Reliable Software. Trusted Service.

Clients and Contacts Guide

Tabs3 Billing

PracticeMaster

General Ledger

Accounts Payable

Trust Accounting

Tabs3 Billing & PracticeMaster Clients & Contacts Guide

Software Technology, LLC
1621 Cushman Drive
Lincoln, NE 68512
(402) 423-1440
Tabs3.com

Version 19 (Monday, April 29, 2019)

Table of Contents

Purpose of Guide **1**

Key Concepts 1

What is a client? 1

What is a contact? 1

Clients **2**

Clients and Matters 2

Secure Clients 3

Base Matters 3

Clients in Tabs3 Billing 4

Address tab in the Tabs3 Billing Client File 4

Matter Contact 5

Setup tab in the Tabs3 Client File 6

Other Tabs in the Tabs3 Billing Client File 7

Training Videos 7

Clients in PracticeMaster 8

List tab in PracticeMaster 8

Address tab in the PracticeMaster Client File 9

Setup tab in PracticeMaster 9

Details tab in the PracticeMaster Client File 10

Court tab in the PracticeMaster Client File 10

Other Tabs in the PracticeMaster Client File 11

Training Videos 11

Clients in Trust Accounting Software 11

Contacts **12**

Contact Fields in the PracticeMaster Contact File 16

Contact Tab 16

Misc Tab 17

Other Tabs in the PracticeMaster Contact File 17

Converting Contacts into Clients 17

Training Videos 17

Contact Usage 17

Contact Usage Tab 18
Contact Usage Reports 19
Training Videos 20
Contact Utilities 21
Rename Contact 21
Contact Categories 21
Merge Contacts 22
Client Utilities 23
Renumber Client 23
Change Client Options 23
Reports 24
Client and Contact Lists 24
Training Videos 26

Resources 27
Help 27
Training Videos 27
Knowledge Base 27
Guides 27

Index 28

Purpose of Guide

The purpose of this Guide is to familiarize you with Clients and Contacts and how they work together in Tabs3 Billing and PracticeMaster.

Key Concepts

While contacts and clients are closely related, they are not the same. The contacts in the Contact file consist of a list of individuals and businesses. It is possible that a contact will never be a client. Clients, meanwhile, are contacts who have contracted the firm to perform services on their behalf.

What is a client?

Clients are the backbone of any law firm. Firms earn money by rendering services to clients and being paid for those services. A firm may represent individuals, businesses, or a combination of both in one or more *matters*, or specific cases. Tabs3 Billing and PracticeMaster are versatile programs that help you keep track of your client information, from billing and statement generation to calendar entries, journal records, and more!

What is a contact?

Not every person that interacts with a law firm is a client of that firm. From medical professionals to your County Clerk, law firms deal with many contacts. A contact is anyone that the law firm works with and retains contact information for. Recording this information in Tabs3 Billing and PracticeMaster makes it easy for users to find phone numbers, addresses, email addresses, and more, without having to search for a physical file. Contact information also synchronizes to Outlook, which can then be synchronized to a smartphone or other device.

Client records are linked to contact records. This means that changes to a client's name, address, phone number, and email address information are done via the Contact file rather than the Client file. Editing the Contact file saves time when updating information for multiple client matters. Updating a Contact file updates linked Client records; therefore, a contact linked to twenty different matters must only be updated once for the change to take effect across all twenty client matters.

Contacts can easily be converted to clients. This allows you to enter prospective clients and convert them to client records when the time is right to do so.

Clients

Clients and Matters

While you can enter clients in both Tabs3 Billing and PracticeMaster using the **Client** program, users will typically work from within one program or the other. You can create a new contact record during the client creation process. This makes it easy to enter both clients and contacts "on the fly". The client entry process is similar in both Tabs3 Billing and PracticeMaster.

Tabs3 Billing and PracticeMaster identify clients and their matters through the use of *Client IDs*. All Client IDs can have a maximum of 12 characters including an optional decimal point. Typically, the portion of the Client ID to the left of the decimal represents the client and the portion of the Client ID to the right of the decimal represents an individual matter for the client. The client is the person requesting services, while the matter refers to the specific services being obtained. Clients can have one matter or many different matters.

Client ID	Client Name	Work Description	Phone	Email Address
850.00	White/Kelly	Divorce	213-474-4336	kelly_white_la@hushmail.com
850.01	White/Kelly	Last Will & Testament	213-474-4336	kelly@homeoffice.net
850.02	White/Kelly	Medical Care of Brianne	213-474-4336	kelly@homeoffice.net

Figure 1, Single client with multiple matters

Clients IDs can differ based on the firm's Key Type. There are three Key Types to choose from: Numeric, Alpha, and Mixed. Each will affect the way Client IDs are created in Tabs3 Billing and PracticeMaster. If you are unsure of which Key Type to use, we recommend using Numeric.

More Info: For more information on Key Types, see the Key Types section of the Help or the ***Administrator Guide***.

▸ To add a new client or matter in Tabs3 and PracticeMaster

1. From the **File** menu, select **Open**, and then click **Client**.
2. Click the icon on the toolbar.
3. The New Client Record window will displayed. Select the **Next Available Client ID**, **Specific Client ID**, or **Specific Matter ID** button and enter a unique, unused Client ID.
4. Click **OK**.
5. Enter the **Client Name** in Last/First format and press the Enter key. If the Contact already exists, proceed to step 8. Otherwise, proceed to step 6.
6. In the Contact Information window, enter the contact information for the client.

7. Click to save the new contact and return to the Client Information window.
8. Enter the remaining client information and click to save the new client record.

Additional information for each matter is entered on the various tabs of the Client file. The specific fields and tabs vary depending on whether you are using Tabs3 Billing or PracticeMaster.

Secure Clients

The Secure Clients feature allows you to limit access of sensitive client information to specific users. Marking a client secure prevents client information from appearing on reports or during statement generation unless the user running the program has rights to access the secure client.

▸ To mark a client secure

1. Check the **Secure Client** check box for the client you want to make secure.
2. Click the **Users** button.
3. Select each user you want to grant rights to the secure client.
4. Click **OK**.
5. Click to save the client record.

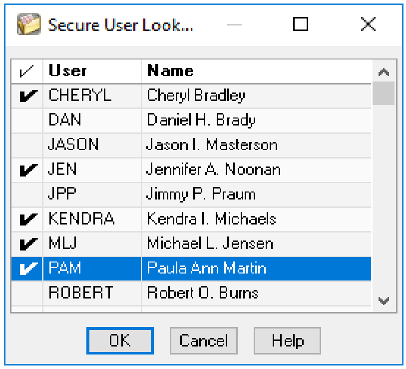

Figure 2, Select Secure Users window

Note: Manager users automatically have *all* rights to *all* client information, including secure clients.

