

# Tabs3 Connect Quick Guide



Tabs3 Billing



PracticeMaster



Trust Accounting



Accounts Payable




General Ledger

## **Tabs3 Connect Quick Guide**

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Software Technology, LLC  
1621 Cushman Drive  
Lincoln, NE 68512  
(402) 423-1440  
[Tabs3.com](https://www.tabs3.com)

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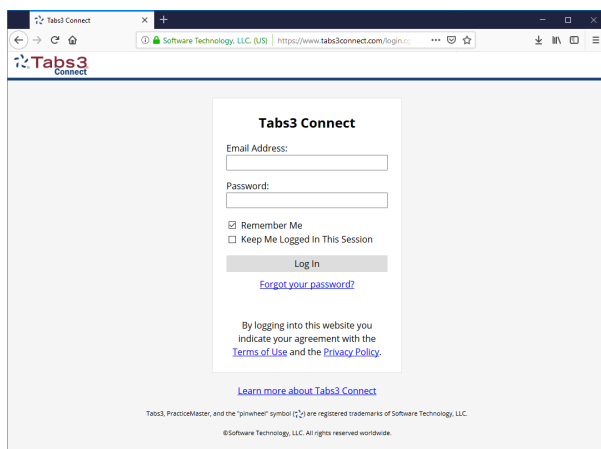
# Quick Guide to Tabs3 Connect

Tabs3 Connect provides access to Tabs3 Billing and PracticeMaster anywhere you can connect to the Internet. Tabs3 Connect gives you access to your client and contact information, fee and cost entry, personal and firm-wide calendar, and more. This guide will provide you with all the information you need to start using Tabs3 Connect! Tabs3 Connect is available at no extra charge for firms enrolled in maintenance plans for PracticeMaster Platinum (and Tabs3 Billing, if installed). Alternatively, a Tabs3 Connect annual subscription can be purchased for each user by firms who have a Tabs3 Billing Platinum license.

## Getting Started

There are no apps to download to use Tabs3 Connect, simply connect to the Internet using your iPhone®, Android device, iPad®, laptop, or even Apple® computer.

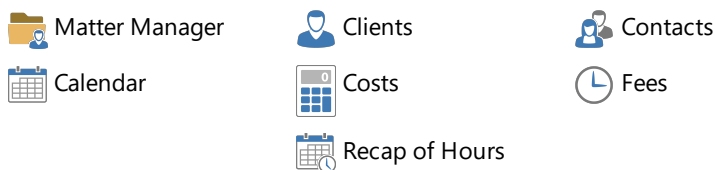
Steps for configuring Tabs3 Connect can be found in Knowledge Base Article [R11480](#), "All About Tabs3 Connect" ([support.tabs3.com](http://support.tabs3.com)).



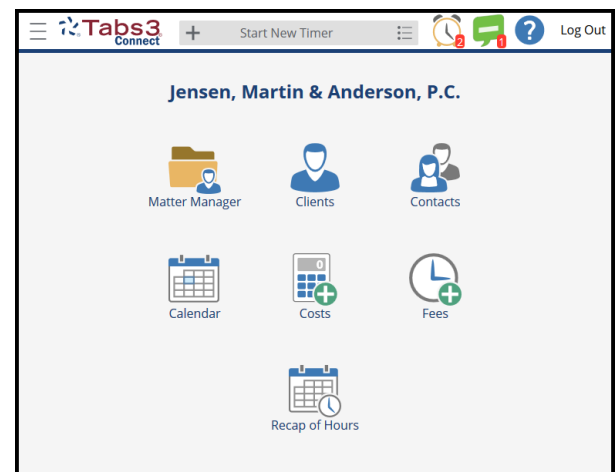
## Logging in to Tabs3 Connect

To begin, use your web browser to navigate to [Tabs3Connect.com](http://Tabs3Connect.com) and enter the email address and password that you are configured to use for Tabs3 Connect. The **Remember Me** option can be used to save you from having to enter your email address on future visits, but your password is not remembered for security reasons. The **Keep Me Logged In This Session** option will prevent you from being logged out due to inactivity (not recommended for mobile or public devices).

From the Home page, you can access any of the major features of Tabs3 Connect by clicking their respective icon:




These icons are shown at the top of each page; If there is not enough space, or when using the Phone Layout, tap the ☰ icon at the top of the page to access these features. The **Timer**, **Alarms**, and **eNotes** are always available at the top of the window.





**Note:** When logging in with a Platinum Tabs3 Billing only license, available features include **Matter Manager**, **Clients**, **Costs**, and **Fees**. To access **Contacts** and **Calendar** via Tabs3 Connect, you must have a Platinum Tabs3 Billing license and a Platinum PracticeMaster license, or a Tabs3 Connect PracticeMaster-only subscription license.

