VERSION 16 CD INSTALLATION INSTRUCTIONS

Tabs3 & PracticeMaster Products Included on CD

These installation instructions are for the following software products on the CD:

- System Configuration
- PracticeMaster
- PracticeMaster Briefcase
- Tabs3 Taskbill Software

- Tabs3 Billing Software
- Tabs3 Billing Custom Report Writer
- Tabs3 Remote Entry Software
- Platinum Server & Platinum SQL Server

- Tabs3 Trust Accounting Software (TAS)
- Tabs3 Accounts Payable Software (APS)
- Tabs3 General Ledger Software (GLS)
- Tabs3 General Ledger Custom Report Writer

Customer Service is Important

We understand that customer support is an important part of customer satisfaction. When you purchase a Tabs3 or PracticeMaster software license, you have our assurance of customer service and product support. Product support plays a key role in our customer service philosophy. Our Technical Support staff is dedicated to helping you get the most from the software by answering technical questions about the product and how it works.

If you have a question or problem concerning the software, we recommend these steps:

1. Check the product documentation including the Help provided with the software. Often, you'll find the answer to a question there.

2. Refer to our Knowledge Base on the Internet. Our Knowledge Base contains extensive information on Error Troubleshooting, Networking & Windows Issues, "How To" Articles and Product-Related Articles. Our Knowledge Base can be launched from the ***Help | Internet Resources | Knowledge Base*** menu options in the software or found at:
     www.support.Tabs3.com

3. Consult the reseller from whom you purchased the software license. If you can't find the answer in the product documentation, your reseller may be able to assist you.

4. Call our Technical Support Department at (402) 419-2210. Before you make the call, gather all information pertaining to the problem. We will need to know the serial number of the software, which can be found via the ***Help | About*** menus in the software.

General Installation Information

The CD is used to install all Tabs3 and PracticeMaster software products. It contains trial versions for all products as well as full working versions for the software licenses that have been purchased.

Tabs3 & PracticeMaster Applications	A single consolidated installation menu option is available for all of the Tabs3 and PracticeMaster software products *(with a few exceptions as noted in the following)*. A checklist of these software products is shown allowing you to select which products you want installed. All products are shown on the checklist when you are installing trial versions. However, when installing full working versions, the checklist will include only the purchased products.
System Configuration	System Configuration is used to configure users, passwords, groups, access profiles, and firm information. The System Configuration software is automatically selected when you select any software product that requires System Configuration.
Platinum Server	The Platinum Server software is used with the Platinum version of the Tabs3 and PracticeMaster software. The Platinum Server is included on this CD and will be installed automatically when installing the software.
Network Workstation Setup	When running a multi-user version, once the software is installed on a file server, installation for additional network workstations is handled by a separate SETUP process *(as discussed in the **Network Workstation Setup** section on page 3).*

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Tabs3 Remote   Tabs3 Remote has a separate installation option. Tabs3 Remote must be installed on each computer where Tabs3 Remote will be used. Tabs3 Remote does not require System Configuration.

PracticeMaster Briefcase   PracticeMaster Briefcase has a separate installation option. PracticeMaster Briefcase must be installed on each computer where PracticeMaster Briefcase will be used. PracticeMaster Briefcase does not require System Configuration.

Platinum & Platinum SQL Installations

This CD includes all of the necessary software for Platinum version installations including Platinum Server.

- 🖥 **Platinum Installation Instructions**: Additional instructions for *new* Platinum version installations are provided in the Platinum Server manual beginning in Chapter 2. The Platinum Server manual is installed with the Platinum software and can also be accessed via our Knowledge Base Article R11406, "Tabs3 and PracticeMaster Platinum/Platinum SQL Resources." A separate manual for Platinum SQL is installed with the Platinum software and can also be accessed via our Knowledge Base Article R11452, "Platinum SQL Guide." Please review this information after installing the software for additional configuration information. If you are *updating* or *converting* an existing Platinum version installation, separate instructions are included with your shipment.
- 🖥 **Exchange Connector Installation Instructions**: Instructions for installing the Exchange Connector are provided in Knowledge Base Article R11427, "Configuring the PracticeMaster Platinum Exchange Connector."
- 🖥 **Tabs3 Connect Installation Instructions**: Instructions for installing Tabs3 Connect, the Web-based application for Tabs3 and PracticeMaster Platinum users, can be found in Knowledge Base Article R11480, "All About Tabs3 Connect."

Windows 7 & Vista Installations

Tabs3 and PracticeMaster will run under Windows 7 and Vista SP1 or later. When running under Windows 7 or Vista as a stand-alone system or as a Windows 7 or Vista workstation that connects to a Microsoft Windows Server 2008/2003 (either 32-bit or 64-bit) or Windows XP Professional, all functions can be run with UAC enabled. Additional information regarding Vista is provided in Knowledge Base Article R11238, "How Windows 7 and Vista Affect Tabs3 and PracticeMaster Software."

Starter Data Sets for Tabs3, PracticeMaster, & GLS

During the installation process for Tabs3, PracticeMaster, and GLS, you will be asked if you want to install a starter set of data. Starter Data Sets simplify the initial setup process by predefining information in various setup files such as transaction codes, categories, text macros, etc. If you select this option, a partial set of data files will be installed. ***If any of the data files being installed are already present, the corresponding starter data files will not be installed.*** These files may be modified as desired.