Base Matters

The first matter number for a client ID is known as the *base matter*. When making changes to the base matter, you can optionally update all other matters with the new information at the same time. Upon saving changes to the base matter, the following message is displayed:

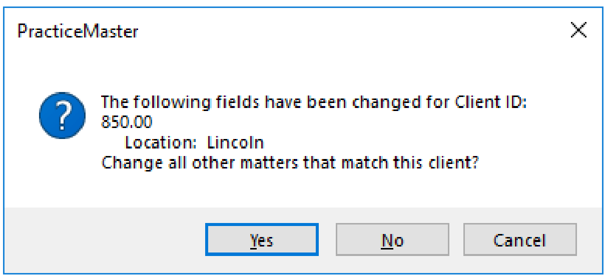

Figure 3, Base Matter Change dialog box

Clients in Tabs3 Billing

Menu: ***File* | *Open* | *Client***
Home: ***All Actions* | *People* | *Client Information***

The Client File in Tabs3 Billing focuses on billing and statement information. Many of the fields in the Client file are self-explanatory. You can use the Tabs3 Billing Help to see detailed information on any field. The following highlights a few of the more important fields within Tabs3 Billing.

Address tab in the Tabs3 Billing Client File

The **Address** tab contains name and address information for both the client and the person being corresponded with regarding the case, known as the *matter contact*. Typically, when working on an individual's case, the client and matter contact are the same, whereas organizations will designate a single representative to work with the firm. In the following example, the client is MegaConstruction Corporation, whereas the matter contact is James R. Tatiki, Sr.

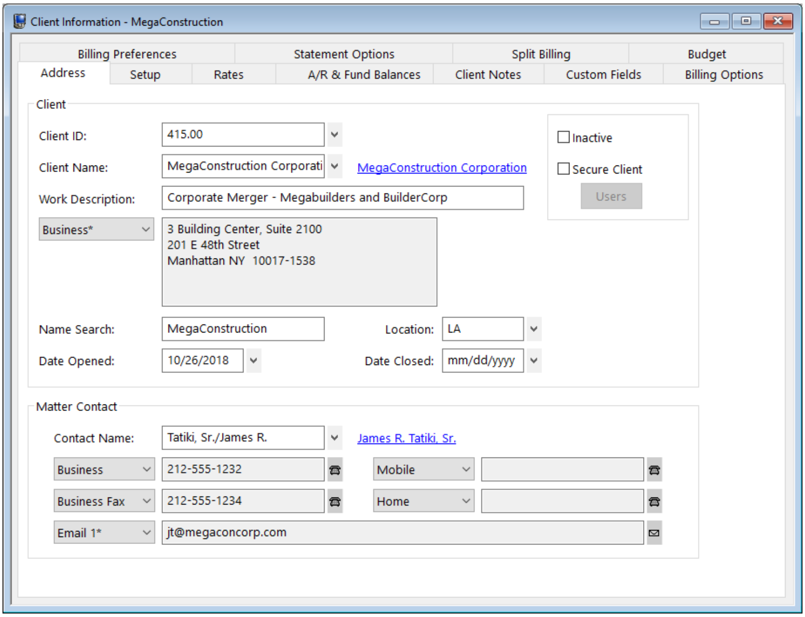

*Figure 4, Tabs3 Client File **Address** tab*

Client ID — The **Client ID** is a unique identifier used to reference the client.

Client Name

Tabs3 Billing and PracticeMaster link contact information to client records. The client contact is linked via the **Client Name** field, with a link to the Contact Information appearing to the right of the Client Name field.

Inactive

The **Inactive** check box is used to identify client matters that are closed or no longer being actively worked on.

Work Description

The **Work Description** field serves as an explanation of the case. The **Work Description** can optionally appear on a client's billing statement.

Address

The **Address** section consists of a selector and an address block. The address that appears in the address block differs depending on which selector option is currently selected.

When **Home**, **Business**, or **Other** is selected, the address block will display the address from the linked client contact as read-only. If the currently selected client is marked as a secure client, the address block can be edited via the Client window by those users who have rights to the secure client. The selector will be labeled **Secure** and cannot be changed.

Selecting **Matter** for the selector allows you to edit the address block via the Client file. This option is typically used for unique address requirements without creating additional contact records.

Name Search

The **Name Search** field is used to access client records by name using an Alpha Search instead of by Client ID.

Matter Contact

The matter contact *(Figure 5)* represents the person to contact on behalf of the client. In most cases the matter contact is the same person as the client when the client is an individual, but is typically different than the client when the client is an organization.

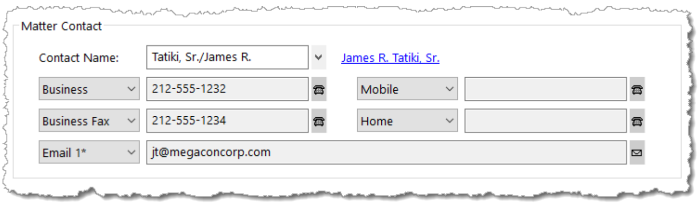

Figure 5, Tabs3 Client File Matter Contact section

The matter contact determines the available phone numbers and email addresses for the client record.

Setup tab in the Tabs3 Client File

The **Setup** tab contains information regarding the client's billing category, report order timekeepers, billing status, and payment settings.

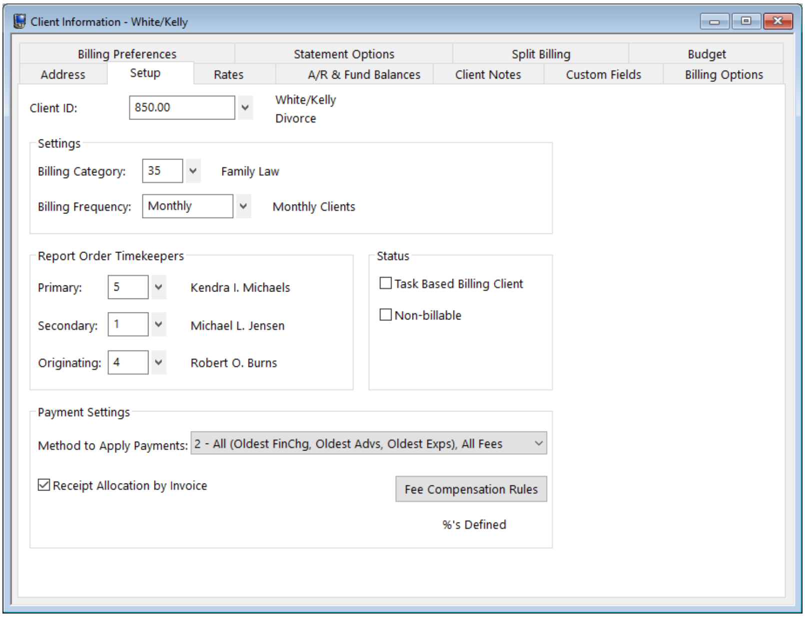

*Figure 6, Tabs3 Client File **Setup** tab*

Billing Frequency

The **Billing Frequency** field is used to classify clients by their billing schedule. Examples of billing frequencies include Monthly Billing, Contingency Billing, Progress Billing, and more. Billing Frequencies are defined by the firm via the **Setup** Task Folder.

More Info: Details can be found in Tabs3 Help or in the ***Administrator Guide***.

Report Order Timekeepers

The **Primary**, **Secondary**, and **Originating** timekeeper fields determine the order in which clients will appear on reports run in timekeeper order and have no other effect on the software.

Task Based Billing Client

The **Task Based Billing** check box is used to designate clients who are billed according to the Universal Task Based Management System (UTBMS). Clients who are set as task based billing clients have their fees and costs entered differently.

More Info: For more information on task based billing, see the Tabs3 Help or the ***Billing Methods Guide***.