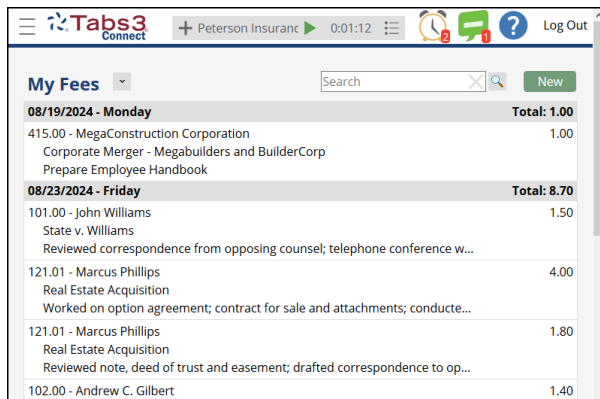
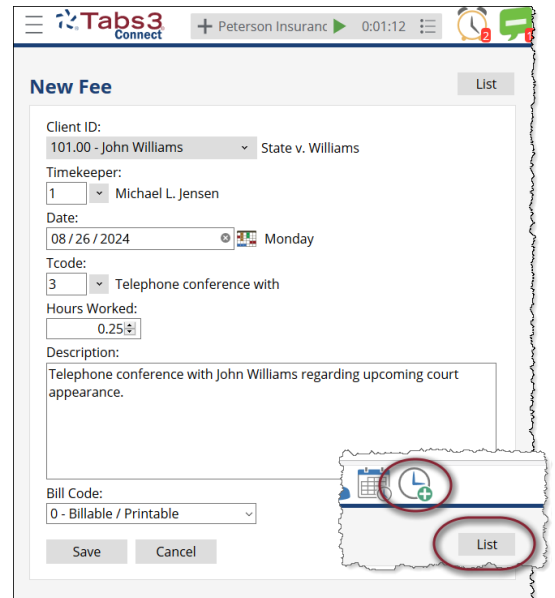
**Tip:** The default start page can be customized for each user in System Configuration. You may want to start with the default **Home** page shown above, or begin with the **Matter Manager** page, it's your choice!

**Tip:** You can always return to the Home page from any page by tapping the  logo.

## Entering Fees & Costs

To enter a new fee into Tabs3 Connect, tap the  icon on the Home page or at the top of the page within Tabs3 Connect. This will bring you to a New Fee page using today's date as demonstrated in the figure to the right. The default client is the client that you most recently accessed using Tabs3 Connect, Tabs3 Billing, or PracticeMaster.

1. Tap the  button to select a client. You may need to tap the **View All** button or use the **Search** bar to find the client. Once the desired client is found, tap their name to select it.
2. Enter the **Timekeeper**, **Date**, **Tcode**, **Hours Worked**, **Description**, **Bill Code**, and optionally **Geolocation**.
3. Tap **Save**. The fee will be available immediately in Tabs3 Billing and PracticeMaster back at the office.




My Fees	Search	New
<b>08/19/2024 - Monday</b>		<b>Total: 1.00</b>
415.00 - MegaConstruction Corporation		1.00
Corporate Merger - Megabuilders and BuilderCorp		
Prepare Employee Handbook		
<b>08/23/2024 - Friday</b>		<b>Total: 8.70</b>
101.00 - John Williams		1.50
State v. Williams		
Reviewed correspondence from opposing counsel; telephone conference w...		
121.01 - Marcus Phillips		4.00
Real Estate Acquisition		
Worked on option agreement; contract for sale and attachments; conducte...		
121.01 - Marcus Phillips		1.80
Real Estate Acquisition		
Reviewed note, deed of trust and easement; drafted correspondence to op...		
102.00 - Andrew C. Gilbert		1.40

## Viewing a List of Fees

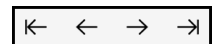
Tabs3 Connect allows you to view a list of all work-in-process fees assigned to the Timekeeper with which your User account is associated. To view your list of fees, tap the **List** button located at the top of a New Fee page. The My Fees page is shown to the left.

Hours Worked are totaled by date. Fees can be searched by using the **Search** bar.

**Tip:** Tap the  in the Search bar to clear the previous search.

To switch back to the New Fee page, tap the **New** button at the top of the page.

Some lists in Tabs3 Connect are too long to fit on one page. Use the navigation buttons at the bottom of the page to view additional pages of the list.







