascending or Descending Order? (A/D):	A

Comprehensive Client Notes Report
Jensen, Martin & Anderson, P.C.

Client ID	Client Name	Work Description
100.00	Phillips/Marcus	Real Estate Acquisition

Client Notes:
11/15/2014 03:57pm RON

Met with Mr. Phillips regarding the acquisition. Confirmed receipt of letter. Mr. Phillips can only be reached
directly in the afternoons until the end of December.

Billing Notes and Instructions:
Each statement must be fully reviewed by Cheryl before sending to client.

Beginning Statement Notes:
Your account is 30 days past due.

Ending Statement Notes:
Please contact Cheryl Peterson with any questions regarding your account status.

101.00	Williams/John	State v. Williams

Billing Notes and Instructions:
11/10/2014 09:46am CHERYL - John called regarding balance. Discussed setting up a monthly payment
schedule.

Beginning Statement Notes:
Docket No: 94D-07965
OJIC File No: 98698-89956

102.00	Federated Casualty, Ltd.	Andrew C. Gilbert v. Federated Casualty

Billing Notes and Instructions:
Federated requires that we submit bills using the Litigation task code set outlined in the Uniform Task-Based
Management System.

Ending Statement Notes:
Reminder: Our next meeting is scheduled for Jan. 23rd at 2:30 p.m.

200.01	Peterson Insurance Co.	General Legal Counsel

Client Notes:
10/24/2014 02:25pm RON

Referred by Nancy Morris.

201.00	Schnell/Greg	Automobile Accident

Client Notes:
10/26/2014 04:10pm JEN

Mr. Schell has been released from the hospital. He suffered several broken ribs, cuts, bruises and severe
head injuries. He had full coverage on his automobile at the time of the accident.

The driver of the other vehicle involved in the accident was not insured at the time of the accident.

300.00	McBride/John	Management of Estate Trust

Billing Notes and Instructions:
Progress Billing Client - bill 2nd month of each quarter (Fed, May, Aug, Nov). Review activity in October.

750.00	Harrison Investments	Purchase of Real Estate

Client Notes:
11/02/2014 04:06pm DHB
I was contacted by Mr. Donald Harrison regarding the purchase of real property. Mr. Harrison was referred by
Al Jones. Client is purchasing the property with his brother, Bradley Harrison, who lives in Canada. They plan
to split all fees and expenses equally including the cost of the property. We will prepare all legal documents
regarding the purchase of the property.

All correspondence and contacts should be made with Donald Harrison directly.

Comprehensive Client Notes Report

Report Name: CLNTNOTE.T3R

All client notes are included on this report, including the **Client Notes** field, **Billing Notes and Instructions**, **Beginning Statement Notes**, and **Ending Statement Notes** from the Client file.

When defining each note column, if you select the **Print on Report** check box, all clients will be included. However, if you clear the **Print on Report** check box, only the clients who have notes will be included. A field label can be printed above each note by selecting the **Include Field Label** check box.

Each client is separated by a line. This is done by selecting the **Print Separator** Line Between Clients check box on the **Main** tab of the report definition.

The notes fields cannot be used for selection criteria or sorting.

Report Name: CLNTNOTE.T3R   **Automatic Report Width: 102**
Description: Clients with Notes

Column Heading Separator (-,=,*): -

Report Heading 1: Comprehensive Client Notes Report
Report Heading 2:

Print Page Numbers? (Y/N):	Y
Print Totals Only? (Y/N):	N
Double Space the Report? (Y/N):	N
Print Commas in Amounts? (Y/N):	N
Print Client Count? (Y/N):	N
Print Separator Line Between Clients (Y/N):	Y

Column:	01	
Field:	001	Client ID
Print on Report? (Y/N):	Y	
Field Width:	12	
Column Heading 1:		
Column Heading 2:	Client ID	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	02	
Field:	002	Name
Print on Report? (Y/N):	Y	
Field Width:	40	
Column Heading 1:		
Column Heading 2:	Client Name	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	03	
Field:	021	Work Description
Print on Report? (Y/N):	Y	
Field Width:	48	
Column Heading 1:		
Column Heading 2:	Work Description	
Subtotal? (Y/N):	N	
Print on Secondary subtotal line? (Y/N):	N	

Column:	04	
Field:	040	Client Notes
Print on Report? (Y/N):	N	
Field Width:	80	
Left Margin:	5	
Include Field Label:	Y	
Indent Field Label:	N	