Fee Compensation Rules

The **Fee Compensation Rules** button is used to assign exact specifications for receipt allocation.

More Info: For more information on Fee Compensation Rules, see the Tabs3 Help or the ***Administrator Guide***.

Other Tabs in the Tabs3 Billing Client File

The remaining tabs of the Client window are used to customize billing and statement settings. Additional information for each of these tabs can be found in the Tabs3 Help as well as the ***Administrator Guide***, ***Billing Methods Guide***, ***Statement Formatting Guide***, and ***Statements Guide***.

Training Videos

You can view the following training videos for more information. Clicking a link will open the associated training video in your browser. All training videos are also accessible in the software via the ***Help | Training Videos*** menu and at **Tabs3.com/t3video**.

Client Overview Video

Working with Secure Clients Video

Adding a New Tabs3 Individual Client Video

Adding a New Tabs3 Organization Client Video

Clients in PracticeMaster

Menu: ***File* | *Open* | *Client***
Home: ***All Actions* | *People* | *Client File***

The Client file in PracticeMaster focuses on case management. You can open the Client file from the **Client** Task Folder by clicking the **Client** icon.

Note: Because PracticeMaster tabs are customizable, the fields and screenshots in this guide may not match your firm's file layouts. The screenshots depicted here use the OEM layout that is shipped with PracticeMaster. See the PracticeMaster help or the ***Customizing PracticeMaster Guide*** for more details.

List tab in PracticeMaster

The **List** tab allows you to select which record you want to work with. You can optionally display a **SnapShot** of matter-specific information in this view. The **List** can be filtered using the **Search Box** or the **Filter** group in the Quick Clicks pane.

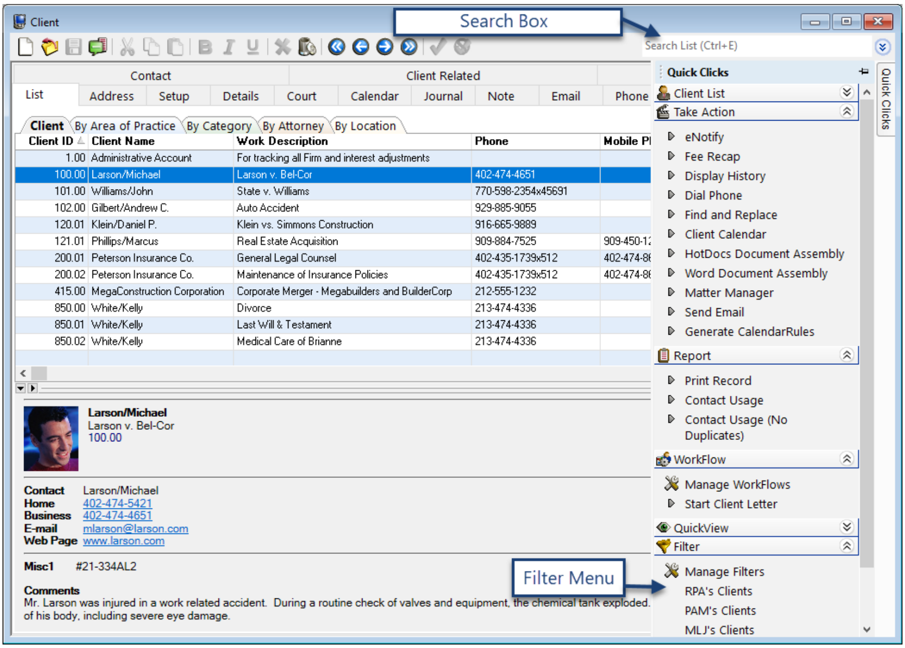

*Figure 7, PracticeMaster Client file **List** tab*

Address tab in the PracticeMaster Client File

The default **Address** tab in PracticeMaster is similar to the **Address** tab in Tabs3 Billing. As in the preceding sections, only fields that are not self-explanatory shall be explained in this Guide. Detailed information on any field can be found in PracticeMaster Help.

Setup tab in PracticeMaster

Like the Tabs3 Billing **Setup** tab, the **Setup** tab in PracticeMaster contains information regarding report order timekeepers and task based billing status. It also contains information regarding a matter's billing category (which is mirrored from Tabs3 Billing) and the matter's Area of Practice.

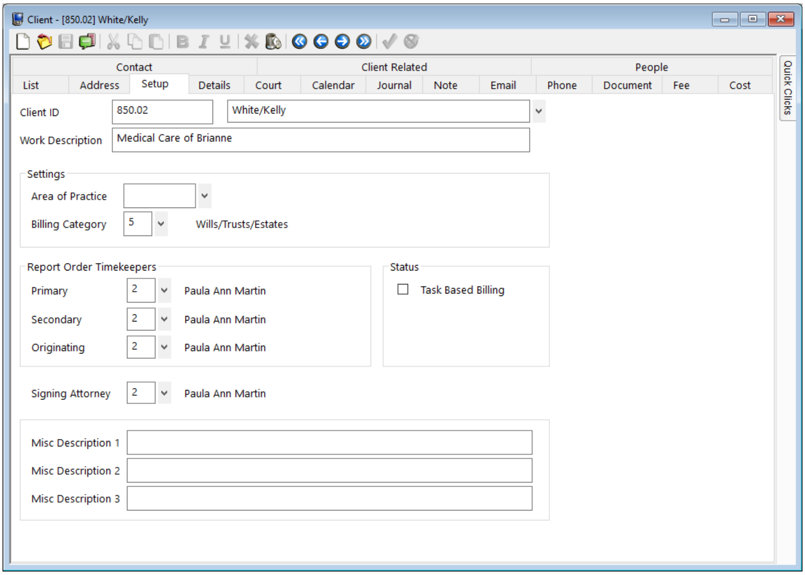

*Figure 8, PracticeMaster Client file **Setup** tab*

Area of Practice

An **Area of Practice** is a database of files specially tailored to a specific type of law, such as Probate, Real Estate, Estate, or Wills/Trusts/Estates. When an Area of Practice is selected for a matter, the individual files of the Area of Practice can appear as tabs at the top of the Client window.

Billing Category

Categories are used in Tabs3 to classify fee services into related groups for purposes of generating productivity reports by category of work. This information is mirrored in PracticeMaster.

Details tab in the PracticeMaster Client File

The **Details** tab contains detailed information on the client contact as well as the specific matter.

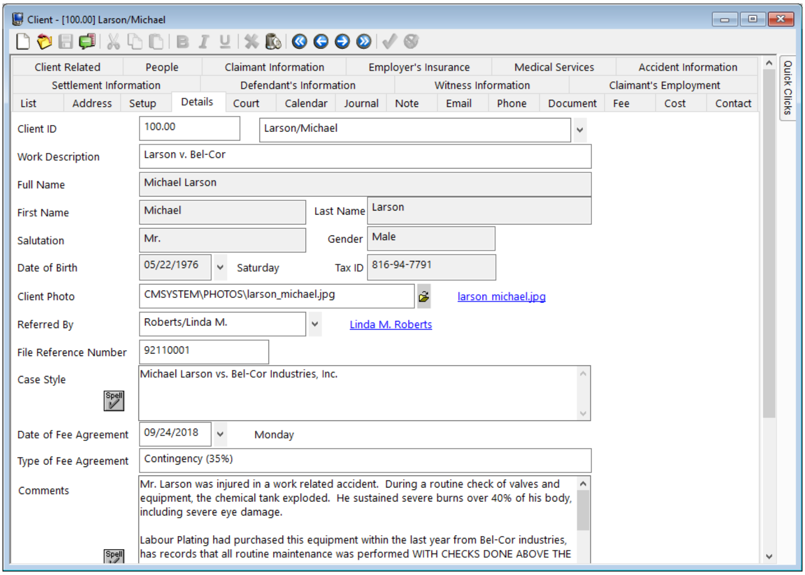

*Figure 9, PracticeMaster Client file **Details** tab*

Court tab in the PracticeMaster Client File

The default **Court** tab is used to enter information specific to the court involved in the matter. You can specify city, state, and county of jurisdiction as well as the opposing attorney, statute of limitations, and presiding judge.