## Editing a Fee

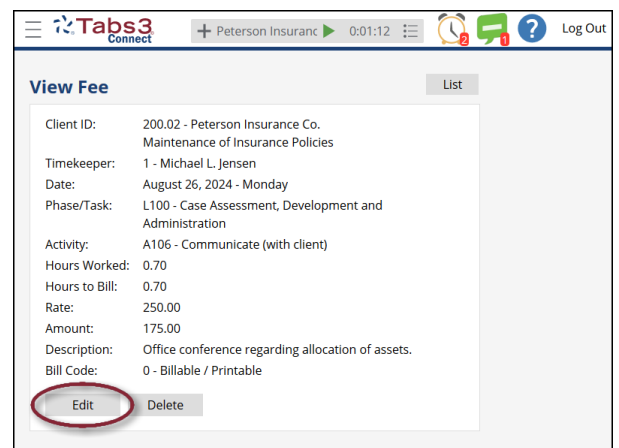
Fees can be edited after they have been saved. To edit a fee, simply tap it on the My Fees page. This brings you to the View Fee page, which shows detailed information about the fee and provides you the option to edit or delete it.

To edit this fee, tap **Edit**. The Edit Fee page is similar to the New Fee page, but allows you to edit three additional fields: **Hours to Bill**, **Rate**, and **Amount**.


After you have made your edits, tap the **Save** button.

## Timer


A timer is available at the top of the page within Tabs3 Connect. Tap **Start New Timer** or the  icon to start a new timer. Pause the timer by tapping , restart it by tapping , or access a list of existing timers by tapping . Timer tasks can also be accessed in the Matter Manager.

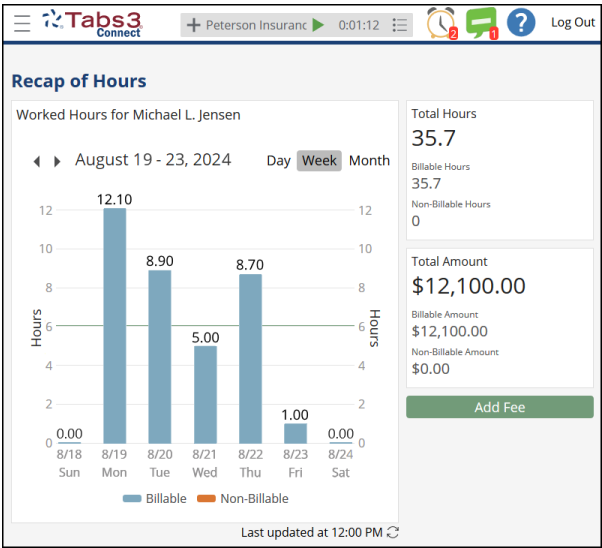


Cost Entry

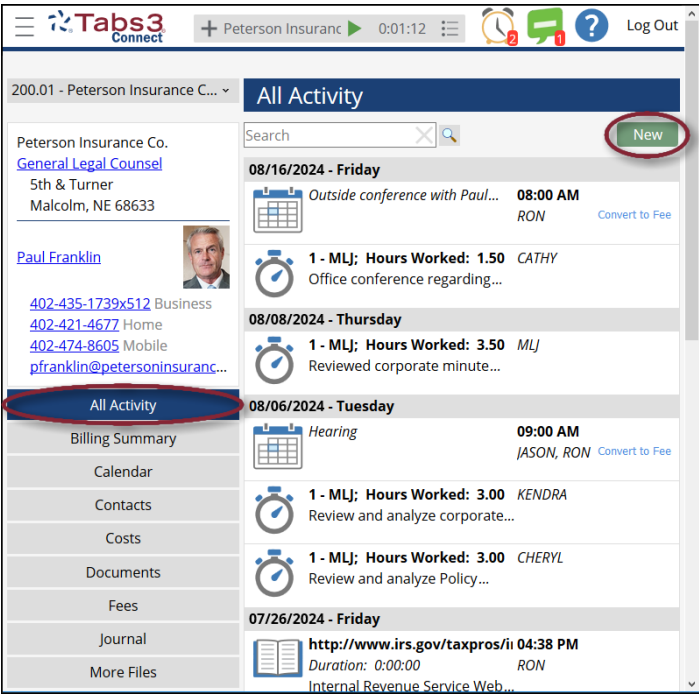
Entering costs while away from the office is just as easy as entering fees. To begin, tap the  icon on the Home page or at the top of the page within Tabs3 Connect. From here, you can add, view, edit, or delete costs just like you can with fees.

Recap of Hours


Tabs3 Connect allows you to view a graph showing billable and non-billable fees assigned to the Timekeeper with which your User account is associated. To view the Recap of Hours, tap the  icon on the Home page or at the top of the page within Tabs3 Connect. The Recap of Hours window can display a daily, weekly, or monthly view of fees. You can scroll back to view previous time periods using the arrow buttons next to the graph. The total for the period is also shown. An example of the Recap of Hours is shown to the right.



Using the Matter Manager



Tabs3 Connect offers you the features of PracticeMaster Matter Manager while you are on-the-go. The Matter Manager displays contact information, lists of records, and billing information.