Report Name: CLNTNOTE.T3R   **Automatic Report Width: 102**
Description: Clients with Notes

Column:	05	
Field:	045	Billing Notes and Instructions
Print on Report? (Y/N):	N	
Field Width:	80	
Left Margin:	5	
Include Field Label:	Y	
Indent Field Label:	N	

Column:	06	
Field:	046	Beginning Statement Notes
Print on Report? (Y/N):	N	
Field Width:	80	
Left Margin:	5	
Include Field Label:	Y	
Indent Field Label:	N	

Column:	07	
Field:	047	Ending Statement Notes
Print on Report? (Y/N):	N	
Field Width:	80	
Left Margin:	5	
Include Field Label:	Y	
Indent Field Label:	N	

*** Report Selection Criteria ***
NONE

Primary Sort Column:	0	Primary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		

Secondary Sort Column:	0	Secondary Subtotal? (Y/N):	N
Subtotal Description:			
Heading:			
Page Control (0-9 Lines or P-Page Eject):	1		

Print Subtotals Only? (Y/N):	N	Ascending or Descending Order? (A/D):	A

```
┌─────────────────────────────────┐
│                                 │
│  Harold Richardson              │
│  1548 West 57th Street          │
│  Rochester  NY  14603-8409      │
│                                 │
│                                 │
└─────────────────────────────────┘

┌─────────────────────────────────┐
│  ABC Insurance Company          │
│  3232 Farnam Street             │
│  New Tower Building             │
│  5th Floor                      │
│  Omaha  NE  68102               │
└─────────────────────────────────┘

┌─────────────────────────────────┐
│  Mary L. & Fred J. Martin       │
│  4200 Goldenrod Circle          │
│  Omaha  NE  68113               │
│                                 │
│                                 │
└─────────────────────────────────┘

┌─────────────────────────────────┐
│  Arthur J. Carter               │
│  4920 Everett                   │
│  Lincoln  NE  68503             │
│                                 │
│                                 │
└─────────────────────────────────┘

┌─────────────────────────────────┐
│  Natalie K. Sherman             │
│  5334 Cherrywood Drive          │
│  Lincoln  NE  68504             │
│                                 │
│                                 │
└─────────────────────────────────┘

┌─────────────────────────────────┐
│  John McBride                   │
│  Eastmont Towers                │
│  2920 Northwest Greenbriar Lane │
│  Lincoln  NE  68505             │
│                                 │
└─────────────────────────────────┘

┌─────────────────────────────────┐
│  George Kiltzer                 │
│  3342 South 73rd Street         │
│  Lincoln  NE  68506             │
│                                 │
│                                 │
└─────────────────────────────────┘
```

1 x 3.5 Inch Mailing Labels

Form Name: LBL1X3_5.T3L

The 1 by 3 inch mailing label form has 6 lines per form (5 of which are defined to print) and a form width of 39. Since the form width is only 39 characters, the client name line has been defined so that it will be truncated if it exceeds the report width. Blank lines are omitted (due to blank address lines) and only one label for each client is printed. The labels are printed in ascending order by zip code. The Client ID was selected as a secondary sort field to ensure that only one label per client would be printed. No selection criteria is specified.

Form Name: LBL1X3_5.T3L 1 x 3.5 mailing labels

Form Width:	039
Number of Lines/Form:	006
Number of Forms/Page:	001
Omit Blank Lines? (Y/N):	Y
Print Commas in Amounts? (Y/N):	N

Field:	003	Full Name
Line Number:	1	
Tab Position:	1	
Column Width:	39	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	005	Address Line 1
Line Number:	2	
Tab Position:	1	
Column Width:	35	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	006	Address Line 2
Line Number:	3	
Tab Position:	1	
Column Width:	35	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	007	Address Line 3
Line Number:	4	
Tab Position:	1	
Column Width:	35	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	012	City/State/Zip
Line Number:	5	
Tab Position:	1	
Column Width:	36	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

