

# PracticeMaster Quick Clicks Quick Guide



Tabs3 Billing



PracticeMaster



Trust Accounting



Accounts Payable




General Ledger

## **PracticeMaster Quick Clicks Quick Guide**

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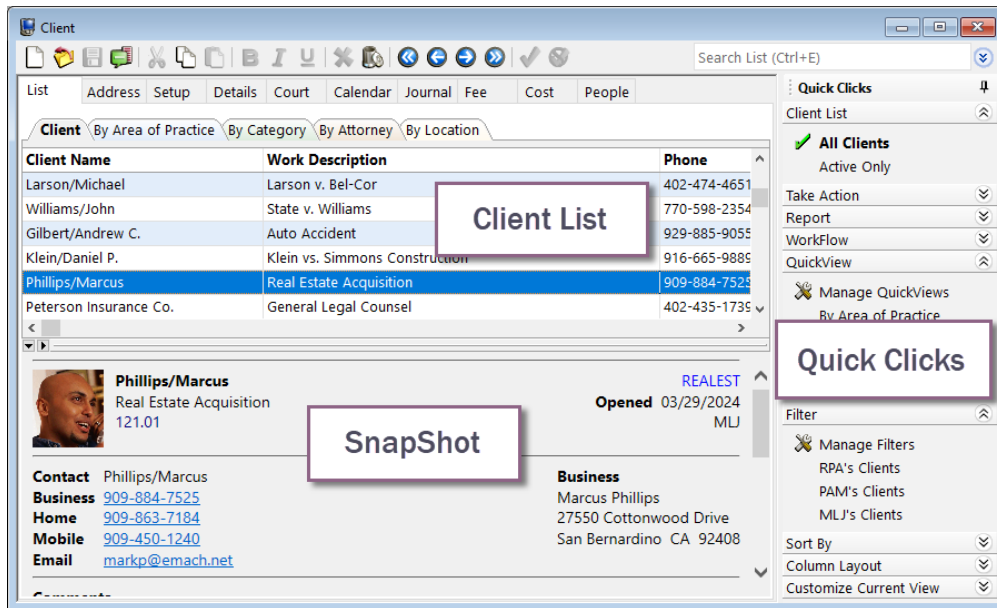
Version 2024 (Tuesday, July 16, 2024)

# Quick Guide to PracticeMaster Quick Clicks

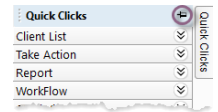
The PracticeMaster Quick Clicks pane provides an easy way to navigate and organize data files in PracticeMaster. This guide will provide you with all the information you need to make use of the features and filters in the Quick Clicks pane.




## Getting Started

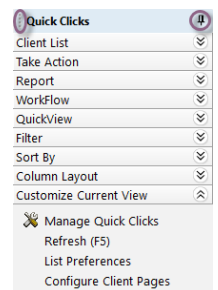
The Quick Clicks pane of each file provides single-click access to a variety of features that will help you navigate your data files. Many of your common activities can be made easier with the use of Quick Clicks pane features. For example, if you want to view only your own open clients, you can set up a filter in the **Filter** group of the Quick Clicks pane in the Client file.





The Quick Clicks pane is available in all PracticeMaster data files and the Matter Manager, although its functionality differs from file to file. The figure above shows the default view of the PracticeMaster Client file. The top-left pane displays the List window of the Client file. The bottom-left pane displays the Snapshot window. The right pane displays the Quick Clicks pane for the Client file.






The Quick Clicks pane can be docked on the right or left side of a file window by clicking and holding the  area (gripper), and then dragging it into the desired position. The  (pin) in the top-right corner of the Quick Clicks pane allows you to set the pane as a static feature of the file window, or hide the pane as a **Quick Clicks**  button when it is not in use. By default, the Quick Clicks pane is "unpinned". We recommend clicking the pin to make the pane a static feature so that you can easily access all of the features of the Quick Clicks pane.

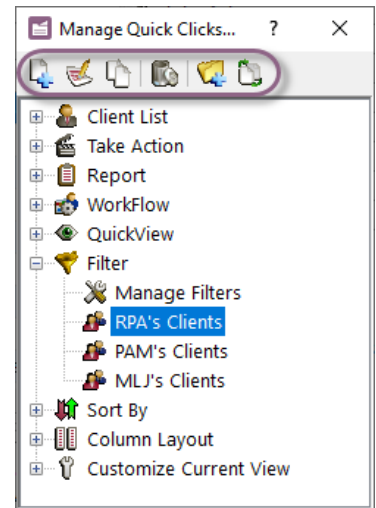


## Organizing Quick Clicks

The individual groups of the Quick Clicks pane can be displayed using the  button or hidden using the  button on each group's title bar. You can customize the Quick Clicks pane via the Manage Quick Clicks window.