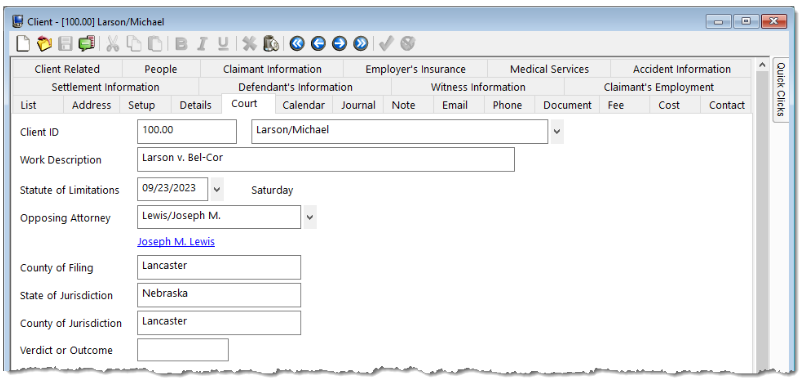

*Figure 10, PracticeMaster Client file **Court** tab*

Other Tabs in the PracticeMaster Client File

Along with the tabs above, the Client file can be configured by each user to display Journal entries, Area of Practice files, fees, costs, and related contact information. From the **Quick Clicks** pane, expand the **Customize Current View** group and click **Configure Client Pages** to see a list of files that can be displayed in the Client file.

Detailed information on each of these tabs can be found in PracticeMaster Help. PracticeMaster offers the flexibility to customize the Client file to your firm's needs.

Training Videos

You can view the following training videos for more information. Clicking a link will open the associated training video in your browser. All training videos are also accessible in the software via the ***Help | Training Videos*** menu and at **Tabs3.com/pmvideo**.

- **Client Overview Video**
- **Working with Secure Clients Video**
- **Adding a New Individual Client Video**
- **Adding a New Organization Client Video**

Clients in Trust Accounting Software

Unlike Tabs3 and PracticeMaster, Tabs3 Trust Accounting Software (TAS) does not have a Client file. Instead, TAS uses a Trust Account file to track information. However, trust account information is mirrored to Tabs3 Billing and PracticeMaster as client information.

> **More Info:** Detailed information on trust accounts can be found in the TAS Help and the ***Trust Accounting Guide***.

Contacts

Menu: ***(Tabs3 Billing/PM/TAS) File | Open | Contact***
Home: ***(Tabs3 Billing) All Actions | People | Contact Information***
(PM) All Actions | People | Contact File
(TAS) All Actions | Trust Accounts | Contact Information

Contacts are an integral component of the Tabs3 and PracticeMaster software. A contact is any individual or organization that does business with the firm, on behalf of a client or otherwise.

▸ To add a contact in Tabs3 Billing

1. From the **File** menu, select **Open**, and then click **Contact**.
2. Click .
3. Enter the remaining information for the contact record.
4. Click .

▸ To add a contact in PracticeMaster

1. From the **File** menu, select **Open**, and then click **Contact**.
2. Click .
3. In the New Contact window, enter the new Contact ID and click OK.
4. Enter the remaining information for the contact record.
5. Click .

▸ To add a contact in Tabs3 Trust Accounting Software

1. From the **File** menu, select **Open**, and then click **Contact**.
2. Click .
3. Enter the remaining information for the contact record.
4. Click .

The Contact Information window is very similar between Tabs3 Billing, PracticeMaster, and Trust Accounting Software. Most fields in the Contact file are self explanatory. However, some fields have certain requirements, which are explained below.

> **Note:** Unlike clients, contacts are not secure. If keeping contact information secure is a concern, we recommend creating a Secure Client *(page 3)* instead.

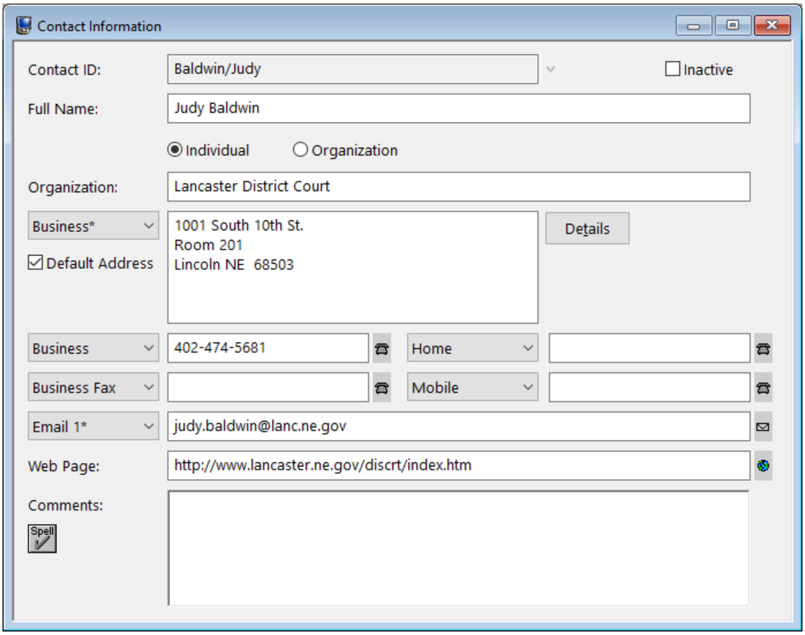

Figure 11, Tabs3 Contact Information window

Contact ID

The first field of the Contact Information window is the **Contact ID** field. A **Contact ID** is a unique identifier that distinguishes different contacts from one another. In Figure 11, the **Contact ID** is Baldwin/Judy. Because the **Contact ID** field must always be unique, you cannot enter another **Contact ID** of Baldwin/Judy.

Contact names will display differently based on the presence of a forward slash character. **Contact IDs** with a forward slash are treated as being in Last Name/First Name order, while **Contact IDs** with no slash are as is.

More Info: For more information on Contact ID formatting, refer to the Help.

Inactive

The **Inactive** check box is used to distinguish between active and inactive contacts. Marking contacts inactive allows you to use optional filters to reduce the number of records displayed on the **List** tab of the Contact file.

Individuals vs. Organizations

The format of the Contact ID determines whether Tabs3 and PracticeMaster will treat the contact as an individual or an organization. Contact IDs that include a forward slash "/" are marked as individual contacts, whereas Contact IDs without a forward slash are marked as organizational contacts. "Baldwin/Judy" is an example of an individual contact. "Lancaster District Court" is an example of an organizational contact.