To access the Matter Manager, tap the  button on the Home page or at the top of the page within Tabs3 Connect.

The top-left corner of the Matter Manager displays Client and Contact information for the selected matter. You can even interact with this information:

Tap...	...to perform the following action:
Work Description	Open the Client file.
Contact name	Open the Contact file.
Address	Open your device’s map feature.
Phone number	Open your smartphone’s dialer feature.
Email address	Open your device’s default email client.

The Matter Manager has many informational views located on the left side of the page. To view any of these informational screens, tap the corresponding button.

The **All Activity** view is displayed in the figure above. This view displays a list of all records for a client matter, arranged by date. Each type of record is shown with an icon, indicating its type, and information specific to that record.

Tap the **New** button to enter a calendar entry, cost, fee, note, phone journal, time journal, or research journal record for this matter. The **Convert to Fee** link lets you quickly convert a record to a fee.

**Tip:** The Convert to Fee icon is not available in Matter Manager when using the **Phone Layout** due to screen limitations.

Viewing the Billing Summary

Tap the **Billing Summary** button to display information about the selected client matter's accounts receivable and billing activity. The Billing Summary page is demonstrated in the figure to the right.

Use the **Billing Summary** page as a quick overview of what has been billed to a client, and what is available to bill to them. Work-in-Process fees and costs are shown, along with their client funds balance, last payment, and more.

**Tip:** Billing Summary information cannot be edited using Tabs3 Connect. The Billing Summary is not available when using a PracticeMaster-only license of Tabs3 Connect.

Select a Record Type X

Calendar

Cost

Fee

Note

Phone Task

Time Task

Research Task

Tabs3 Connect

+ Peterson Insurance

0:01:12

Log Out

200.01 - Peterson Insurance C...

Billing Summary

Peterson Insurance Co.

General Legal Counsel

5th & Turner

Malcolm, NE 68633

Paul Franklin

402-435-1739x512 Business

402-421-4677 Home

402-474-8605 Mobile

pfranklin@petersoninsurance...

All Activity

Billing Summary

Calendar

Contacts

Costs

Documents

Fees

Journal

More Files

Amount Due: \$2,725.35

Work-in-Process Fees: 5,600.00

Work-in-Process Costs: 12.00

Current Balance: 8,337.35

Funds Balance: 0.00

Primary Timekeeper: 1 - Michael L. Jensen

Billing Category: 40 - Business Law

Last Payment: \$275.00 07/27/2024

Last Statement: #7594 07/24/2024

Aging Period

Balance

0 - 30 1,551.19

31 - 60 1,174.16

61 - 90 0.00

91 - 120 0.00

121 - 180 0.00

181+ 0.00

Trust Bank Accounts

Balance

Total: \$0.00

Documents & Email Attachments

Tabs3 Connect

+ Peterson Insurance

0:01:12

View Document

Document Name: Assembled\Larson, Michael\100\00\FEE-Fee Agreement.doc

Date: August 26, 2024 - Monday

Description: Fee Agreement

Client ID: 100.00 - Michael Larson

Larson v. Bel-Cor

Contact: Michael Larson

Document Type: FEE - Fee Agreement

Created By: JEN

Responsible: MLJ

Comments:

Created On: 05/21/2024 01:49 PM

Modified On: 08/26/2024 08:27 AM

Status: Available

Convert to Fee

Prior Versions

Tap the **Documents** button in the Matter Manager to view a list of associated documents for the selected matter. These documents can even be downloaded from Tabs3 Connect to your mobile device.

**Tip:** Although documents can be downloaded using Tabs3 Connect, any changes made to the documents cannot be uploaded or saved to the server directly from Tabs3 Connect.

Tap the **Journal** button in the Matter Manager to view a list of journal records for the selected matter. These journal records can be viewed, edited, and deleted.

Tabs3 Connect

+ Peterson Insurance

0:01:12

View Email

Date: August 26, 2024 - Monday

Time: 09:11 AM

To: Ron@jensenmartinlaw.com

From: Mark A Nelson <MNelson@nelsonlaw.com>

Client ID: 120.01 - Daniel P. Klein

Klein vs. Simmons Construction

Contact:

Attachments: Stipulation.pdf

Subject: Daniel Klein v. Simmons Construction

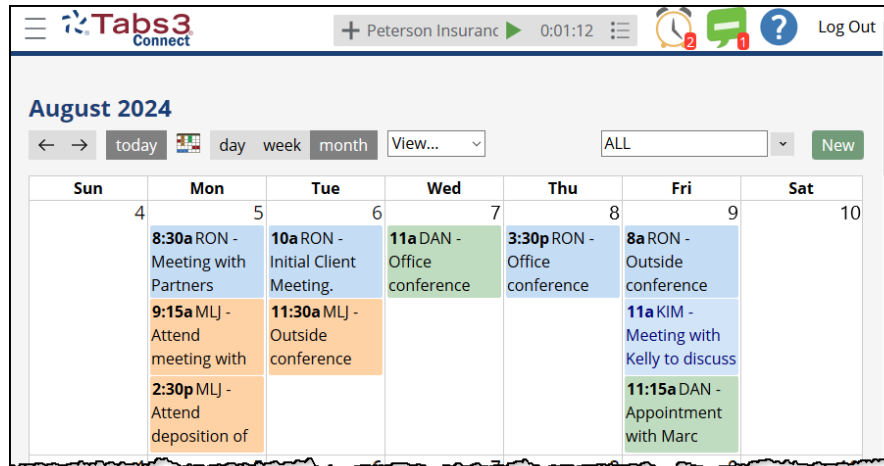
We are willing to stipulate that scaffolding provided was inadequate for the situation, however we are not willing to stipulate to anything that indicates that our client was in any way violating any code with the

Like documents, email attachments that have been journaled can be downloaded.



- 6 -


## More Files

The Tabs3 Connect Matter Manager also allows you to view additional client information by displaying Client Related and Area of Practice files. To view these files, tap the **More Files** button at the bottom of the Matter Manager. The list of available files will depend on the selected matter. An example is shown in the figure to the right.



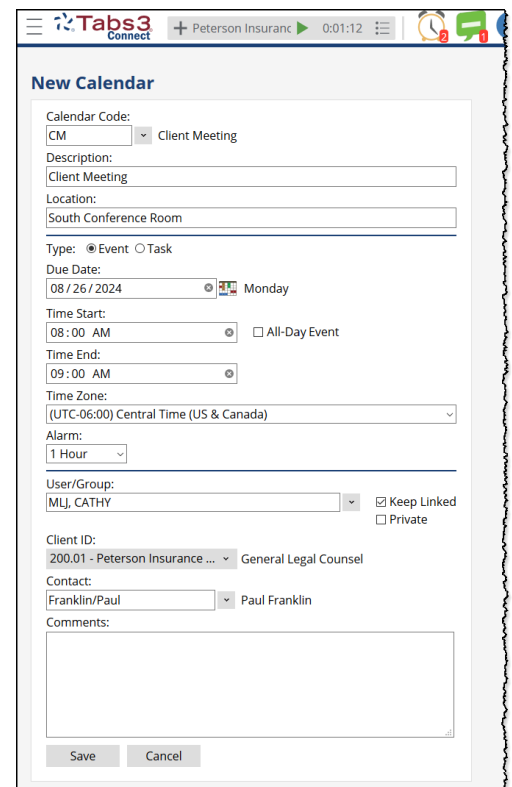
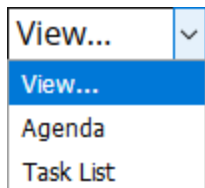
## Viewing the Calendar

Tabs3 Connect offers a firm-wide calendar, even when you are away from the firm. To view the calendar, tap the  icon on the Home page or at the top of the page within Tabs3 Connect. The calendar can be toggled between viewing entries for a day, week, or month. You can also quickly switch to the Agenda or Task List. The monthly calendar is demonstrated in the figure to the right. To change the date selected, tap the  icon.

Changing which users' events are being viewed on the calendar is easy! Simply tap the  button and choose from the list of users.

Colors used for individual users or records match the colors in PracticeMaster. The Calendar Properties window in PracticeMaster allows you to select whether to display colors based on User ID information or Calendar Code information.

Tap the **New** button to add a new calendar entry as shown to the right. Once saved, the calendar entry will be immediately available in PracticeMaster back at the office.



Tap the **View** selector to change between **Calendar** view, **Agenda** view, and the **Task List**.


Tap **Agenda** to display an agenda with events for a selected user or all users. The **Agenda** page on the **Phone Layout** is shown to the immediate right.



Tap **Task List** to display a list of tasks for a selected user or all users.

08/26/2024 - Monday	
Meeting with Kelly to sign Will 850.01 Kelly Ann White - Last Will & Testament	01:30 PM KENDRA
Appointment with Robert Maxwell.	02:15 PM DAN
08/27/2024 - Tuesday	
Meeting with Health USA. 200.02 Peterson Insurance Co. - Maintenance of Insurance Policies	08:00 AM CHERYL, MJ
Appointment with Harry Jones. Potential new client.	09:30 AM MJ
Office conference with Mark, RE: file. 121.01 Marcus Phillips - Real Estate Acquisition	09:45 AM JASON
Meeting with Ben Howard Potential Client	10:00 AM JEN
Meeting with Robert Maxwell.	10:15 AM MJ
Meeting with Shelly McGuire Shelly McGuire	12:15 PM JEN
Appointment with Marcus Phillips. 121.01 Marcus Phillips - Real Estate Acquisition	01:00 PM JEN
Consultation with Paul regarding insurance policies. 200.02 Peterson Insurance Co. - Maintenance of Insurance Policies	02:00 PM CHERYL
Mediation	03:30 PM


## Alarm Notifications

Alarm notifications will be received while logged into Tabs3

Connect. The  icon in the Tabs3 Connect toolbar shows the number of active alarms. Tapping this icon displays the **Alarms** page where you can view the active alarms and snooze or dismiss the alarms by tapping the buttons within each alarm record.