The Manage Quick Clicks window is accessed by clicking **Manage WorkFlows**, **Manage QuickViews**, **Manage Filters**, and **Manage Column Layouts** in their associated group; or by clicking **Manage Quick Clicks**, located in the **Customize Current View** group. Each of these options is preceded by the  (Manage) icon.

Opening the Manage Quick Clicks window displays all Quick Clicks groups. Click the  or  icons to expand and collapse groups, then use the toolbar to add, copy, edit, and delete options. You can add folders to help organize like items, then drag and drop groups and items to change the order. You can also hide groups, folders, or individual items you don't want to see in the Quick Clicks pane, or unhide them if you change your mind.



## List Window View Options in the Quick Clicks Pane

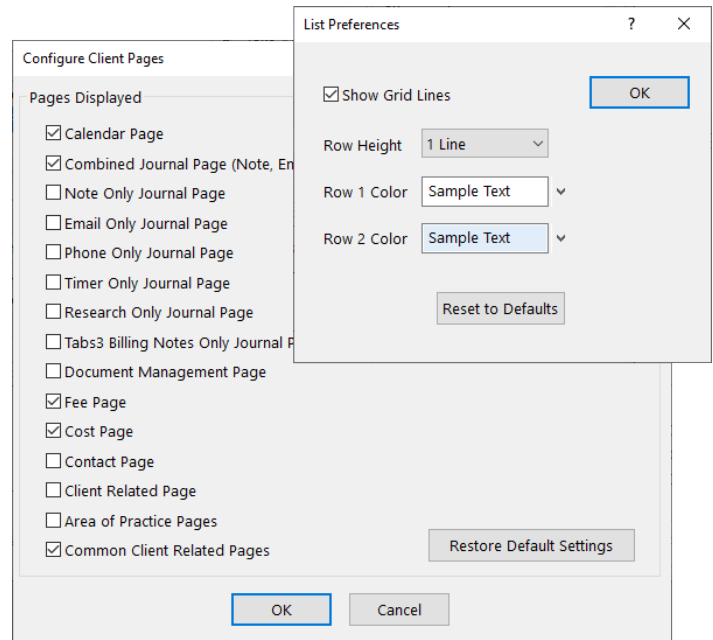
Quick Clicks can be used in a variety of ways to customize the List window, depending on the file in which they are used. The **Customize Current View** group of the Quick Clicks pane can be used to alter which tabs are displayed in a file and how they are displayed. For example, in the Client file you can use the **Configure Client Pages** option to determine which tabs are displayed in the Client file. Likewise, the **Column Layout** group can be used to customize the columns displayed when a file is opened.

### Using Customize Current View

The **Customize Current View** group of the Quick Clicks pane offers two unique functions that can be used to personalize the List window of any PracticeMaster data file.

In the Client and Contact files, click the **Configure Client/Contact Pages** option to display the Configure Client/Contact Pages window. This window provides the option to select which pages are displayed in the Client or Contact file (the options for the Contact file are shown to the right). All selected check boxes will be displayed as tabs in the associated file, while tabs for the cleared check boxes will be hidden.