Tabs3 Starter Data   The Tabs3 Starter Data Set consists of the following files: transaction codes, categories, billing frequencies, statement templates, e-mail templates, text macros, task based billing codes, timekeeper levels, task code set names, cost type descriptions, statement notes, and statement designer layouts. The Sample Reports section of the Tabs3 manual includes printouts of these files.

Note: The task based billing codes, task code set names, timekeeper levels, and cost types are installed even if you elect not to install the Starter Data Set *(unless the files already exist in either Tabs3 or PracticeMaster)*.

PracticeMaster Starter Data   The PracticeMaster Starter Data Set consists of the following files: transaction codes, calendar codes, categories, text macros, and task based billing codes. The Sample Reports section of the PracticeMaster manual includes printouts of these files. The PracticeMaster Starter Data set also

	includes predefined Report Writer report definitions. Area of Practice Templates are not included in the Starter Data.
GLS Starter Data	The GLS Starter Data Set consists of the following files: chart of accounts, journal names, and departments. The Sample Reports section of the GLS manual includes printouts of these files.

Note: *If data for the product being installed already exists, you will not be given the option to install starter data.*

Note: If installing PracticeMaster over an existing Tabs3 installation, the mirrored data files will not be installed (i.e., categories, transaction code, text macros, task based billing codes). However, calendar codes and PracticeMaster Report Writer report definitions will be installed.

Installing the Software

Note: If the software will be used on a network, read *Using the Software on a Network* found on page 4 of these instructions *before* installing the software.

Note: You must have Administrator privileges when installing the software.

Platinum Note: If installing the Platinum version of the software, the software *must* be installed from the server itself.

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

The software is provided on a CD and must be installed to a hard disk.

▶ **To install the software on your hard disk**

1. Insert the CD into your CD drive.

2. A CD Browser program will automatically start.

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

3. Follow the on-screen instructions to install the selected software.

Network Workstation Setup

Once the Tabs3 and PracticeMaster software has been installed on the file server, each workstation that will be using the software must run the **SETUP.EXE** program file located on the file server. The SETUP.EXE program on the file server is the workstation installation program. This program installs program files, help files, and desktop shortcuts onto the workstation.

Note: When running **SETUP.EXE**, you must have Administrator privileges.

▶ **To install the software on a workstation**

1. Make sure the software is installed on the file server before running the **SETUP** program for workstations.

2. From the workstation, click the **Start** button, and then click **Run**.

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3. Click the **Browse** button and select the directory where the program files were installed. Then, select the **SETUP.EXE** file found in the program file directory on the server and click **OK** to run the program.

4. Follow the on-screen instructions to run the **SETUP** program.

5. Repeat steps 2 through 4 for each workstation that will be using the software.

Note: When running SETUP.EXE, the program will automatically change the rights in the specified local program directory to full read/write rights for all users. The SETUP.EXE does not change rights on the server.

Terminal Services/Citrix Note: The SETUP.EXE file will only need to be run once by a Terminal Services computer, no matter how many users log onto the workstation remotely. The following will need to be performed for each Terminal Services computer. Before running SETUP.EXE, delete any shortcuts to the Tabs3 and PracticeMaster programs for each user on the workstation. Once SETUP.EXE is complete, a single set of desktop shortcuts will have been created. These desktop shortcuts will need to be copied to all other users' Desktop directory, which for Terminal Services in Windows XP is C:\Documents and Settings\<userID>\Desktop, whereas in Vista is C:\users\<userID>\Desktop. *(Note: Locations may be different for Citrix)*. Once the shortcuts have been copied to all other users' desktops, delete the shortcuts from the All Users directory (otherwise users will have two sets of shortcuts). Once users have their own shortcuts, they are free to add startup options as desired. Later, when the Tabs3 and PracticeMaster programs are updated on the server from the Web, an Administrator must open any Tabs3 or PracticeMaster program on the Terminal Server to update the program files on the Terminal Services computer. It is not necessary to run SETUP.EXE again, because the local program files will automatically update when the software is started.

Using the Software on a Network

1. Before using the software, you must assign each user the proper rights and access privileges for the program and data directories.

    - When installing the software, you must have Administrator privileges.
    - When running the SETUP.EXE program for each workstation, you must have Administrator privileges.
    - All users must have *all rights* to the program and data directories.
    - Tabs3 and PracticeMaster software does not support Offline Files. Do not enable Offline Files for the data directory. Details regarding Offline Files can be found in our Knowledge Base on the Internet in Article R11450 - "Offline Files Not Supported in Tabs3 & PracticeMaster Software."
    - Required settings are written to the Windows registry for various PracticeMaster Plug-in features. Therefore, in order to successfully use these features, the feature must be installed by a user who has administrator credentials. If you are running the software without these credentials, you will be asked to enter them at the time they are required. These features include: Outlook Plug-In for e-mail integration, Internet Explorer Plug-in, Word Plug-in, Excel Plug-in, Adobe Plug-in, WordPerfect Plug-in, HotDocs Document Assembly Plug-in, and Word Document Assembly Plug-in. Once the Windows registry has been appropriately modified when an administrator starts or installs the Plug-in, it is no longer necessary for the user to have Administrator rights.