*** Form Selection Criteria ***
NONE

Primary Sort Field:	010	Zip
Secondary Sort Field:	001	Client ID
Ascending or Descending Order? (A/D):	A	

```
          100.00   DAWSON/CHARLES L        JPP
Charles L. Dawson
Settlement of Grandfather's Estate
Contact:   *Chuck Dawson
27550 Cottonwood Drive
San Bernadino  CA  92408
Ph #: 714-884-7525        Opened: 06/20/11
```

```
          101.00   BARRETT/KAREN           DHB
Karen Barrett
Apartment Management
Contact:   *Karen Barrett
3010 South 14th Street
Lincoln  NE  68510
Ph #: 402-466-1234        Opened: 11/21/11
```

```
          102.00  RICHARDSON/HAROL         RJB
Harold Richardson
Manage personal finances
Contact:  *Harold Richardson
1548 West 57th Street
Rochester  NY  14603-8409
Ph #: 716-253-4510        Opened: 11/09/11
```

```
          103.00  MARTIN/MARY L. &         RJB
Mary L. & Fred J. Martin
Private Adoption
Contact:  *Mary Martin
4200 Goldenrod Circle
Omaha  NE  68113
Ph #: 402-731-8877        Opened: 01/13/11
```

1.5 x 4 Inch File Folder Labels

Form Name: LBL1_5X4.T3L

The 1 by 4 inch label form has 9 lines per form (8 of which are defined to print) and a form width of 40. The Client Name and Work Description fields will be truncated.

Blank lines (due to blank address lines) are omitted and a label will print for each client file. No selection criteria is specified. The labels are printed by client ID in ascending order.

Form Name: lbl1_5x4.t3l 1.5 x 4 file folder labels

Form Width:		080
Number of Lines/Form:		009
Number of Forms/Page:		001
Omit Blank Lines? (Y/N):		Y
Print Commas in Amounts? (Y/N):		N

Field:	001	Client ID
Line Number:	001	
Field Width:	13	
Tab Position:	001	
Wrap Text? (Y/N):	N	

Field:	004	Name Search
Line Number:	001	
Field Width:	16	
Tab Position:	016	
Wrap Text? (Y/N):	N	

Field:	032	Primary Initials
Line Number:	001	
Field Width:	3	
Tab Position:	038	
Wrap Text? (Y/N):	N	

Field:	003	Name
Line Number:	002	
Field Width:	40	
Tab Position:	001	
Wrap Text? (Y/N):	N	

Field:	021	Work Description
Line Number:	003	
Field Width:	40	
Tab Position:	001	
Wrap Text? (Y/N):	N	

Text:	Contact:	
Line Number:	004	
Field Width:	8	
Tab Position:	001	

Field:	013	Contact Full Name
Line Number:	004	
Field Width:	25	
Tab Position:	011	
Wrap Text? (Y/N):	N	

Field:	005	Address Line 1
Line Number:	005	
Field Width:	35	
Tab Position:	001	
Wrap Text? (Y/N):	N	

Form Name: lbl1_5x4.t3l 1.5 x 4 file folder labels

Field:	006	Address Line 2
Line Number:	006	
Field Width:	35	
Tab Position:	001	
Wrap Text? (Y/N):	N	

Field:	012	City/State/Zip
Line Number:	007	
Field Width:	36	
Tab Position:	001	
Wrap Text? (Y/N):	N	

Text:	Ph #:	
Line Number:	008	
Field Width:	5	
Tab Position:	001	

Field:	014	Phone 1
Line Number:	008	
Field Width:	12	
Tab Position:	007	
Wrap Text? (Y/N):	N	

Text:	Opened:	
Line Number:	008	
Field Width:	7	
Tab Position:	025	

Field:	025	Date Opened
Line Number:	008	
Field Width:	8	
Tab Position:	033	

*** Form Selection Criteria ***
NONE

Primary Sort Field:	001	Client ID
Secondary Sort Field:	000	
Ascending or Descending Order? (A/D):	A	

```
ABC INSURANCE CO    Client ID:        800.00
402-333-2875        Harold Lindsay

ABC Insurance Company

3232 Farnam Street
New Tower Building
5th Floor
Omaha   NE   68102
```

```
ACE MANUFACTURIN    Client ID:        600.00
402-435-1739        Al Jones

Ace Manufacturing Company

5th & Turner
Malcolm   NE   68633
```

```
BARRETT/KAREN       Client ID:        101.00
402-466-1234        Karen Barrett

Karen Barrett

3010 South 14th Street
Lincoln   NE   68510
```

2 x 4 Inch Rotary Index Cards

Form Name: R2X4.T3L

The 2x4 inch rotary index card has 13 lines per form (10 of which are defined to print) and a form width of 42. *(Note: The rotary index card is actually two and one sixth inches long.)* The Contact Full Name field is truncated. The Client Name field will be wrapped if it exceeds the form width. Blank lines are omitted. Only one card will print for clients with multiple files.