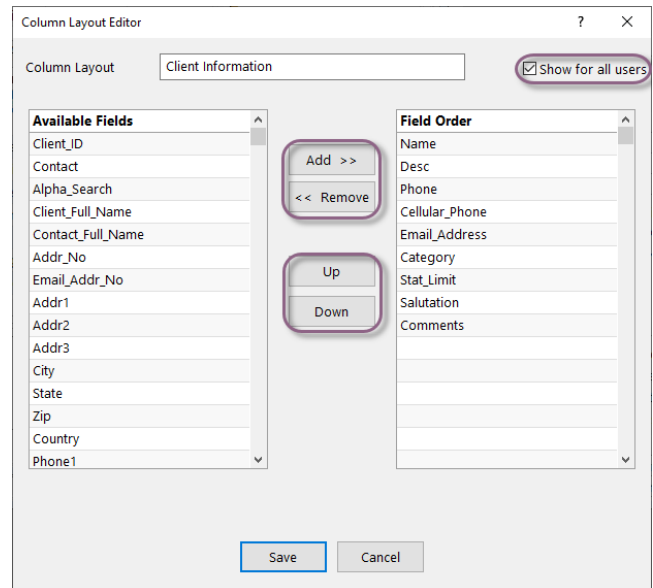
In any PracticeMaster file, click the **List Preferences** option to display the List Preferences window. In this window, select the **Show Grid Lines** check box to display grid lines between each line in the List window of the file. Then, select how many lines will display for each row. This provides the opportunity to display more information per record than the default single row, or to simply double-space records in a file. Finally, select contrasting colors as the **Row 1 Color** and **Row 2 Color** fields to optimize viewing ease.




## Altering the Column Layout

The **Column Layout** group of the Quick Clicks pane can be used to organize the **List** window of each file, making skimming for the right record more efficient. By editing the column layout, you can choose which fields are displayed upon opening a file, and then use these columns to sort by a specific field. The fields included in the column layout are also the fields that will be copied if you select records in the list to copy into third party software. Many firms will define multiple column layouts for the frequently accessed files, such as Client and Contact. Additionally, you can select whether all users have access to this column layout, or just you.

To add a new, or edit an existing column layout for the current file, click **Manage Column Layouts** in the Quick Clicks Pane. This will open the Manage Quick Clicks window.



### ► To create a new column layout

1. In the Manage Quick Clicks window, click the  icon or press Ctrl+N.
2. Enter a short name to describe the new column layout. This name will be displayed as an option in the **Column Layout** group of the Quick Clicks pane.
3. In the **Available Fields** column, select a field, such as **Contact**.
4. Click the **Add** button to add the field to the **Field Order** column.
5. Do this for each field that you want to display in the new column layout.
6. In the **Field Order** column, select fields individually and click the **Up** and **Down** buttons to change the order in which the fields will be displayed in the **List** window of the current file.
7. Select the **Show for all users** check box if you want all users to have access to this column layout, or clear the check box if you do not want other users to have access to the column layout.
8. Click **Save**, and then close the Manage Quick Clicks window.

To edit an existing column layout, select the desired column layout in the Manage Quick Clicks window and press the Enter key. To create a new column layout based on an existing one, select the desired column layout and press Ctrl+C. You can then edit the new layout.

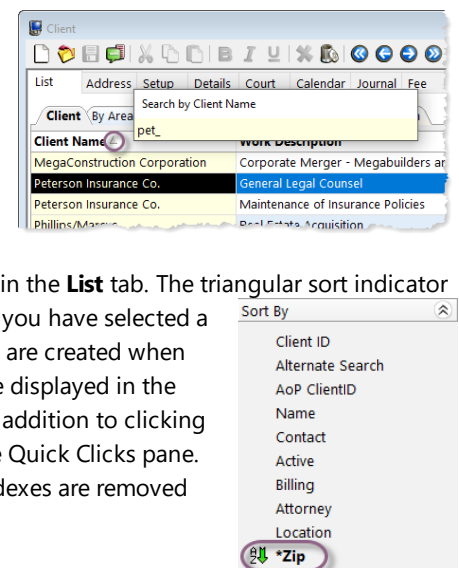
## Working with Indexes and Filters

The Quick Clicks pane can be used to access indexes and create filters. These features provide a unique way to organize and search information in each file.

### Using Indexes for Quick Sorting

An index controls the order in which records are displayed in the **List** tabs of their respective data files. A temporary index can be applied by clicking on the column header of any column in the **List** tab. The triangular sort indicator (shown above) will be displayed, denoting whether the sort is ascending or descending. After you have selected a column, the **Sort By** group of the Quick Clicks pane will display the index used. Some indexes are created when you click the column header, and are called "temporary" indexes. These temporary indexes are displayed in the Quick Clicks pane using the column name, preceded by an asterisk (\*) (shown to the right). In addition to clicking the column header, you can reapply indexes by selecting an index in the **Sort By** group of the Quick Clicks pane. Temporary indexes only apply while the file is open. When the file is closed, any temporary indexes are removed from the **Sort By** group.