08/26/2024 - Monday	
 Filing Deadline 102.00 Andrew C. Gilbert - Auto Accident	4 hrs, 11 mins
 Appointment with Jim Peterson 200.01 Peterson Insurance Co. - General Legal Counsel	5 hrs, 41 mins

## Accessing the Client File

To access the Client file, tap the  icon on the Home page or at the top of the page within Tabs3 Connect. This will bring you to the **Clients** page. Tap **All** to view a full client list or tap **Recent** to see only clients that you have recently accessed.

**View Client** List

850.00  
[Kelly Ann White](#)  
Divorce

201, 122nd Avenue East  
Los Angeles CA 98507


[Kelly Ann White](#)

213-474-4336 Business  
323-489-3410 Home  
[kelly.white.la@hushmail.com](mailto:kelly.white.la@hushmail.com)

Misc Description... White vs. White  
Misc Description... \*Uncontested  
Misc Description...

**All Fields**

Clients		Recent	All	Search
1.00 - Administrative Account For tracking all Firm and interest adjustme...				
100.00 - Michael Larson Larson v. Bel-Cor	Michael Larson <a href="mailto:mlarson@larson.com">mlarson@larson.com</a>			
101.00 - John Williams State v. Williams	John Williams <a href="mailto:jw2000@net.com">jw2000@net.com</a>			
102.00 - Andrew C. Gilbert Auto Accident	Andrew C. Gilbert <a href="mailto:gil_man@yahoo.com">gil_man@yahoo.com</a>			
120.01 - Daniel P. Klein Klein vs. Simmons Construction	Daniel P. Klein <a href="mailto:dpklein@gmail.com">dpklein@gmail.com</a>			
121.01 - Marcus Phillips Real Estate Acquisition	Marcus Phillips <a href="mailto:markp@emach.net">markp@emach.net</a>			
200.01 - Peterson Insurance Co. General Legal Counsel	Paul Franklin <a href="mailto:pfranklin@petersoninsurance.com">pfranklin@petersoninsurance.com</a>			
200.02 - Peterson Insurance Co. Maintenance of Insurance Policies	Paul Franklin <a href="mailto:pfranklin@petersoninsurance.com">pfranklin@petersoninsurance.com</a>			


**Tip:** From the **Clients** page, fees can be quickly entered by tapping the  icon to the right of a client's name.

Tapping the client's name will bring you to the **View Client** page. Although Contact information can be edited in Tabs3 Connect, Client information cannot. The most common fields for clients is shown, but you can view additional fields of information, including custom fields added in PracticeMaster, by tapping the **All Fields** button.



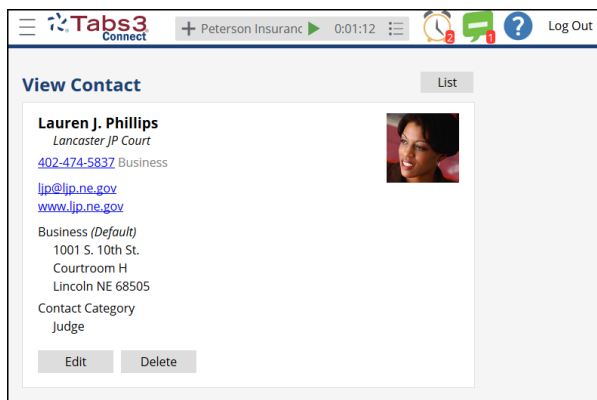
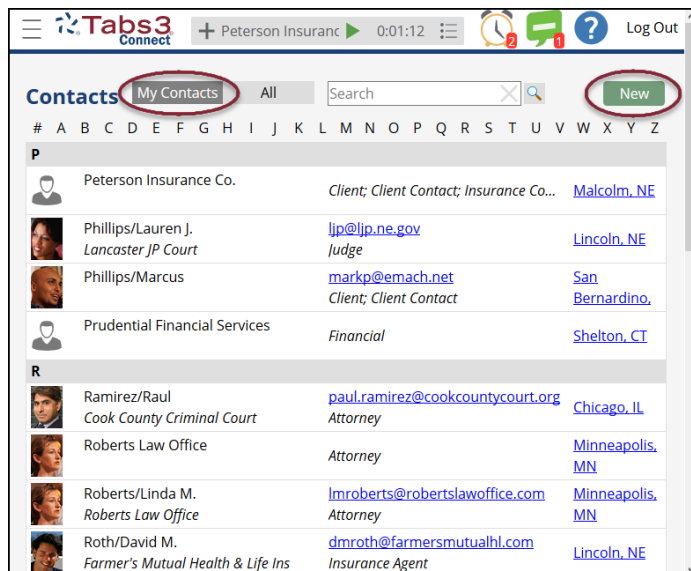
## Managing Contacts