    Note: Details regarding the above requirements can be found in our Knowledge Base on the Internet in Article R11434 - "User Rights Needed to Install and Use Tabs3 and PracticeMaster Software" at *support.Tabs3.com*.

2. When using the software on a network, all program and data files must reside on the file server. Workstations run the program files installed on their computer in a local program directory, but access the data files on the server. Only one set of data files exists for the software *(i.e., each workstation does not have a separate set of data files)*. The directory in which the data files reside is referred to as the Current Working Directory. All data files reside on the server in the same directory as the program files with the following exceptions:

    PracticeMaster Files: PracticeMaster data files are stored in the CMSYSTEM directory under the Current Working Directory. Each Area of Practice has its own directory under the Current Working Directory.

    GLS Data Files: Because multiple GLS sets of books can be maintained in GLS, a data path can be specified for each set of books (i.e., GLS client). We recommend configuring the data path as blank for the main GLS client. This is done using the **Edit GLS Client** program. Leaving the data path blank configures the data files to reside in the same drive and directory where the program files reside. Additional GLS clients must be configured to reside in a folder in the Current Working Directory.

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Virus Checking Software

There have been reports of virus checking software adversely affecting performance and sometimes even causing runtime errors. For optimum performance, we recommend excluding the directories from continuous virus scanning software (i.e., the Current Working Directory, all directories under it, any data paths configured for additional GLS clients, and local program directories on workstations). If required, these directories can be virus checked in a full disk scan during non-peak usage times. Firms who have disabled continuous virus scanning have reported significant improvements in performance and access times.

Additional details regarding antivirus software, including virus checking of e-mail, can be found in our Knowledge Base in Article R10760 - "Antivirus Software Information."

Power Management Settings

Certain power management settings can cause lost connections. Review your power management settings for the server and all workstations that use Tabs3 and PracticeMaster, and make sure they are set to **Never Sleep**. When a computer goes into Sleep Mode, the connection to the server may be lost. This may result in the user remaining logged in, and thus requiring a reset. Additional information regarding power management settings can be found in our Knowledge Base in Article R10339 - "Power Management Issues with Tabs3 and PracticeMaster Software Products."

Sample Data

Sample data is automatically installed with full user versions and trial versions. This data is useful for training new personnel or trying out new features. During the SETUP process, the following program groups will be created on the **Start** menu.

Tabs3 & PracticeMaster	Use the icons in this group to access the full user versions. When first using the icons in this group, there will be either no data or only the data from the Starter Data Set.
Trial Software	This program group is found under the **Tabs3 & PracticeMaster** program group and is installed only if Trial Versions are installed from the CD. Use the icons in this group to access the software without the sample data. Using the trial version data has no effect on your regular data files or the sample data files because the trial version data is located in a directory named EVAL that is created under the directory specified during the SETUP process.
Trial Software with Sample Data	This program group is found under the **Tabs3 & PracticeMaster** program group and is always installed. Two sets of icons are included in this group: **Sample Data** icons and **Refresh** icons. Use the **Sample Data** icons found in this folder to access the sample data. This data can be refreshed back to its original status at any time by using the appropriate **Refresh** icons. Using or refreshing the sample data has no effect on your regular data files because the sample data is located in a directory named TUTOR that is created under the directory specified during the SETUP process.

PracticeMaster Sample Documents Note: The following Areas of Practice are installed with the PracticeMaster sample data: Personal Injury - Plaintiff (PI), Probate Law (PROBATE), Foreclosure (FORECLOSE), Administrative/Personnel (ADMIN), Business Law (BUSLAW), Family Law (FAMILY), Wills & Trusts (WILLS), Criminal Law (CRIMLAW), Real Estate Law (REALEST), Workers' Compensation (WC), and Continuing Education (CONT_ED). Several of these Areas of Practice include sample documents in the corresponding DOCS folder in the Area of Practice folder. Likewise, the CMSYSTEM folder includes system-wide documents that can be used for any client (regardless of Area of Practice) in a DOCS folder under the CMSYSTEM folder. A complete list of all documents and files that are installed with the Areas of Practice can be found in our Knowledge Base on the Internet in Article R11064 - "Contents of PracticeMaster Area of Practice Templates" at *support.PracticeMaster.com*.

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Starting the Software

The software can be started via a shortcut icon on the Windows desktop or via the Windows taskbar.

Desktop Shortcut   During installation, if you elected to create icons on the desktop, you can double-click the associated desktop icon.

Windows Taskbar   The software can be started via the Windows taskbar. Click the **Start** button, and then point to **Programs**. Point to the **Tabs3 & PracticeMaster** folder and then click the menu option for the desired software product.

Logon   After starting the software, the Logon dialog box may be displayed. No User ID is required. Simply leave the **User ID** and **Password** fields blank and click **OK**.