Once an index is applied, begin typing. An Incremental Search (i.e., Search by [index]) window will be displayed (shown above), which searches the selected column for the first record that matches the characters entered. For



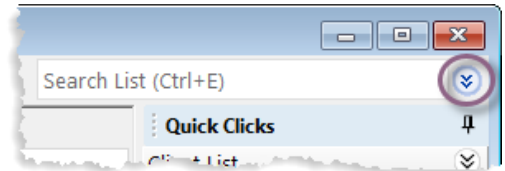
example, if the **Client Name** column is selected, the window will be titled "Search by Client Name" and the **Client Name** column will be searched for the first match to the characters entered.

A permanent index can be created using File Maintenance. Once created, permanent indexes are always displayed, and are shown in the **Sort By** group above any temporary indexes. These indexes are retained when the file is closed, and can make sorting faster. Take the time to set up permanent indexes for those sort orders you use frequently. Another way to search for specific records involves the use of filters.

## Introduction to Filtering

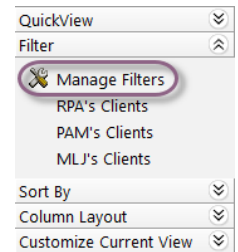
Filters make it easier to find the specific records you are looking for by displaying only those records that meet the criteria you enter, such as records created for a certain timekeeper or by a specific User ID. There are three different ways to use filters; you can use the Search box, a pre-existing filter (e.g., the **Contact Category** option in the Contact file), or an Expression filter.

The Search box can be used to quickly search for all records that contain a specific string of text in any of the fields included in the currently selected column layout. The Search box is located on the right-hand side of the window, above the Quick Clicks pane. Enter up to 50 characters into the Search box to search all fields, or click the drop-down arrow to drop down to search in specific fields.



Using the pre-existing Contact Category filter allows you to search for contacts who are assigned to certain Contact Categories. For example, suppose an insurance adjuster is working on a claim for one of your clients, but you cannot remember the adjuster's name. In the **Filter** group of the Quick Clicks pane select **Contact Category**, and then select **Insurance Adjuster** in the Contact Categories window. PracticeMaster will search the Contact file for all records with "Insurance Adjuster" selected as the Contact Category field, and display only those records.

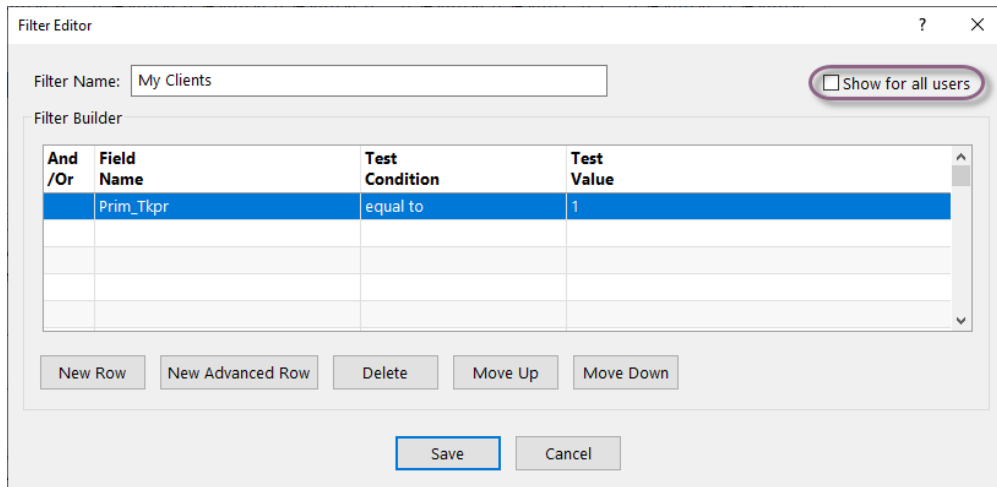
Alternatively, use the powerful Filter Editor to create an Expression filter and gain more control over the search parameters. Expression filtering can be useful when searching for records that meet one or more conditions beyond simple text searching. Unlike the List Text filter, PracticeMaster uses the Expression filter to search records based on specified field values. To begin, select **Manage Filters** from the **Filter** group of the Quick Clicks pane. This will open the Manage Quick Clicks window. From here, you can either build an expression based on virtually any combination of field values, or you can enter a logic statement yourself.



Let's add a simple filter to display records in the Client file for Timekeeper 1.