The **Organization** field stores the details of an organization associated with an individual contact. The contents of the field vary depending on whether the currently selected contact is an individual or an organization. If an individual contact is selected, the field is optional and remains blank. If an organization contact is selected, the field will contain the same value as the **Contact ID** field and appear dimmed. This is because individuals can be linked to organizations, but organizations cannot be linked to other organizations.

Suppose that a firm is representing Rockwell Insurance Company in a case. The point of contact at Rockwell Insurance is Jeff Turner, an insurance adjuster. You can link Jeff Turner to Rockwell Insurance Company by entering Rockwell Insurance Company in the **Organization** field of Jeff Turner's contact record, as shown.

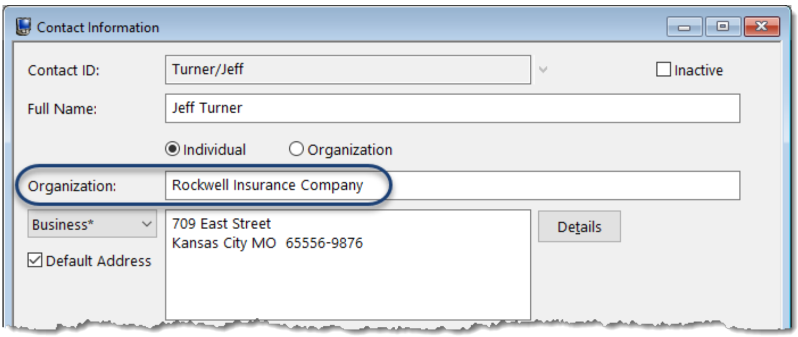

Figure 12, Individual Contact linked to an Organization

Address

The **Address** field allows you to store multiple addresses for a single contact. The default address differs depending on the currently selected contact. Individual contacts default to use a "Home" address, whereas Organization contacts default to use a "Business" address. An "Other" address option is available as well. The default can be changed by selecting another option and checking the **Default Address** check box.

Address information can be added directly to the **Address** block or by clicking the **Details** button and entering information in individual fields for **Address Lines 1-3**, **City**, **State**, and **Country** as shown in Figure 13 and Figure 14.

More Info: For more information regarding Address fields, refer to the Tabs3 Billing and PracticeMaster Help.

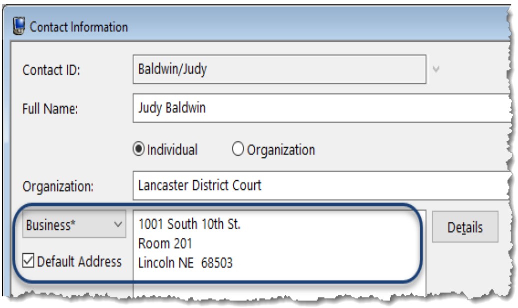

Figure 13, Contact Information window Address Fields

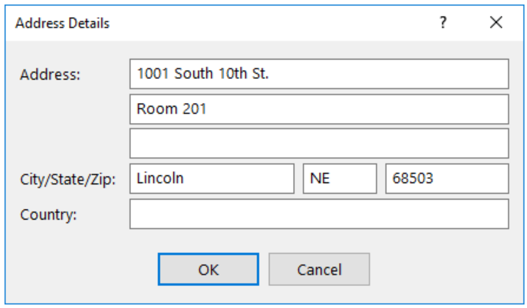

Figure 14, Address Details window

Phone/Email

You can configure up to 19 phone numbers and 3 email addresses for each contact. The Contact window displays four of the phone numbers and the default email address (designated with an asterisk). The selector next to each field allows you to select which address option will be displayed for a particular contact when selected.

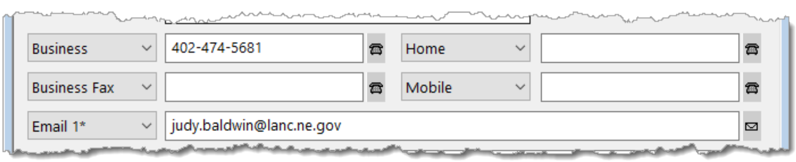

Figure 15, Contact Information window Phone and Email

Comments

The **Comments** field allows you to enter free-form information for a contact. The field can be spell checked and is searched when running a Conflict of Interest Check.

Contact Fields in the PracticeMaster Contact File

Along with the Contact Information window in Tabs3 Billing, the PracticeMaster Contact file contains additional tabs for tracking case-related contact information.

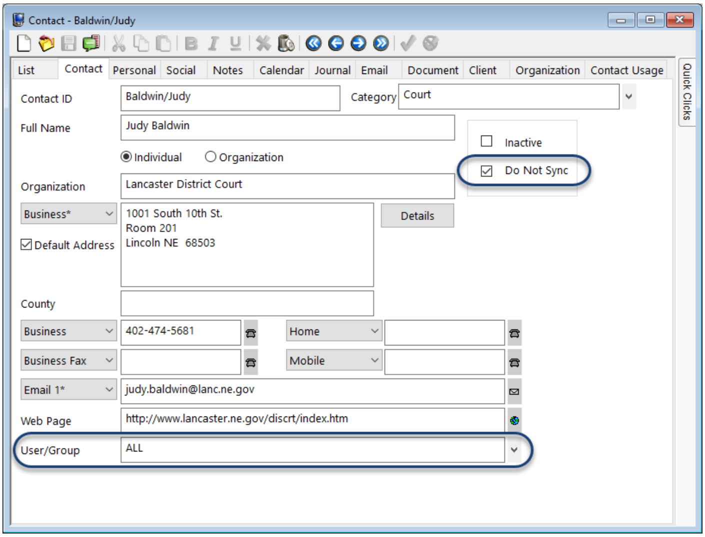

*Figure 16, PracticeMaster Contact file **Contact** tab*

Contact Tab

Much of the information in the **Contact** tab of the Contact file in PracticeMaster is mirrored in Tabs3 Billing. Additional fields related to PracticeMaster are defined below.

Do Not Sync

The **Do Not Sync** check box is used to prevent contact records from synchronizing with Outlook.

User/Group

The **User/Group** field is used to assign contacts to specific users and/or groups. This field is used for filtering and reporting purposes, and allows you to control which contacts are sent to users' address books during Outlook Synchronization.

More Info: For more information regarding contact synchronization, see the PracticeMaster Help or the Outlook Synchronization Guide.

Misc Tab

The default **Misc** tab contains introductory information regarding the contact, such as greeting preferences for correspondence purposes (full name or last, salutation, etc.) general background, and tracking of contact dates.

Other Tabs in the PracticeMaster Contact File

The Contact file can be customized to display additional tabs for other files that link to the Contact file. From the **Quick Clicks** pane, expand the **Customize Current View** group and click **Configure Contact Pages** to see a list of files that can be displayed in the Contact file.

> **Best Practice:** The **Organization** tab of the Contact file displays all contacts associated with an organization. We recommend selecting this tab in **Configure Contact Pages** in order to easily locate all contacts associated with an organization.

Converting Contacts into Clients

Creating a new client record from an existing contact record is simple. In both Tabs3 Billing and PracticeMaster, you can create a new client record as normal by selecting an existing contact from the Client Name drop-down. You can also use the **Create Client** function in PracticeMaster to create a client directly from the Contact file. The **Create Client** option is available in the **Take Action** group of the Quick Clicks pane when in the Contact file.