Startup Checklists & Quick Start Guides

Quick Start Guides are available for Tabs3 and PracticeMaster. Quick Start Guides are provided in PDF format and require Adobe Reader or other software that will open PDF files. Once the software has been installed, the Quick Start Guides are available in PDF format by clicking on *Start | All Programs | Tabs3 & PracticeMaster | Documentation*, and can be printed using Adobe Reader. Quick Start Guides are also accessible via our Knowledge Base Article R11467, "Quick Start Guides for Tabs3 & PracticeMaster," at *support.Tabs3.com*. Additional information regarding the various documentation available can be found in our Knowledge Base Article R11194, "Help Resources."

Additionally, checklists for new installations can be found in Chapter 2 of each software product's manual.

PracticeMaster Area of Practice Templates

Several predefined Area of Practice Templates are bundled with the PracticeMaster Premier software. An Area of Practice Template consists of predefined file definitions for an Area of Practice and may include precoded documents and reports unique to each Area of Practice. All file definitions, documents and reports provided with each Area of Practice Template can be modified. You can use any of the Area of Practice Templates "as they are" or you can modify any portion of the templates to better suit your practice.

A separate set of instructions regarding how to install PracticeMaster Area of Practice Templates is included with PracticeMaster orders. These instructions are also included on the CD in a PDF file in the following location:

   \APPS\TEMPLATE\AOP_INST.PDF

Area of Practice Templates that can be imported into PracticeMaster are located on the CD in the following directory:

   \APPS\TEMPLATE

Miscellaneous Notes

If you install PracticeMaster *after* Tabs3 has been set up and running, use the "Synchronize PM and Tabs3/TAS" program in PracticeMaster to pull over the information from Tabs3.

If you install Tabs3 *after* PracticeMaster has been set up and running, you must first run the "Transfer Billing Lookup Files from PracticeMaster" program in Tabs3 to transfer existing data in PracticeMaster's billing system lookup files to Tabs3 (i.e., timekeepers, categories, transaction codes, task codes, and locations). After this program is run, you must then run the "Synchronize Tabs3 and PracticeMaster" program in Tabs3 to pull over all information from PracticeMaster. If the "Transfer Billing Lookup Files from PracticeMaster" program is not run before the synchronization program, the data in PracticeMaster's billing system lookup files will be overwritten with Tabs3 data thereby effectively erasing the PracticeMaster data. This is because the synchronization for the billing lookup files is one way only (from Tabs3 to PracticeMaster). Be sure to run these programs *before* adding records to the Tabs3 data files.

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Documentation

The software is provided with manuals, written tutorials, and help, all of which are installed automatically with the software. Quick Start Guides are also available for Tabs3 and PracticeMaster. Manuals, tutorials, and Quick Start Guides are provided in PDF format and require Adobe Reader or other software that will open PDF files. Once the software has been installed, the manuals, tutorials, and Quick Start Guides are available in PDF format by clicking on **Start | All Programs | Tabs3 & PracticeMaster | Documentation**, and can be printed using Adobe Reader. Manuals are also accessible via our Web site at *www.Tabs3.com*. Additional information regarding the various documentation available can be found in our Knowledge Base Article R11194, "Help Resources," at *support.Tabs3.com*.

Training Videos

Training videos are available for training purposes for Tabs3 and PracticeMaster. These videos are ideal for introducing unfamiliar features as well as training new personnel. The training videos can be accessed via the Help provided with the software, via the software's Help menu, or from the Web at *www.Tabs3.com/videos*.

Free PracticeMaster Basic System

A free copy of PracticeMaster Basic is included with every Tabs3 system. PracticeMaster includes calendaring, case management and contact management. It does the things you already have to do, only faster. This is an ideal time to install and try out PracticeMaster Basic. In just a few seconds you can have your contacts and calendar imported from both Tabs3 and Outlook into PracticeMaster.

Tip: Want more information about PracticeMaster Basic? Interested in the advanced practice management features of PracticeMaster Premier? Check out our Web site at *www.PracticeMaster.com*.

Instructions to install PracticeMaster Basic can be found in our Knowledge Base on the Internet at *www.support.PracticeMaster.com* in Article R11027, "Installing Your FREE License of PracticeMaster Basic."

Tip: Not sure where to start? You can access the Demo Slideshow and Training Videos from the **Start | All Programs | Tabs3 & PracticeMaster** menu to learn more about Tabs3 and PracticeMaster. If you prefer, a written "hands-on" tutorial is automatically installed when the Documentation is installed. Have questions? Call our Technical Support Staff at (402) 419-2210. Our trained representatives will be happy to answer your questions. Give PracticeMaster a try. It may be just what you've been looking for.

Tabs3 Taskbill

Taskbill is a program that exports billed fee and cost transactions from Tabs3 in an electronic format. This exported data can then be sent to a variety of companies that require electronic billing. Companies requiring data in an electronic format can in turn import this data into their billing program for further manipulation. The sole purpose of the Taskbill program is to export data into an ASCII file that is mapped to a specific company's required file format.