### ► To build an expression filter

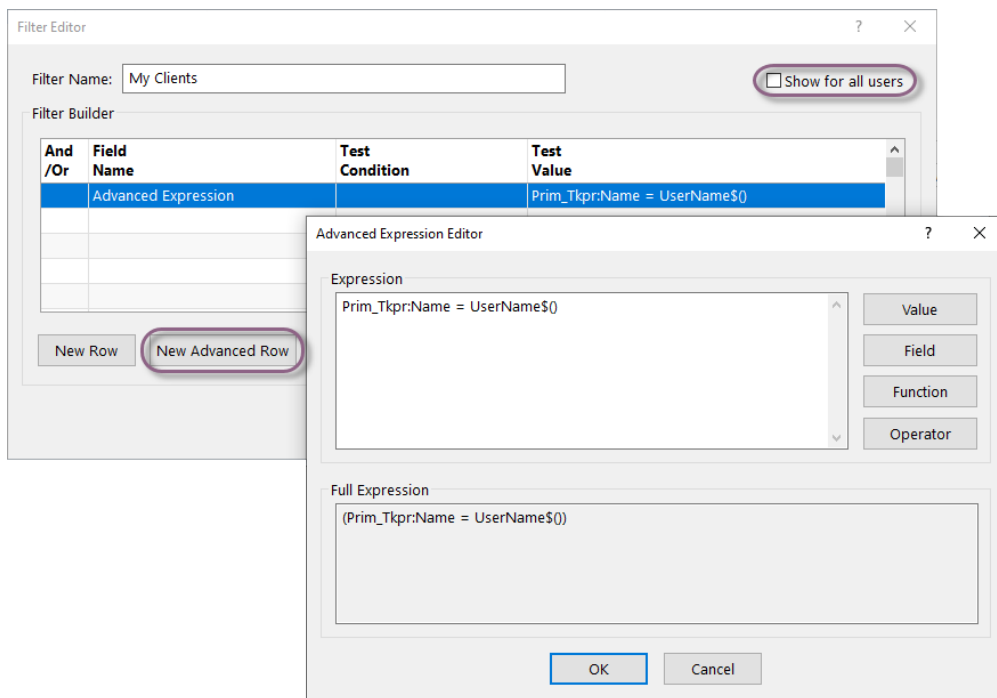
1. In the Manage Quick Clicks window, press Ctrl+N to open the Filter Editor.
2. Enter a title in the **Filter Name** field. Make sure you use an easy to understand description, because it will be shown in the list of filters in the Quick Clicks pane.
3. Click in the **Field Name** field and select **Prim\_Tkpr**.
4. Click the **Select** button.
5. **Test Condition** defaults to **equal to**.
6. Click in the **Test Value** field and enter "1".
7. Click the **Save** button to save the new filter.



Alternatively, if you know the expression you want to use, you can use the Advanced Expression Editor to enter the expression directly.

► **To enter an expression**

1. From the Filter Editor, click **New Advanced Row**.
2. In the **Expression** field, enter a logic statement. Using our previous example, let's enter "Prim\_Tkpr = 1".
3. Click the **OK** button.
4. Click the **Save** button to save the new filter.



Additionally, you can select whether all users have access to this column layout, or just you. From the Filter Editor, simply select the **Show for all users** check box if you want all users to have access to this filter, or clear the check box if you do not want other users to have access to the filter.

Once an expression has been created, it is saved and can be used from then on. There is no limit to the number of expressions that can be created. Making use of Quick Clicks filters can be an easy way to sift through what might otherwise be a thick file in a filing cabinet. Additional information and procedures regarding how to create and use filters and indexes in PracticeMaster can be found in Knowledge Base Article [R11487](#), "Working with Indexes and Filters in PracticeMaster" ([support.Tabs3.com](http://support.Tabs3.com)). If you need more help, call our Tabs3 Support Department (402) 419-2210. We will be happy to help you.

## QuickViews and Smart Tabs

The Quick Clicks pane can be used to access QuickViews. QuickViews save a column layout, filter, and index to provide individual views of your data that is easy to switch between. This is a powerful way of organizing and finding information in PracticeMaster using the **List** tab.

### Using QuickViews


QuickViews combine a filter, column layout, and sort option into a tab at the top of the **List** tab. When you change from one QuickView to another, you quickly change which records you see, the columns that are displayed, and the order in which records appear.