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the software via the ***Help | Training Videos*** menu and at **Tabs3.com/pmvideo**.

Contact Management Key Concepts Video

Contact Usage

The Contact Usage feature, available in PracticeMaster, is a powerful tool that displays a list of all records in which the selected contact is used. This information can be accessed via the **Contact Usage** tab of the contact file or by running a Contact Usage Report. This differs from the **Organization** tab in that the **Organization** tab only lists the contact information for each contact associated with an organization, where Contact Usage displays all instances where a contact is linked in the software.

Contact Usage Tab

Menu: ***File | Open | Contact | Contact Usage tab***
Home: ***All Actions | People | Contact File | Contact Usage tab***

The Contact Usage tab can be displayed using one of four Views: **Detail**, **Client Summary**, **File**, or **Record**.

Detail	The **Detail** option provides a list of all records in which the selected contact is used. If a record is associated with a client, the Client ID, name, and work description are displayed followed by the file and field name the record appears in. Records not associated with a client are displayed at the top of the list with the file and field name.
Client Summary	The **Client Summary** option provides a list of all records for clients with which the selected contact is associated. The Client ID, name, and work description are displayed. This list will only display information when the contact is linked to a client record.
File	The **File** option provides a list of all records assigned to a contact grouped by file. For example, a calendar record with a contact assigned to it will be displayed under the Calendar file group.
Record	The **Record** option provides a list of all records assigned to a contact. The records are sorted based on the modified date with the most recently modified record displayed at the top.

In the following example, the **View** is set to **Record**.

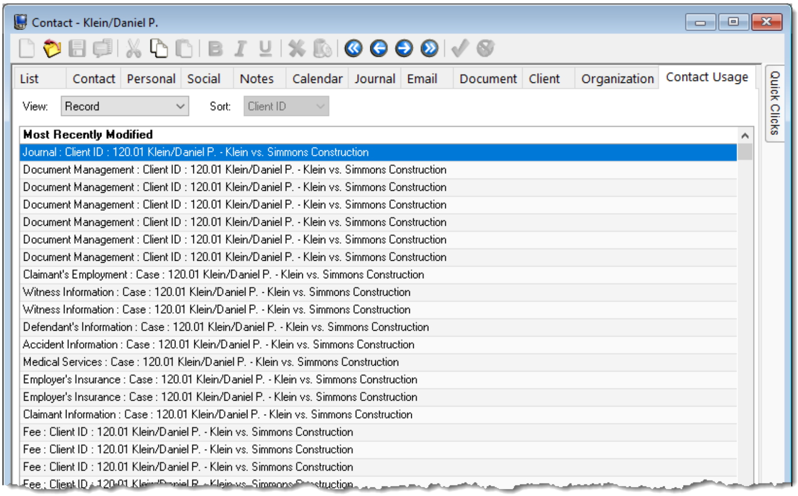

Figure 17, PracticeMaster Contact file ***Contact Usage*** *tab*

Contact Usage Reports

You can generate printable reports containing contact usage information. These reports consist of the Contact Usage Report, which displays all usage information, the Calendar Usage Report, which displays calendar records that include the contact, and the Journal Usage Report, which displays journal records that include the contact. These reports are accessible via the **List** tab of the Contact file in the **Reports** group of the **Quick Clicks** pane.

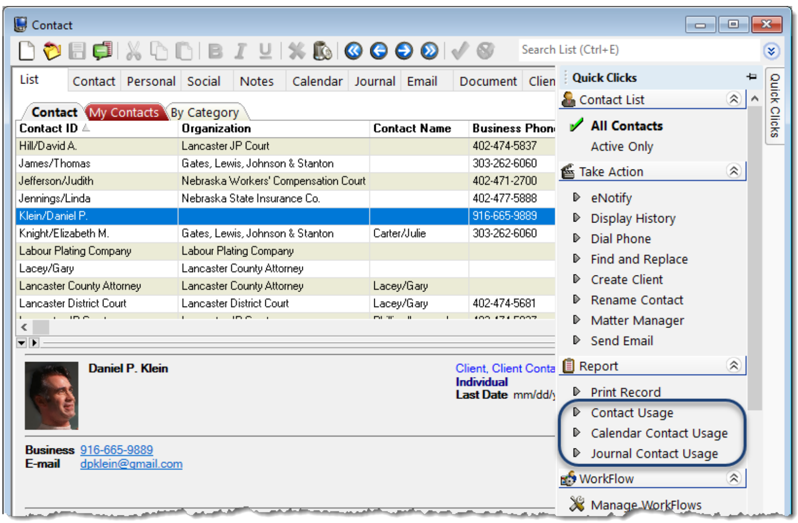

Figure 18, Contact Usage Reports via ***Quick Clicks*** *pane in PracticeMaster*

Date: 11/26/2018 **Contact Usage Report** Page: 1

Jensen, Martin & Anderson, P.C.

File(s) Searched: **All Files**

Contact ID: **Klein/Daniel P.**

File	Field	Client ID	Client Name	Client Desc	Calendar/Journal Desc
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Verify receipt of medical records req
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Joint Statement of Evidence
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Initial Client Meeting.
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Hearing
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Hearing
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Hearing
Client	Client Name	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Client	Contact Name	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Document Managem	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Document Managem	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Document Managem	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Document Managem	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Document Managem	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Document Managem	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Scaffolding information

Total records found: 15

Figure 19, PracticeMaster Contact Usage Report

Training Videos

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the software via the ***Help | Training Videos*** menu and at **Tabs3.com/pmvideo**.

Contact Usage Video

Contact Utilities

Tabs3 Billing and PracticeMaster programs contain features designed to help you manage your contact more easily.

Rename Contact

Menu: ***(Tabs3 Billing/PM/TAS) Maintenance | Renumber | Rename Contact***

Home: ***(Tabs3 Billing/PM/TAS) All Actions | Utilities & Maintenance | Renumber Utilities | Rename Contact***

The Rename Contact program, available in Tabs3 Billing, Trust Accounting Software, and PracticeMaster, makes it easy to change a contact name.

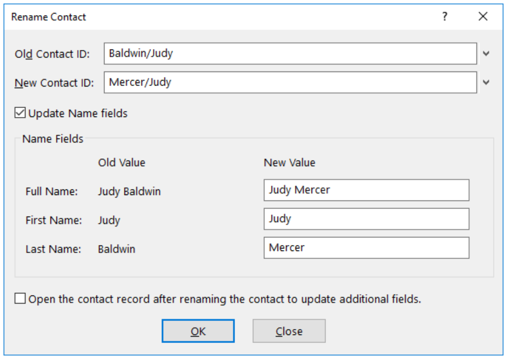

Figure 20, Rename Contact window

Suppose Judy Baldwin has married and is now Judy Mercer. Use the **Old Contact ID** drop-down to select the existing Contact ID, then simply type in the **New Contact ID** in the field below. You can optionally select the **Update Name fields** box to update the **Full Name**, **First Name**, and **Last Name** fields as well. Additionally, you can select the **Open the contact record after renaming the contact to update additional fields** check box to quickly update additional contact information such as email addresses.