Contacts can be viewed, edited, or even added while using Tabs3

Connect. To view the Contact file, tap the  icon on the **Home** page or at the top of the page within Tabs3 Connect. This will bring you to the **Contacts** page as demonstrated to the right.

The contact list can be toggled between viewing all contacts by tapping **All**, or only viewing the contacts to which your User ID has been assigned by tapping **My Contacts**.

**Tip:** Sorting and filtering the contact list is easy. Simply tap the letter for the last name of the contact you are looking for, or use the **Search** bar to find them quickly.



## Viewing a Contact

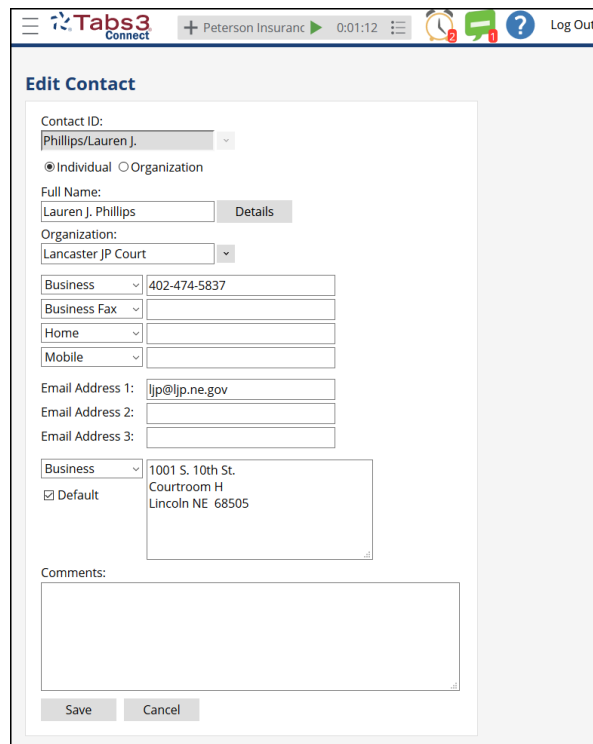
Tap a contact's name to open the **View Contact** page. From the **View Contact** page, you can tap on the contact phone number to dial your phone, or tap the address to launch the map feature on your device. Tap the contact email address to open your device's default email application with a new email addressed to the contact.

## Editing a Contact



To edit a contact, tap the **Edit** button on the View Contact page. This brings you to the **Edit Contact** page as shown in the figure to the right. The Edit Contact page allows you to add or modify any field within the Contact file. These changes will immediately be reflected in Tabs3 Billing and PracticeMaster back at the office.

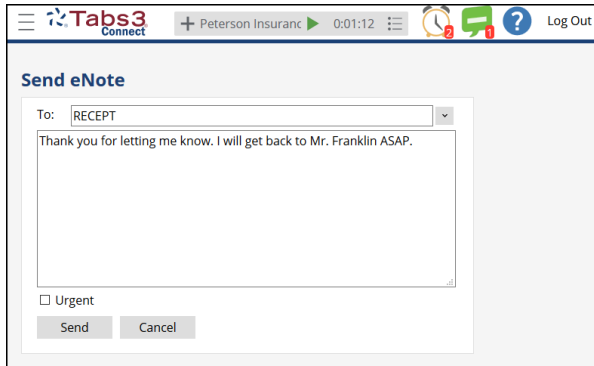
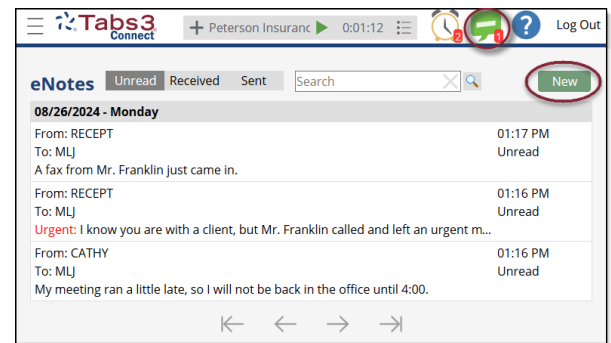
## Adding a New Contact

To add a new contact, tap the **New** button on the **Contacts** page. This will bring you to a **New Contact** page, which looks similar to the **Edit Contact** page. Add the available information for the new contact and tap **Save** to complete the process. The new contact will immediately be reflected in Tabs3 Billing and PracticeMaster back at the office.