No selection criteria is specified. The cards will print alphabetically in ascending order (i.e., by the Name Search field).

Form Name: R2X4.T3L Rotary index cards 2x4 inches

Form Width:	080
Number of Lines/Form:	013
Number of Forms/Page:	004
Omit Blank Lines? (Y/N):	Y
Print Commas in Amounts? (Y/N):	N

Field:	004	Name Search
Line Number:	1	
Tab Position:	1	
Column Width:	16	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Text:	Client ID
Line Number:	1
Tab Position:	20
Column Width:	12
Text:	Client ID

Field:	001	Client ID
Line Number:	1	
Tab Position:	30	
Column Width:	13	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	014	Phone 1
Line Number:	2	
Tab Position:	1	
Column Width:	31	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	013	Contact Full Name
Line Number:	2	
Tab Position:	33	
Column Width:	23	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	003	Full Name
Line Number:	4	
Tab Position:	1	
Column Width:	50	
Wrap Text? (Y/N):	Y	
Wrap Indent:	5	

Field:	005	Address Line 1
Line Number:	6	
Tab Position:	1	
Column Width:	35	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Form Name: R2X4.T3L Rotary index cards 2x4 inches

Field:	006	Address Line 2
Line Number:	7	
Tab Position:	1	
Column Width:	35	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	007	Address Line 3
Line Number:	8	
Tab Position:	1	
Column Width:	35	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	012	City/State/Zip
Line Number:	9	
Tab Position:	1	
Column Width:	36	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	011	Country
Line Number:	10	
Tab Position:	1	
Column Width:	20	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

*** Form Selection Criteria ***
NONE

Primary Sort Field:	004	Name Search
Secondary Sort Field:	000	
Ascending or Descending Order? (A/D):	A	

```
ABC INSURANCE CO    Client ID:        800.00
402-333-2875         Harold Lindsay

ABC Insurance Company
3232 Farnam Street
New Tower Building
5th Floor
Omaha  NE  68102

Death Benefits
Insured: Harvey Smith
Soc. Sec. No: 331-35-8964
Policy No: 2003D-99-682
Open: 07/25/11  P: S:3        2  O:   2  Cat:  15
```

```
WHITE/KELLY          Client ID:        850.00
402-474-4336         *Kelly White

Kelly White
201 South 47th
Apt. 4
Lincoln  NE  68507

Divorce
White vs. White
*Uncontested
Open: 05/05/11  P: S:4        1  O:   1  Cat:  35
```

3 x 5 Inch Rotary Index Cards

Form Name: R3X5.T3L

The 3x5 inch rotary index card has 18 lines per form (15 of which are defined to print) and a form width of 54. Blank lines are omitted. Only one card will print for clients with multiple files.

No form selection criteria is specified. The cards will print in ascending order by Client ID.

Form Name: R3X5.T3L Rotary index cards 3x5 inches

Form Width:	080
Number of Lines/Form:	018
Number of Forms/Page:	001
Omit Blank Lines? (Y/N):	Y
Print Commas in Amounts? (Y/N):	N

Field:	004	Name Search
Line Number:	1	
Tab Position:	1	
Column Width:	16	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Text:	Client ID
Line Number:	1
Tab Position:	20
Column Width:	35
Text:	Client ID

Field:	001	Client ID
Line Number:	1	
Tab Position:	30	
Column Width:	13	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	014	Phone 1
Line Number:	2	
Tab Position:	1	
Column Width:	31	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	013	Contact Full Name
Line Number:	2	
Tab Position:	33	
Column Width:	25	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	003	Full Name
Line Number:	4	
Tab Position:	1	
Column Width:	50	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	005	Address Line 1
Line Number:	5	
Tab Position:	1	
Column Width:	35	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Form Name: R3X5.T3L Rotary index cards 3x5 inches

Field:	006	Address Line 2
Line Number:	6	
Tab Position:	1	
Column Width:	35	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	007	Address Line 3
Line Number:	7	
Tab Position:	1	
Column Width:	35	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	012	City/State/Zip
Line Number:	8	
Tab Position:	1	
Column Width:	36	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	011	Country
Line Number:	9	
Tab Position:	1	
Column Width:	20	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	021	Work Description
Line Number:	11	
Tab Position:	1	
Column Width:	50	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	022	Misc. Line #1
Line Number:	12	
Tab Position:	1	
Column Width:	35	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	023	Misc. Line #2
Line Number:	13	
Tab Position:	1	
Column Width:	35	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Field:	024	Misc. Line #3
Line Number:	14	
Tab Position:	1	
Column Width:	35	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Form Name: R3X5.T3L Rotary index cards 3x5 inches