Contact Categories

Contact categories are available in PracticeMaster to help simplify the filtering process by allowing you to classify contacts based on similar attributes. You can assign up to twenty different contact categories to a single contact. You can also define your own contact categories.

▸ To create a new Contact Category

1. From the PracticeMaster **File** menu, select **Open**, and then click **Contact**.
2. Click the **Contact** tab to the right of the **List** tab.
3. Find the **Contact Category** field and click the drop-down button on the right side to open the Contact Categories window.
4. Click the **New** button.

5. Enter the desired Contact Category.
6. Click **OK** to save the new Contact Category.

Full Name	Organization	Contact Category	Business Phone
Judy Baldwin	Lancaster District Court	Court	402-474-5681
Bennington & Morris	Bennington & Morris	Attorney	402-649-8827
Mark Benson	National Security Life Insurance	Insurance Agent	303-488-6614
Sandra Berg	Bennington & Morris	Attorney	402-649-8827
Gregory Binder	Lancaster District Court	Court	402-474-5681
Darlene Blackstone	Williams, Wilson & Harrison	Attorney	402-475-9961
Brown Court Reporting Services	Brown Court Reporting Services	Court Reporter	402-484-9157
Stephanie J. Brown	Brown Court Reporting Services	Court Reporter	402-484-9157
Bryan LGH East Hospital	Bryan LGH East Hospital	Medical Provider	
Julie Carter	Gates, Lewis, Johnson & Stanton	Attorney	303-262-6060
Cook County Criminal Court	Cook County Criminal Court	Court	312-603-1928
Jeff W. Daniels	Lancaster District Court	Court	402-474-5681
Marci Davis	Wallace, Benson & Benson	Attorney	816-545-4419
Farmer's Mutual Health & Life Ins	Farmer's Mutual Health & Life Ins	Insurance Companies	402-474-9916
Paul Franklin	Peterson Insurance Co.	Client Contact|Insurance Agent	402-435-1739x512
Gates, Lewis, Johnson & Stanton	Gates, Lewis, Johnson & Stanton	Attorney	303-262-6060
Andrew C. Gilbert		Client|Client Contact	929-885-9055

Figure 21, PracticeMaster Contact file ***Contact Categories***

Merge Contacts

Menu: ***Maintenance | Renumber | Merge Contacts***
Home: ***Utilities & Maintenance | Renumber Utilities | Merge Contacts***

The Merge Contacts program, available in PracticeMaster only, is used to combine information from two contact records into a single contact record. This is especially useful in situations where two different users have entered the same contact information with slightly differing values.

Figure 22, PracticeMaster ***Merge Contacts*** *program*

▸ **To merge two contact records into a single Contact record:**

1. From the **Maintenance** menu, point to **Renumber** and then click **Merge Contacts**.
2. Enter the Contact IDs of the contacts you want to merge in the **Contact 1** and **Contact 2** fields.
3. Select the **Differing Fields**, **Fields with Values**, or **All Fields** radio button to display information for each contact. We recommend selecting **Differing Fields** in order to easily locate discrepancies.
4. Select each field you want to keep in the merged contact record. Only highlighted fields will be retained.
5. Click **Merge**.

Client Utilities

The utilities discussed in this section are designed to simplify the process of updating client information.

Renumber Client

Menu: ***(Tabs3 Billing/PM) Maintenance | Renumber | Client***
Home: ***(Tabs3 Billing/PM) All Actions | Utilities & Maintenance | Renumber Utilities | Renumber Client***

The Renumber Client program in Tabs3 Billing is used to assign a new Client ID to an existing client. This process affects the client's accounts receivable, work-in-process transactions, archive transactions, and productivity amounts.

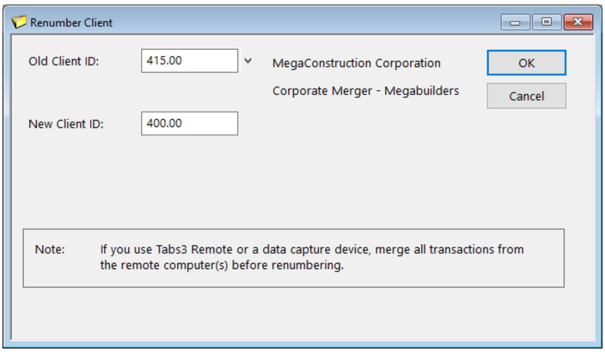

*Figure 23, **Renumber Client** program in Tabs3*

Change Client Options

Menu: ***Maintenance | Client Related | Change Client Options***
Home: ***All Actions | People | Change Client Options***

The Change Client Options program in Tabs3 Billing is used to change options in the Client file for one or more clients. This is especially useful in situations where you may need to make a system-wide change, such as implementing sales tax for all clients. The **Client** tab allows you to enter a range of clients and optionally filter by specific settings, while the remaining tabs contain information that can be updated using Change Client Options.

More Info: Detailed instructions on using the Change Client Options program can be found in the Tabs3 Billing Help.

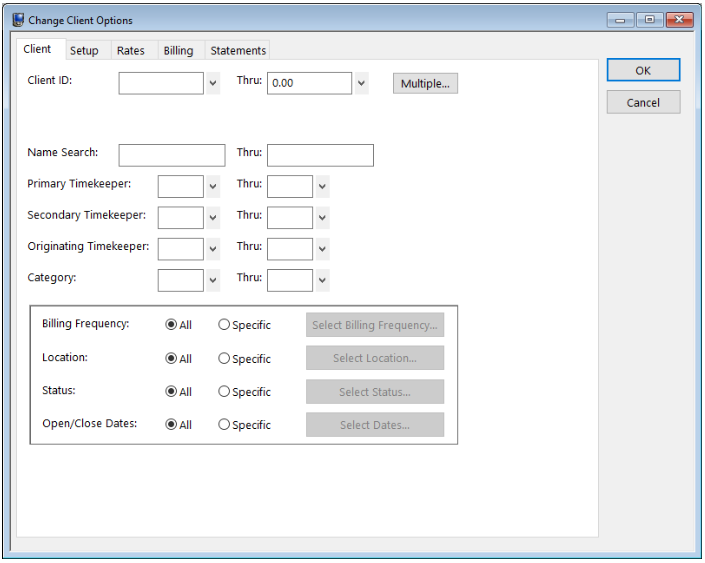

Figure 24, Tabs3 ***Change Client Options*** *program*

Reports

Client and Contact Lists

Menu: ***(Tabs3 Billing) Reports | Client | Client List***
(PM) Reports | Report Writer | Master Client List

Home: ***(Tabs3 Billing) All Actions | Reports | Client Reports | Client List***
(PM) All Actions | Reports | Report Writer | Master Client List
(PM) All Actions | Reports | Report Writer | Detail Contact List

Client Lists can be generated in Tabs3 Billing and PracticeMaster. The Tabs3 Billing Client List includes client and contact information and can be run in Detail or Summary mode depending on the amount of information required. PracticeMaster's robust Report Writer program allows you to modify the existing Client List reports or create a report of your own. PracticeMaster also includes several Contact Lists that can be customized to fit your firm's needs.

Date: 11/26/2018 **Tabs3 Client List** Page: 1
Jensen, Martin & Anderson, P.C.