Instructions for Tabs3 Taskbill are included in the Help provided with the Taskbill software. Instructions can also be found in our Knowledge Base on the Internet at: *support.Tabs3.com*

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Tabs3 Report Writer

A Tabs3 Report Writer trial version cannot be installed without installing a Tabs3 trial version. You can install a trial version of Tabs3 and Tabs3 Report Writer in a separate location on your hard drive. Alternatively, if you want to try out the Tabs3 Report Writer trial version with your Tabs3 data, you can use the following procedures. *(Platinum Note: Platinum installations cannot use the following method. If using a Platinum version of the software, you can install a trial version of Tabs3 and Tabs3 Report Writer in a separate location on your hard drive.)*

▶ **To use a Tabs3 Report Writer Trial Version with Existing Tabs3 Data**

1. Start the Tabs3 full working version.

2. From the **File** menu, select **Back Up Data Files**. After the backup is completed, close Tabs3.

3. From the CD, select **Trial Software** and install both Tabs3 and Tabs3 Report Writer into a different location than the full working version.

4. Using Windows Explorer, copy the STBACK.ARQ file from the BACKUP folder under the Tabs3 full working version directory to the BACKUP folder under the trial version directory. *(Note: The destination folder will be in an EVAL\BACKUP folder under the directory you installed the trial version in. The BACKUP directory may need to be created.)*

5. Start the Tabs3 trial version. From the **File** menu, select **Restore Data Files**. *(Note: Ignore any message indicating any other software in the backup file has not been installed.)*

6. From the **Reports** menu, select **Tabs3 Report Writer**. You can now use the Tabs3 Report Writer trial version with your data. However, as a limitation of the trial version, only the first 25 clients selected will be reported.

Tabs3 Report Writer Note: Once installed, the Tabs3 Report Writer is accessed via the **Reports** menu in Tabs3.

GLS Report Writer

GLS Report Writer *must* be installed in the same directory as GLS.

GLS Report Writer is accessed via the **Reports** menu in GLS.

Sample Reports for GLS Report Writer User Systems: There are four sample reports included when a GLS Report Writer user system is installed. These sample reports are loaded into both your working directory (i.e., the *Tabs3 & PracticeMaster* group) and the TUTOR directory beneath the working directory (i.e., the *Tabs3 & PracticeMaster | Trial Software with Sample Data* group). These report definitions will require editing to work with your data if: 1) the chart of accounts from the Starter Data Set was not installed; 2) the chart of accounts was edited; or 3) the Account # Format was changed.

Trial Version Notes: The GLS Report Writer trial version will only work with a GLS trial version; it will not work with a full working version of GLS.

Trial Version Limitations

If the software you have installed is a trial version, the following limitations are imposed to prevent the software from being used as a fully functional product:

Tabs3   There is a limit of 30 clients. You cannot run the Advance Current Reporting Month, Data File Integrity Check, or Reindex Files programs.

PracticeMaster	There is a limit of 30 records in each file with the following exceptions. There is a limit of 130 calendar records (excluding Calendar Plan Template records). There is a limit of 50 journal records and 100 Contact records. There is no limit to the number of records in the fee, cost, calendar code, transaction code, task code, and macro files. You cannot delete records. You cannot run the Data File Integrity Check program.
PracticeMaster Briefcase	PracticeMaster Briefcase can only be used with PracticeMaster Premier. A PracticeMaster Briefcase trial version has the same limitations as the PracticeMaster Premier trial version and must have the same serial number as the PracticeMaster product. Therefore, a Briefcase trial version can only be used with a PracticeMaster trial version. If you want to evaluate PracticeMaster Briefcase but you have a full PracticeMaster Basic or full PracticeMaster Premier version installed, you must install the trial versions of both PracticeMaster Premier and PracticeMaster Briefcase into a separate location. Use the "Trial Software" option on the CD to install trial versions.
GLS	There is no limit for journal entries. You cannot run the Advance Current Posting Month program. You cannot run the Data File Integrity Check or Reindex Files programs.
APS	There is a limit of 16 vendors and 32 invoices. You cannot clear vendor analysis totals or select invoices to be saved or purged. You cannot run the Data File Integrity Check or Reindex File programs.
TAS	There is a limit of 25 trust accounts and a limit of 50 trust transactions. You cannot run the Data File Integrity Check or Reindex Files programs.
Tabs3 Remote	There is a limit of 25 fee transactions. There is a limit of 25 cost transactions.
Tabs3 Report Writer	Only the first 25 clients in the file that meet the selection criteria are used for the report. Additional information regarding the Tabs3 Report Writer trial version can be found on page 8.
GLS Report Writer	The GLS Report Writer trial version will only work with a GLS trial version; it will not work with a full working version of GLS. Four reports are included and may be edited, but not saved or deleted. Only one additional report can be added. This report can be saved and deleted. Additional information regarding the GLS Report Writer can be found on page 8.
Taskbill	A limit of 10 records per client are imported.

Uninstalling the Software

If you want to remove the software from the hard drive, use the following procedures:

▶ **To remove the software**

1. From the Control Panel, select **Add/Remove Programs**.

2. Select **Tabs3/PracticeMaster Local Installation**, **Tabs3/PracticeMaster Programs** or **Tabs3/PracticeMaster Icons**, whichever is present. Selecting **Tabs3/PracticeMaster Programs** will remove the program files but not the data files. Selecting **Tabs3/PracticeMaster Icons** will remove the shortcuts.