Text:	Open:
Line Number:	15
Tab Position:	1
Column Width:	5
Text:	Open:

Field:	026	Date Opened
Line Number:	15	
Tab Position:	7	
Column Width:	8	

Text:	P:
Line Number:	15
Tab Position:	17
Column Width:	2
Text:	P:

Field:	029	Primary
Line Number:	15	
Tab Position:	20	
Column Width:	3	

Text:	S:
Line Number:	15
Tab Position:	25
Column Width:	2
Text:	S:

Field:	030	Sec.
Line Number:	15	
Tab Position:	28	
Column Width:	3	

Text:	O:
Line Number:	15
Tab Position:	33
Column Width:	2
Text:	O:

Field:	031	Orig.
Line Number:	15	
Tab Position:	36	
Column Width:	3	

Text:	Cat:
Line Number:	15
Tab Position:	41
Column Width:	4
Text:	Cat:

Field:	032	Category
Line Number:	15	
Tab Position:	46	
Column Width:	3	

*** Form Selection Criteria ***
NONE

Form Name: R3X5.T3L Rotary index cards 3x5 inches

Primary Sort Field:	001	Client ID
Secondary Sort Field:	000	
Ascending or Descending Order? (A/D):	A	

```
                    Tabs3 Client Information Summary

            200.02    Peterson Insurance Co.
Case:           Maintenance of Insurance Policies

Address:    5th & Turner

            Malcolm  NE  68633

Paul Franklin

Phone:      402-435-1739x512
Fax:
Cell:       402-474-8605
E-mail:     pfranklin@petersoninsurance.com

Misc:


Open:    08/22/2014       Close:      mm/dd/yyyy

Prim Atty:      3        Ronald P. Anderson
Sec Atty:       2        Paula Ann Martin
Orig Atty:      2        Paula Ann Martin

Category:       60       General Litigation

Location:       Omaha Office

Inactive?    N    Secure?       N
Progress?    N    Taskbill?     N

Custom Information:
Invoice_Desc: Interim
Client_Matter_No: 200_02
Tymetrix_Client_ID: Peterson Insurance
```

Client File

Form Name: CLNTFILE.T3L

The Client File form is designed to be a one-page summary of client information, suitable for a paper file or cover sheet. This form includes most basic client information, including Client ID, client name, work description, the client address and phone numbers, the miscellaneous information fields, open and close dates, timekeeper assignments, category information, whether the client is inactive, secure, progress billed or a task based billing client, and the first 10 custom fields.

Form Name: CLNTFILE.T3L Client File Information

Form Width:	080
Number of Lines/Form:	180
Number of Forms/Page:	001
Omit Blank Lines? (Y/N):	N
Print Commas in Amounts? (Y/N):	N
Text:	Tabs3 Client Information Summary
Line Number:	1
Tab Position:	24
Column Width:	32
Text:	Tabs3 Client Information Summary
Field:	001 Client ID
Line Number:	3
Tab Position:	1
Column Width:	12
Wrap Text? (Y/N):	N
Wrap Indent:	0
Field:	002 Name
Line Number:	3
Tab Position:	15
Column Width:	50
Wrap Text? (Y/N):	N
Wrap Indent:	0
Text:	Case:
Line Number:	4
Tab Position:	1
Column Width:	10
Text:	Case:
Field:	021 Work Description
Line Number:	4
Tab Position:	10
Column Width:	50
Wrap Text? (Y/N):	N
Wrap Indent:	0
Text:	Address:
Line Number:	6
Tab Position:	1
Column Width:	10
Text:	Address:
Field:	005 Address Line 1
Line Number:	6
Tab Position:	10
Column Width:	35
Wrap Text? (Y/N):	N
Wrap Indent:	0