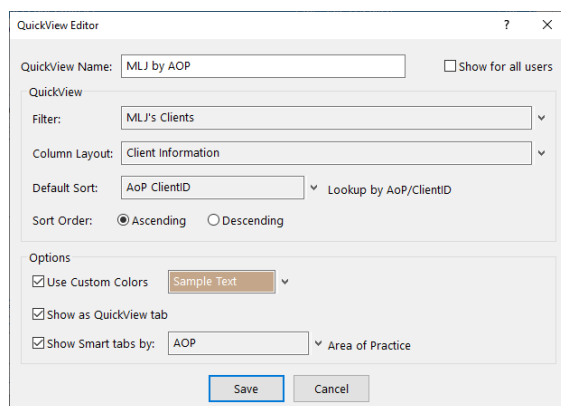
QuickViews also include Smart tabs at the bottom of the **List** tab to further sort records into groups based on the selected indexed field. You can

customize the colors used for QuickViews and Smart tabs. You can share QuickViews for all users as needed, or define them for yourself. Once created, you can select a QuickView at the top of the List tab, or via the Quick Clicks pane.

To add a new, or edit an existing QuickView for the current file, click **Manage QuickViews** in the Quick Clicks Pane. This will open the Manage Quick Clicks window.

#### ► To create a new QuickView:

1. In the Manage Quick Clicks window, click the  icon or press Ctrl+N.
2. Enter the **QuickView Name** by typing over the "New QuickView" text shown.
3. Select a **Filter**, **Column Layout**, **Default Sort**, and any other desired options for this QuickView.
4. Click **Save** to save the QuickView.
5. Close the Manage Quick Clicks window.



QuickView Editor

QuickView Name: MLJ by AOP  Show for all users

QuickView

Filter: MLJ's Clients

Column Layout: Client Information

Default Sort: AOP ClientID  Look up by AoP/ClientID

Sort Order:  Ascending  Descending

Options

Use Custom Colors

Show as QuickView tab

Show Smart tabs by: AOP

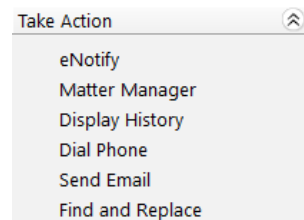
Save Cancel

## Actions in the Quick Clicks Pane

The **Take Action** group in the Quick Clicks pane of each file is unique, yet each file shares a few common functions. These common functions include: Display History, Dial Phone, Send Email, Find and Replace, and eNotify.

### Display History

When any PracticeMaster record is selected, click the Display History option to view changes made to the record. Any changes to the field will be displayed, provided History Tracking is enabled in PracticeMaster Customization and for the selected field in File Maintenance.



Take Action

- eNotify
- Matter Manager
- Display History
- Dial Phone
- Send Email
- Find and Replace



## Dial Phone

The **Dial Phone** option can be used to automatically dial any phone number in a **Phone Number** field or any other phone number and/or start a timer record. All 19 client/contact phone numbers are available.

## Send Email

The Send Email option can be used to create a new email message using your default email software, such as Microsoft Outlook. Using the Outlook Plug-in in conjunction with the **Send Email** option allows you to save a copy of the email and optional attachments as an email record in the Journal file and link the email record to a client and/or contact. These email messages can also be linked to calendar and fee records using the Outlook Plug-in. The ability to track all client and contact email in a central repository, regardless of which employee sends or receives it, is a powerful feature of PracticeMaster.

## Find and Replace

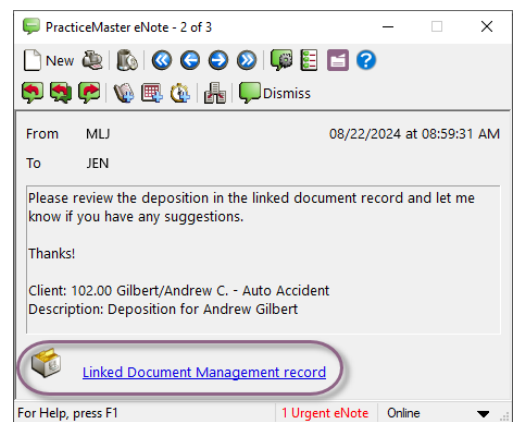
The Find and Replace window can be used to find one or more records in a file containing the specified text, and optionally replace this text with alternative text. This window can also be used to quickly find records as an alternative to using the incremental search.