100.00M Larson/Michael

Larson/Michael
RE: Larson v. Bel-Cor
#21-334AL2

P: 001 MLJ
S: 003 RPA
O: 001 MLJ

Bus: 123 Washington St.
Lincoln NE 68508

Date Opened: 09/24/2018
Location: Lincoln
Rate Code: 1
Category: 010
Workers' Compensation

Contact: Michael Larson
Company:
Mobile:
Email: mlarson@larson.com
Stmt Delivery: Mail/Email
Home: 402-474-5421
Business: 402-474-4651
Email Template: EXAMPLE

101.00M Williams/John

Williams/John
RE: State v. Williams

P: 002 PAM
S: 001 MLJ
O: 001 MLJ

Other: 21225 Amberwood
Chicago IL 60662

Date Opened: 08/28/2018
Location: Omaha
Rate Code: 0
Category: 050
Criminal Law

Contact: John Williams
Business: 770-598-2354x45691
Mobile:
Email: jw2000@net.com
Stmt Delivery: Mail/Email
Home: 770-598-2442
Business Fax:
Email Template: EXAMPLE2
Flat Amount: 579.90

Figure 25, Tabs3 Detail Client List

Date: 11/26/2018 **Master Client List** Page: 1
Jensen, Martin & Anderson, P.C.

Case Range: 100.00 to 999.99
Attorney Range: 1 to 999

Larson/Michael 123 Washington St. Lincoln, NE 68508					
100.00	WC	Larson v. Bel-Cor	Larson/Michael	402-474-4651	MLJ
Williams/John 21225 Amberwood Chicago, IL 60662					
101.00	CRIMLAW	State v. Williams	Williams/John	770-598-2354x45691	PA
Gilbert/Andrew C. 8974 Weatherby Road Roswell, NM 88277					
102.00	PI	Auto Accident	Gilbert/Andrew C.	929-885-9055	PA
Klein/Daniel P. 795 North Apple Sacramento, CA 98654					
120.01	WC	Klein vs. Simmons Construction	Klein/Daniel P.	916-665-9889	RP

Figure 26, PracticeMaster Master Client List

Training Videos

You can view the following training videos for more information. Clicking a link will open the associated training video in your browser. All training videos are also accessible in the software via the ***Help | Training Videos*** menu and at **Tabs3.com/pmvideo**.

Contact Usage Video

Contact Search Video

Client List Video

Resources

Clients and contacts are an integral part of the Tabs3 Billing and PracticeMaster software. Along with the basic concepts introduced in this Guide, there are several additional resources available, including:

Help

The Help contains detailed information on all features of the software. The Help is accessible by pressing F1 from anywhere within the software; doing so will load the Help information for the particular topic being accessed.

Training Videos

Training videos are multimedia resources that walk you through Tabs3 Billing and PracticeMaster features. Select ***Help | Training Videos*** to access the training video libraries. The training videos can also be accessed at:

Tabs3.com/videos

Knowledge Base

Tabs3's extensive Knowledge Base is available 24 hours a day, 7 days a week. The Knowledge Base can be accessed from within the software by selecting ***Help | Internet Resources | Knowledge Base***.

All Knowledge Base articles can be accessed from any Internet-enabled device by navigating to

support.Tabs3.com

Guides

Additional Guides are available to help you familiarize yourself with the Tabs3 and PracticeMaster software. Also available are Sample Report Packs, which provide detailed descriptions, definitions, and examples of reports included with the software.

All guides and sample report packs are available on our Web site at:

Tabs3.com/support/docs.html

Index

A

Adding
- clients 2
- contact categories 21
- contacts in PracticeMaster 12
- contacts in Tabs3 12
- matters 2

Address (Contacts) 15
Address tab
- in PracticeMaster 9
- in Tabs3 4

Administrator Guide 2
Area of Practice
- definition 9

B

Base Matter
- definition 3

Billing Frequency 6
Billing Methods Guide 7

C

Categories
- *See* Contact Categories

Change Client Options 23
Client
- adding a client 2
- Address tab in PracticeMaster 9
- Address tab in Tabs3 4
- Court tab in PracticeMaster 10
- definition 1
- Details tab in PracticeMaster 10
- in PracticeMaster 8
- in Tabs3 4
- in TAS 11
- inactive 5
- List tab in PracticeMaster 8
- marking a client secure 3
- Other tabs in PracticeMaster 11
- Other tabs in Tabs3 7
- secure client 3
- Setup tab in PracticeMaster 9
- Setup tab in Tabs3 6
- vs matter 2

Client ID
- definition 2

Client List 24
- PM Master Client List example 25
- Tabs3 Detail Client List example 25
- training video 26

Client Utilities 23
- Change Client Options 23
- Client List 24
- Contact List 24
- Renumber Client 23
- Reports 24
- training videos 26

Contact Categories 21
- adding 21

Contact Fields
- in PracticeMaster Contact file 16

Contact List 24
Contact Management
- training video 17

Contact Search
- training video 26

Contact Usage 17
- reports 19
- tab in Contact file 18
- training video 20, 26

Contact Usage Reports 19
- in Quick Clicks pane 19

Contact Utilities
- contact categories 21
- Merge Contacts 22
- Rename Contact 21

Contacts 12
- adding a contact in PracticeMaster 12
- adding a contact in Tabs3 12
- adding a contact in TAS 12
- benefit of contact records 1

- Contact ID definition ... 13
- Contact Information Window ... 13
- converting into clients ... 17
- definition ... 1, 12
- inactive ... 13
- individuals vs. organizations ... 14
- matter contact ... 4

Converting Contacts Into Clients ... 17

Court tab
- in PracticeMaster ... 10

D

Details tab
- in PracticeMaster ... 10

Do Not Sync ... 16

G

Guides ... 27

H

Help ... 27

I

Inactive Clients ... 5

Inactive Contacts ... 13

Individual Contacts ... 14

K

Key Concepts ... 1

Key Type ... 2

Knowledge Base ... 27

L

List tab
- in PracticeMaster ... 8

M

Matter
- base matter ... 3
- definition ... 2

Matter Contact
- definition ... 4
- example ... 5

Merge Contacts ... 22
- instructions ... 23

O

Organization Contacts ... 14

P

PracticeMaster Client File ... 8

PracticeMaster Contact File ... 16
- Contact tab ... 16
- Misc tab ... 17
- Other tabs ... 17

R

Rename Contact ... 21

Renumber Client ... 23

Reports ... 24

Resources
- Guides 27
- Help 27
- Knowledge Base 27
- Training Videos 27
- contact categories 21
- contact utilities 21
- Merge Contacts 22
- Rename Contact 21
- Renumber Client 23

S

Secure Clients 12
- definition 3
- marking a client secure 3

Setup tab
- in PracticeMaster 9
- in Tabs3 6

Statement Formatting Guide 7
Statements Guide 7

T

Tabs3 Client File 4
TAS
- *See* Trust Accounting Software

Training Videos 27
- Client List 26
- Client Utilities 26
- clients in PracticeMaster 11
- clients in Tabs3 7
- contact management 17
- Contact Search 26
- Contact Usage 26

Trust Accounting Guide 11
Trust Accounting Software
- clients in TAS 11

U

Usage Reports 19
Utilities
- Change Client Options 23
- client utilities 23

V

Videos 27
- Client List 26
- Client Utilities 26
- clients in PracticeMaster 11
- clients in Tabs3 7
- contact management 17
- Contact Search 26
- Contact Usage 26