Form Name: CLNTFILE.T3L Client File Information

Field:	006 Address Line 2
Line Number:	7
Tab Position:	10
Column Width:	35
Wrap Text? (Y/N):	N
Wrap Indent:	0
Field:	012 City/State/Zip
Line Number:	8
Tab Position:	10
Column Width:	37
Wrap Text? (Y/N):	N
Wrap Indent:	0
Field:	013 Contact Full Name
Line Number:	10
Tab Position:	1
Column Width:	25
Wrap Text? (Y/N):	N
Wrap Indent:	0
Text:	Phone:
Line Number:	12
Tab Position:	1
Column Width:	10
Text:	Phone:
Field:	014 Phone 1
Line Number:	12
Tab Position:	10
Column Width:	31
Wrap Text? (Y/N):	N
Wrap Indent:	0
Text:	Fax:
Line Number:	13
Tab Position:	1
Column Width:	10
Text:	Fax:
Field:	016 Phone 2
Line Number:	13
Tab Position:	10
Column Width:	31
Wrap Text? (Y/N):	N
Wrap Indent:	0
Text:	Cell:
Line Number:	14
Tab Position:	1
Column Width:	10
Text:	Cell:

Form Name: CLNTFILE.T3L Client File Information

Field:	019 Phone 4
Line Number:	14
Tab Position:	10
Column Width:	31
Wrap Text? (Y/N):	N
Wrap Indent:	0
Text:	E-mail:
Line Number:	15
Tab Position:	1
Column Width:	10
Text:	E-mail:
Field:	020 E-mail Address
Line Number:	15
Tab Position:	10
Column Width:	70
Wrap Text? (Y/N):	N
Wrap Indent:	0
Text:	Misc:
Line Number:	17
Tab Position:	1
Column Width:	5
Text:	Misc:
Field:	022 Misc. Line #1
Line Number:	17
Tab Position:	8
Column Width:	50
Wrap Text? (Y/N):	N
Wrap Indent:	0
Field:	023 Misc. Line #2
Line Number:	18
Tab Position:	8
Column Width:	50
Wrap Text? (Y/N):	N
Wrap Indent:	0
Field:	024 Misc. Line #3
Line Number:	19
Tab Position:	8
Column Width:	50
Wrap Text? (Y/N):	N
Wrap Indent:	0
Text:	Open:
Line Number:	21
Tab Position:	1
Column Width:	6
Text:	Open:

Form Name: CLNTFILE.T3L Client File Information

Field:	026 Date Opened
Line Number:	21
Tab Position:	8
Column Width:	10
Text:	Close:
Line Number:	21
Tab Position:	21
Column Width:	6
Text:	Close:
Field:	027 Close Date
Line Number:	21
Tab Position:	30
Column Width:	10
Text:	Prim Atty:
Line Number:	23
Tab Position:	1
Column Width:	10
Text:	Prim Atty:
Field:	029 Primary
Line Number:	23
Tab Position:	12
Column Width:	3
Field:	036 Primary Name
Line Number:	23
Tab Position:	20
Column Width:	35
Wrap Text? (Y/N):	N
Wrap Indent:	0
Text:	Sec Atty:
Line Number:	24
Tab Position:	1
Column Width:	10
Text:	Sec Atty:
Field:	030 Sec.
Line Number:	24
Tab Position:	12
Column Width:	3
Field:	037 Sec. Name
Line Number:	24
Tab Position:	20
Column Width:	35
Wrap Text? (Y/N):	N
Wrap Indent:	0
Text:	Orig Atty:
Line Number:	25
Tab Position:	1
Column Width:	10
Text:	Orig Atty:

Form Name: CLNTFILE.T3L Client File Information

Field:	031	Orig.
Line Number:	25	
Tab Position:	12	
Column Width:	3	
Field:	038	Orig. Name
Line Number:	25	
Tab Position:	20	
Column Width:	35	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	
Text:	Category:	
Line Number:	27	
Tab Position:	1	
Column Width:	10	
Text:	Category:	
Field:	032	Category
Line Number:	27	
Tab Position:	12	
Column Width:	3	
Field:	039	Category Desc.
Line Number:	27	
Tab Position:	20	
Column Width:	30	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	
Text:	Location:	
Line Number:	29	
Tab Position:	1	
Column Width:	10	
Text:	Location:	
Field:	042	Location Description
Line Number:	29	
Tab Position:	12	
Column Width:	40	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	
Text:	Inactive?	
Line Number:	31	
Tab Position:	1	
Column Width:	10	
Text:	Inactive?	
Field:	050	Inactive
Line Number:	31	
Tab Position:	12	
Column Width:	1	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	