## eNotify

When using the Platinum edition of the software, selecting any PracticeMaster record and clicking the **eNotify** option will open a new Send eNote window. The Send eNote window will automatically insert a link to the record you are viewing. The new eNote will also automatically contain information based on the record from which it was created. This feature provides a simple way to notify co-workers of additions or changes to their PracticeMaster records. The **eNotify** option is a PracticeMaster Platinum feature.

## Additional Actions

Unique options are also available via the Client file, including the Client Calendar, Word Document Assembly, and HotDocs Document Assembly. The Contact file offers a Create Client feature, allowing you to quickly create a new client based on an existing contact. The Journal file allows you to Change Client ID, Convert to Fee, Load Fee Record, Reply, Reply to All, and Forward. Additional features are available in other PracticeMaster files, and all are described in detail in the PracticeMaster Help.



## Reports in the Quick Clicks Pane

Similar to the **Take Action** group, the **Report** group in the Quick Clicks pane of each file is unique, yet each file shares a common report – Print Record.

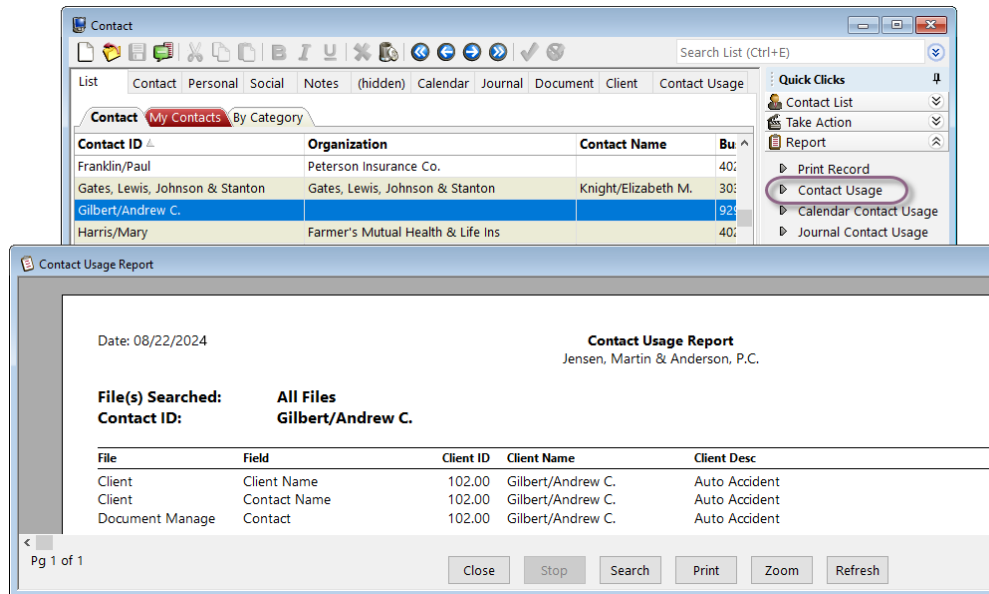
## Print Record

When a PracticeMaster record is selected, clicking the **Print Record** option will print a report that displays the value for each field included in the selected record. This is a fast and easy way to print a copy of any PracticeMaster record.

## Usage Reports

Usage Reports are a powerful feature in PracticeMaster that let you quickly see all references in the PracticeMaster data files to a specific record in a lookup file. This concept is sometimes referred to as a reverse lookup. For example, you can run a Contact Usage Report for a specific contact in the Contact file to quickly see all cross references to that contact.

Usage reports are available for all lookup files. A special Contact Usage Report can be run from the Client file that will list all contacts used for a specific client. You can run a Usage Report for a particular timekeeper and see all cross references to that timekeeper.



## Fee-Related Reports

In the Fee file, and in the Client file on the **Fee** tab, you can run the Timer Fee Report. This report includes the highlighted fee record(s), and indicates if the fee record(s) were not created from Journal tasks or displays information regarding the journal task used to create the fee record(s). You can mouse over individual records and with a click of the mouse immediately display the field and individual record.

## Conclusion

The PracticeMaster Quick Clicks pane provides an easy way to navigate and organize data files in PracticeMaster. The Quick Clicks pane of each file provides single-click access to a variety of actions and options that will help you navigate your data files. Taking the time to explore the capabilities provided by Quick Clicks can save you time and help you find the information you need quickly.