3. Follow the on-screen instructions.

Note: The data files are not deleted. This is by design. You can manually delete these files after uninstalling the programs using Windows Explorer. Data files are located in the program folder specified when the software was installed. If you are not sure where this is located, you can start the software and select *Help | About*, which will show the Current Working Directory. If the software has already been uninstalled, you can search for STUSER.DAT on the hard drive in order to locate the remaining data files. Additional details regarding uninstalling the software can be found in our Knowledge Base in Article R11376 - "Uninstalling Version 16 Software" at *support.Tabs3.com*.

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ʻTabs3
ʻPracticeMaster

Software Installation
Frequently Asked Questions

The following information is provided to facilitate a successful implementation and installation of the software. A Frequently Asked Questions section is included, followed by a list of Network Issues to review. Additionally, our Knowledge Base includes detailed information on various topics mentioned in this document. You can find our Knowledge Base on the Internet at:

www.support.Tabs3.com

Frequently Asked Questions

Will the software run under Windows 7 and Vista?

Yes. Tabs3 and PracticeMaster will run under Windows 7 and Vista SP1 or later. When running as a Windows 7 or Vista stand-alone system or as a Windows 7 or Vista workstation that connects to a Microsoft Windows Server 2008/2003 (either 32-bit or 64-bit) or Windows XP Professional, all functions can be run with UAC enabled. Additional information regarding Vista is provided in Knowledge Base Article R11238, "How Windows 7 and Vista Affect Tabs3 and PracticeMaster Software."

Will the software run under Windows XP?

Yes. The software can run under Windows XP. If using the Platinum version, be advised that the Platinum server will not run under Windows XP; however, Windows XP workstations can access the Platinum software. The software does not support running under Windows 2000, Windows 98, Windows Me, or Windows NT4.

How can I tell which version of Windows I am running?

Right-click **My Computer** and select **Properties**.

We are running on a network and intend to have multiple workstations use the software. What is the installation procedure?

Be sure to use the instructions provided with the software for complete details. To summarize, however, you first install the software onto the server from the CD. Once the software is installed onto the server, you then run the SETUP program off of the server's hard drive from each workstation that will be accessing the software.

How long does it take to install the software?

Installing the software onto the server takes less than 15 minutes. Allow approximately 5-10 minutes additional installation time for each workstation.

We know about the manuals, help and Knowledge Base. Is there any other documentation provided that we should be aware of?

Yes. There are several other documents we provide that you may be interested in.

- A "ReadMe" (READWSTI.HTM) file is provided with the software that contains late breaking information that may not be available in other documentation. You can access the ReadMe file from the **Start** button using the following menus: *Start | Programs | Tabs3 & PracticeMaster | ReadMe*.
- Installation instructions are provided with the software. These instructions can also be accessed from the CD browser.
- Training videos are available for PracticeMaster and Tabs3. They consist of videos with sound that are ideal for introducing unfamiliar features as well as providing training for new personnel. The training videos can be run from within the software, accessed via the software's Help, or from the Web at *www.Tabs3.com/videos*.
- Written tutorials for Tabs3, PracticeMaster, GLS, APS, and TAS can be accessed via the **Start** button by selecting **Programs** | **Tabs3 & PracticeMaster** | **Documentation.** These tutorials are provided in PDF format. They provide hands on, step-by-step instructions that allow you to become familiar with the most commonly used features and functions of the software at your own pace.
- Quick Guides are available for various PracticeMaster features. Quick Guides are short graphic-laden documents that introduce features by focusing on what you need to know to get started. These guides provide a useful alternative for users who need to start using the software right away with a minimal amount of instruction or training. They are ideal for attorneys to use as an introduction to the most commonly used features in PracticeMaster. Quick Guides are provided as PDF files and can be accessed via Knowledge Base Article R11130, "PracticeMaster Quick Guides."
- A monthly newsletter is provided for maintenance users. This newsletter includes timely articles along with questions and answers about the software. Additional information regarding newsletters can be found on our Web site at:
  www.Tabs3.com/support/newsletters.html

Does the software support UNC paths?

Yes. Universal naming conventions can be successfully used in all areas of the software including paths and desktop shortcuts.

Does the software support long filenames?

Yes. When saving reports to the hard drive, you can use long file names.

Will our antivirus software cause any problems with the software?

We recommend excluding the directories where the Tabs3 and PracticeMaster software is installed from continuous virus scanning in order to optimize performance and eliminate the potential for runtime errors as discussed in the "Network Issues" section on page 4.

Do we need any special rights to install the software?

Yes. You must have Administrator privileges when installing the software or running the SETUP program for workstations. Additional details can be found in our Knowledge Base Article R11434, "User Rights Needed to Install and Use Tabs3 and PracticeMaster Software."

Do we need any special rights to run the software?

Yes. All users must have all rights to the program and data directories. Additional details can be found in our Knowledge Base Article R11434, "User Rights Needed to Install and Use Tabs3 and PracticeMaster Software."

Do we need any special rights to use PracticeMaster?