## Sending and Receiving eNotes

Tabs3 Connect allows you to send and receive eNotes to other PracticeMaster and Tabs3 Connect users. To open the **eNotes** page, tap the  icon at the top of the page within Tabs3 Connect. This icon will change to  when you have unread eNotes. The number on the icon indicates how many unread eNotes you have.





Tapping the eNotes icon brings you to the eNotes page where you can view your unread, received, and sent eNotes. To read, reply, forward, or dismiss any eNote, simply tap it.

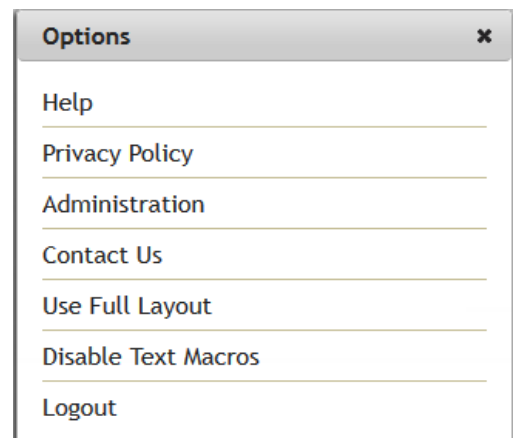
## Tabs3 Connect Options

### Full Layout vs. Phone Layout

Some pages will appear different when using the **Phone Layout** instead of the **Full Layout**. The timer is shown at the bottom of the window in Phone Layout. Also, the graphical calendar and Edit Timer window are not available when Phone Layout is selected. Instead, the calendar defaults to the Agenda and the Edit Times button is not shown. You can switch to the **Full Layout** to see these options by:


1. Tap the  icon in the toolbar at the top of any page.
2. Tap the  icon in the list.
3. Tap the **Use Full Layout** (or **Use Phone Layout**) option to switch your view of Tabs3 Connect.

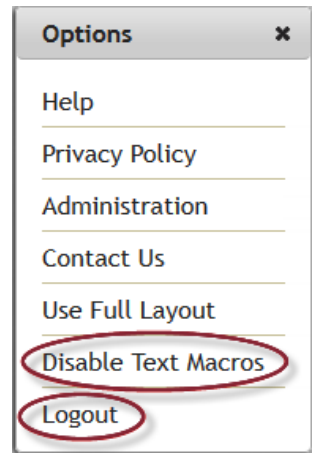
The **Full Layout** view is optimized for a larger display such as a tablet or desktop.




### Text Macros

Text macros that have been added to Tabs3 Billing or PracticeMaster can also be used in Tabs3 Connect. Text macros are available in any Description or Memo type field. This includes the **Description** field in fees and costs, the **Comments** field in calendar and contact records, the message portion of an eNote, and more.

You can optionally disable or enable text macros for the current Tabs3 Connect session by clicking or tapping the  icon and then selecting **Disable Text Macros** or **Enable Text Macros**. Each user's default setting for text macros can be specified in the System Configuration menu by selecting **File | Open | Users | Tabs3 Connect Settings**.



## Logging Out


Remember to log out of Tabs3 Connect once you are finished. You can tap the **Log Out** button in the upper right corner on any page to exit Tabs3 Connect. When in Phone Layout, tap the  icon and then tap **Logout** to exit Tabs3 Connect.

Users will be automatically logged out of Tabs3 Connect after a period of inactivity. The length of time before a user is logged out is determined in the System Configuration my by selecting **Platinum | Tabs3 Connect Administration**.

## Conclusion

Tabs3 Connect provides an easy and safe way of accessing your data while you are away from the office. With the ability to create fees, update your calendar, and access your Tabs3 Billing and PracticeMaster data from anywhere that you can connect to the Internet, Tabs3 Connect helps you stay on top of tracking and entering your billable time. To get started, log in at [www.Tabs3Connect.com](http://www.Tabs3Connect.com) now!

For more information on Tabs3 Connect:

- Read our [Platinum Setup Guide](#) and [Platinum Server Guide](#) at [Tabs3.com/docs](http://Tabs3.com/docs).
- Read our online Knowledge Base Article [R11480](#), "All About Tabs3 Connect," at [support.Tabs3.com](http://support.Tabs3.com).
- Access the Tabs3 Connect Help topics (Tap the  icon and then tap Help).
- Contact your Tabs3 Software consultant.
- Call Tabs3 Support, available 8am to 5pm (Central Time), Monday through Friday, (402) 419-2210.
- Email Tabs3 Support at [Tabs3.com/support](mailto:Tabs3.com/support).