Form Name: CLNTFILE.T3L Client File Information

Text:	Secure?	
Line Number:	31	
Tab Position:	15	
Column Width:	10	
Text:	Secure?	
Field:	051	Secure Client
Line Number:	31	
Tab Position:	25	
Column Width:	1	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	
Text:	Progress?	
Line Number:	32	
Tab Position:	1	
Column Width:	10	
Text:	Progress?	
Field:	052	Progress Billing
Line Number:	32	
Tab Position:	12	
Column Width:	1	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	
Text:	Taskbill?	
Line Number:	32	
Tab Position:	15	
Column Width:	10	
Text:	Taskbill?	
Field:	055	Task Based Billing
Line Number:	32	
Tab Position:	25	
Column Width:	1	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	
Text:	Custom Information:	
Line Number:	34	
Tab Position:	1	
Column Width:	20	
Text:	Custom Information:	
Field:	025	Custom Field
Line Number:	35	
Tab Position:	1	
Column Width:	50	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	
Custom Field Number:	1	
Print Custom Field:	Label and Text	

Form Name: CLNTFILE.T3L Client File Information

Field:	025	Custom Field
Line Number:	36	
Tab Position:	1	
Column Width:	50	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	
Custom Field Number:	2	
Print Custom Field:	Label and Text	
Field:	025	Custom Field
Line Number:	37	
Tab Position:	1	
Column Width:	50	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	
Custom Field Number:	3	
Print Custom Field:	Label and Text	
Field:	025	Custom Field
Line Number:	38	
Tab Position:	1	
Column Width:	50	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	
Custom Field Number:	4	
Print Custom Field:	Label and Text	
Field:	025	Custom Field
Line Number:	39	
Tab Position:	1	
Column Width:	50	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	
Custom Field Number:	5	
Print Custom Field:	Label and Text	
Field:	025	Custom Field
Line Number:	40	
Tab Position:	1	
Column Width:	50	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	
Custom Field Number:	6	
Print Custom Field:	Label and Text	
Field:	025	Custom Field
Line Number:	41	
Tab Position:	1	
Column Width:	50	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	
Custom Field Number:	7	
Print Custom Field:	Label and Text	

Form Name: CLNTFILE.T3L Client File Information

Field:	025	Custom Field
Line Number:	42	
Tab Position:	1	
Column Width:	50	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	
Custom Field Number:	8	
Print Custom Field:	Label and Text	
Field:	025	Custom Field
Line Number:	43	
Tab Position:	1	
Column Width:	50	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	
Custom Field Number:	9	
Print Custom Field:	Label and Text	
Field:	025	Custom Field
Line Number:	44	
Tab Position:	1	
Column Width:	50	
Wrap Text? (Y/N):	N	
Wrap Indent:	0	
Custom Field Number:	10	
Print Custom Field:	Label and Text	

*** Form Selection Criteria ***
NONE

Primary Sort Field:	001	Client ID
Secondary Sort Field:	000	
Ascending or Descending Order? (A/D):	A	

```
Client ID:        200.01
Client Name:    Peterson Insurance Co.
Work Desc:      Maintenance of Insurance Policies

       Custom Fields Label              Text
       -------------------------------------    ----------------------------------------
       Invoice_Description              Final
       Client_Matter_ID                 200_01
       TyMetrix_Client_ID               98-345-pic


-----------------------------------------------------------------------------------------------------------------

Client ID:        48963.00
Client Name:    Ace Manufacturing Company
Work Desc:      Workers' Compensation Claim

       Custom Fields Label              Text
       -------------------------------------    ----------------------------------------
       Claim_Number                     hg-909-6578
       Claim_Representative             Claude Garrison
       Invoice_Sequence                 INITIAL
       Matter_ID_Number                 N/A


-----------------------------------------------------------------------------------------------------------------

Client ID:        60102.00
Client Name:    Federated Casualty, Ltd.
Work Desc:      Andrew C. Gilbert vs. Federated Casualty

       Custom Fields Label              Text
       -------------------------------------    ----------------------------------------
       Claim_Number                     890-09-fed-98645
       Claims_Handler                   Johnson/Sherry
       Date_of_Loss                     31Jul11


-----------------------------------------------------------------------------------------------------------------
```

Client Custom Fields for Task Based Billing

Report Name: CUSTOM_F.TLR

Tabs3 allows up to 50 custom fields to be defined for each client. Custom fields can be used to store information that is not already tracked in Tabs3. Most commonly custom fields are used for Task Based Billing clients to hold information regarding electronic billing. This report shows all custom fields for task based billing clients. Only clients with the **Task Based Billing Client** check box selected on the **Setup** tab in the Client file will be included.