Certain settings are written to the Windows registry for a few PracticeMaster features. Therefore, in order to successfully install and use these PracticeMaster features, they must be installed by a user who has Administrator credentials. If you are running the software without these credentials, you will be asked to enter them at the time they are required. These features include: Outlook Plug-in for e-mail integration (PM Basic or PM Premier), Internet Explorer Plug-in, Word Plug-in, Excel Plug-in, Adobe Plug-in, WordPerfect Plug-in, HotDocs Document Assembly Plug-in (PM Premier only), and Word Document Assembly Plug-in (PM Premier only).

Are there any special rights required for spell checking?

No.

Do we need to configure anything for printing?

You can print to any Windows printer that is available on your computer. You may want to specify which font you want used *(File | Print Setup)*. An **Advanced Printing Features** button in Print Setup lets you configure more advanced settings such as whether you want to use footers, commas, gray shading, gray text and lines, red text as well as other printing options. Some firms will configure different printers if they will be using different fonts or settings for statements or checks. Knowledge Base Article R10776, "How to Set up Separate Printer Configurations for the Same Printer," contains details regarding when you might want to do this and detailed procedures for setting up separate printer configurations for the various versions of Windows.

Do we need to configure anything to accept credit card transactions in Tabs3?

Yes. You first need to set up an account with TSYS Merchant Solutions. Details can be found on our Web site at *www.tabs3.com/cci*

What if I have problems installing the software?

Information on how to troubleshoot CD installations can be found in Knowledge Base Article R11277, "Troubleshooting Tabs3 and PracticeMaster CD Installations." If this article does not resolve your problem, call our Technical Support Department at (402) 419-2210.

We have been using the trial version of Tabs3 and recently purchased the software. We want to use the data that we created during the trial period with our full-user version. How can we do this?

Procedures to use data entered in the trial version can be found in Knowledge Base Artilce R10341, "Trial Software Information."

We have been using Tabs3 for some time and have just purchased PracticeMaster. Is there anything we need to know regarding the installation of PracticeMaster?

Make sure all users are out of Tabs3 when PracticeMaster is installed. Also, when asked if you want to install starter data during the installation process, select **Yes** so the calendar codes and report writer definitions are installed.

After installing the software on the server, you can run the SETUP program located on the server from the other workstations to create PracticeMaster desktop shortcuts.

Once PracticeMaster has been installed, start it up. The Customization window will be displayed. Save the default customization settings. Then run the "Synchronize PM & Tabs3/TAS" program in PracticeMaster to synchronize your Tabs3 data to PracticeMaster.

While working in the software, I received a message indicating that system activity information had been reset. When I clicked the OK button, the program automatically closed. Why?

Someone reset your User ID while you were actively using the software. Knowledge Base Article R10789 - "Resetting Users" discusses when it is, and when it is not, appropriate to reset users, and why this can cause a problem. It is very important that all users in the firm be educated regarding the unnecessary issues that can occur when users are reset while they are still in the software.

We have several employees who want to integrate PracticeMaster with their smartphones. What do you recommend?

Users of Tabs3 and PracticeMaster Platinum can access their data from anywhere they can access the Internet using Tabs3 Connect. Tabs3 Connect is a Web-based application that allows users to sign in to an easy-to-use interface for their Tabs3 and PracticeMaster data. Tabs3 Connect allows touch

or mouse-based interaction, and is designed to work with both handheld and tablet (or larger) screen formats.

Additionally, PracticeMaster has the ability to integrate with smartphones via Microsoft Outlook. Contacts and calendar records can be synchronized using the Outlook Integration feature.

What is the Platinum version of the software?

Tabs3 and PracticeMaster Platinum are the top of the line products offered by Software Technology, Inc. These programs utilize state of the art database technology to ensure the fastest performance and lowest network impact possible. They also include advanced reporting options, administrative tools, and mobile access to your Tabs3 and PracticeMaster data. Auto-Recovery, HotBackup, Accelerators, and the Log Off Users features all work together to enhance the overall usability, performance, and reliability of the software. Tabs3 Connect provides access to Tabs3 and PracticeMaster anywhere you can connect to the Internet. PracticeMaster Platinum also includes eNote, an intra-office messaging feature, and an Exchange Connector, which allows you to synchronize PracticeMaster calendars and contacts with Outlook via Microsoft Exchange without logging into PracticeMaster. As your firm grows, Platinum will scale with you, limiting degradation in performance caused by processing increasing amounts of data.

For more information on the Platinum version of the software, contact the reseller from which you purchased the software or our Sales Department at (402) 419-2200. Additional information can be found in Knowledge Base Article R11379, "Platinum Software Overview" *(www.support.Tabs3.com)*.

Network Issues

When implementing the software on a network, we have found that there are various factors that can cause problems, such as continuous antivirus software scanning and not having the most recent patches installed for your computer network and operating systems. We recommend that you review the following information and address the issues that apply to your firm. The following information includes where you can find additional details.

Review Network Problems White Paper in Knowledge Base (R10200)

Knowledge Base Article R10200, "Redirector Problems and Other Network Problems," discusses various known problems in detail and contains the most current information regarding network issues. We recommend that your network administrator review this material.