Form Name: CUSTOM_F.T3L Client Custom Fields for Task Based Billing

Form Width:	090
Number of Lines/Form:	001
Number of Forms/Page:	256
Omit Blank Lines? (Y/N):	Y
Print Commas in Amounts? (Y/N):	N
Text:	Client ID:
Line Number:	2
Tab Position:	1
Column Width:	25
Text:	Client ID:
Field:	001 Client ID
Line Number:	2
Tab Position:	10
Column Width:	12
Wrap Text? (Y/N):	N
Wrap Indent:	0
Text:	Client Name:
Line Number:	3
Tab Position:	1
Column Width:	35
Text:	Client Name:
Field:	003 Full Name
Line Number:	3
Tab Position:	12
Column Width:	50
Wrap Text? (Y/N):	N
Wrap Indent:	0
Text:	Work Desc:
Line Number:	4
Tab Position:	1
Column Width:	35
Text:	Work Desc:
Field:	021 Work Description
Line Number:	4
Tab Position:	12
Column Width:	50
Wrap Text? (Y/N):	N
Wrap Indent:	0
Text:	Custom Fields Label
Line Number:	6
Tab Position:	5
Column Width:	20
Text:	Custom Fields Label
Text:	Text
Line Number:	6
Tab Position:	28
Column Width:	35
Text:	Text

Form Name: CUSTOM_F.T3L Client Custom Fields for Task Based Billing

Text:	--
Line Number:	7
Tab Position:	5
Column Width:	20
Text:	--
Text:	--------------------------------
Line Number:	7
Tab Position:	28
Column Width:	35
Text:	--------------------------------
Field:	025 Custom Field
Line Number:	8
Tab Position:	5
Column Width:	20
Wrap Text? (Y/N):	N
Wrap Indent:	0
Custom Field Number:	1
Print Custom Field:	Label
Field:	025 Custom Field
Line Number:	8
Tab Position:	28
Column Width:	50
Wrap Text? (Y/N):	N
Wrap Indent:	0
Custom Field Number:	1
Print Custom Field:	Text
Field:	025 Custom Field
Line Number:	9
Tab Position:	5
Column Width:	20
Wrap Text? (Y/N):	N
Wrap Indent:	0
Custom Field Number:	2
Print Custom Field:	Label
Field:	025 Custom Field
Line Number:	9
Tab Position:	28
Column Width:	50
Wrap Text? (Y/N):	N
Wrap Indent:	0
Custom Field Number:	2
Print Custom Field:	Text

Form Name: CUSTOM_F.T3L Client Custom Fields for Task Based Billing

Field:	025 Custom Field
Line Number:	10
Tab Position:	5
Column Width:	20
Wrap Text? (Y/N):	N
Wrap Indent:	0
Custom Field Number:	3
Print Custom Field:	Label
Field:	025 Custom Field
Line Number:	10
Tab Position:	28
Column Width:	50
Wrap Text? (Y/N):	N
Wrap Indent:	0
Custom Field Number:	3
Print Custom Field:	Text
Field:	025 Custom Field
Line Number:	11
Tab Position:	5
Column Width:	20
Wrap Text? (Y/N):	N
Wrap Indent:	0
Custom Field Number:	4
Print Custom Field:	Label
Field:	025 Custom Field
Line Number:	11
Tab Position:	28
Column Width:	50
Wrap Text? (Y/N):	N
Wrap Indent:	0
Custom Field Number:	4
Print Custom Field:	Text
Field:	025 Custom Field
Line Number:	12
Tab Position:	5
Column Width:	20
Wrap Text? (Y/N):	N
Wrap Indent:	0
Custom Field Number:	5
Print Custom Field:	Label
Field:	025 Custom Field
Line Number:	12
Tab Position:	28
Column Width:	50
Wrap Text? (Y/N):	N
Wrap Indent:	0
Custom Field Number:	5
Print Custom Field:	Text

Form Name: CUSTOM_F.T3L Client Custom Fields for Task Based Billing

Text:	
Line Number:	60
Tab Position:	1
Column Width:	90
Text:	

*** Form Selection Criteria ***

1)	Task Based Billing Equal To Y	
Primary Sort Field:		000
Secondary Sort Field:		000
Ascending or Descending Order? (A/D):		A

(Note: This form definition actually consists of 19 pages. Only pages 1, 2, 3, and 19 are shown here.)

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