Virus Scanning

There have been reports of virus checking software adversely affecting performance and sometimes even causing runtime errors. For optimum performance, we recommend excluding the directories from being continuously scanned by antivirus scanning software. These directories can be virus checked in a full disk scan during non-peak usage times. Firms who have disabled continuous virus scanning have reported significant improvements in performance and access times. Additional details can be found in Knowledge Base Article R10760, "Antivirus Software Information."

NIC Drivers

Network Interface Cards (NIC) can cause problems if the most current drivers are not installed. Knowledge Base Article R10200 discusses these problems and others in depth.

Power Management

Certain power management features on computers have been known to cause problems on servers or computers. Knowledge Base Article R10339, "Power Management Issues with Tabs3 and PracticeMaster Software Products," discusses these problems in detail.

Network Settings Utility

A new Network Settings utility is built into the software and can be accessed via the *Help | Diagnostics* menu. This utility tests your sever for various Windows Server and Novell settings. Knowledge Base Article R11309, "Network Settings Technical Information," provides details regarding this utility program.

Network Test Utility

If you are having problems with errors, lockups or data corruption on your network, a Network Test utility is built into the software and can be accessed via the *Help | Diagnostics* menu. This utility can be used to test for basic network reliability. Knowledge Base Article R11304, "All About Network Test," provides details regarding this utility program.

Additional information and troubleshooting for network issues can be found in Knowledge Base Article R10184, "Network Troubleshooting Guide."

Tabs3 PracticeMaster

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User Newsletter

Sample User Newsletter:
Welcome!

Welcome to the family of thousands and thousands of professional firms using Tabs3 and PracticeMaster software. The User Newsletter informs you and helps you better utilize the features of Tabs3 and PracticeMaster products. The following is a sample of some of the articles, questions, and answers found in a typical User Newsletter.

Getting Around

This front page of the newsletter will normally contain a brief summary of all of the issue's contents, which can be handy if you're looking through archive articles looking for something specific.

In the left column on every page of the newsletter is the "In This Issue" table of contents box. Not only does this list the articles, but each article title is also a hot link that will jump you directly to that article's page when you click on it. Articles that span more than one page will also include hot links to jump to the next section.

Some articles will also contain URLs, references to Knowledge Base articles, e-mail address, etc., that will be highlighted by bold, red text. These are also clickable links.

Benefits of Maintenance

When you purchase a Tabs3 or PracticeMaster license, you receive a one year maintenance agreement. The maintenance agreement gives you access to the monthly user newsletter and archived newsletters on our Web site. It also entitles you to free technical support, instead of paying $50 for every 15-minute increment, and cheaper upgrades – apply the original cost of your software license towards the purchase of a larger system as your firm grows. Firms with a maintenance plan also receive free software updates. Because the price of maintenance is *less than half* the cost of a software update, staying on maintenance truly is the best value for your firm.

For answers to questions about Tabs3 and PracticeMaster maintenance plans, or to renew a maintenance plan, call (402) 419-2200 or e-mail **sales@tabs3.com**.

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Software Technology, Inc., is a Gold Certified Partner in the Microsoft Partner Program

 Read the full press release here.

Feature Article:

Does Your Backup Strategy Meet Your Needs?

There are many facets to making a good, reliable backup. Does your current backup strategy meet your needs? It may be time to revise your backup routine to include new information, and maybe a new location.

How often do you make a backup of your important information? Weekly? Monthly? Never? The best way to determine how often you need to make a backup is to ask one question: If your firm became a victim of a natural disaster, what would be a reasonable amount of data to manually re-enter? If you are okay with re-entering a month's worth of information, a monthly or weekly backup may work well for you. If you enter a large volume of information each day, a nightly backup may work better for your firm. Based on your answer, this question will help you make a sound decision regarding your backup routine.

Once you have decided on a frequency for your backups, the next consideration will be the location. Wherever you choose to store your backup media, be sure there is enough space to hold several copies of the information you intend to back up. It is a good idea to store more than one backup to be sure that an error-free restore is possible. These backups can be kept on-site, off-site, on the Web, or using any combination of these options. With so many different kinds of backup media, you will need to decide what is best for your firm.

With off-site backups, you will be able to create a backup and store it separately from the live data. This ensures protection against theft, hardware failure, fire, and most natural disasters. Data can be stored on a DVD, CD, external hard drive, jump drive, or any other external media. On-site backups are created and stored at your firm. These may not protect you from natural disasters or theft, but with an on-site external backup you would still be protected from hardware failure. Finally, Web backups are gaining popularity. Storing a virtual copy of your important data files on a secure Web site can alleviate each of the threats listed above. However, when storing information on the Web or other server, it is critical that this information is secure and *not* accessible to others outside your firm. This will ensure that you maintain client confidentiality, abide by the license agreement and software copyright, as well as protect your firm from liability issues. In the end, where you choose to store your external backup will be determined by your available resources and location.

Now that you have decided frequency and location of your backups, it is time to review the content of these backups. This takes us back to the question in the second paragraph – What would be a reasonable amount of data to manually re-enter? This includes reinstalling and updating software, along with re-entering the data within these programs. You will want to look at the backup requirements for each program that you regularly use and figure out their recommended backup strategies. The Tabs3 and PracticeMaster software suggested backup strategy is provided in the Knowledge Base article **R11213**, "Backup Strategy." This article outlines how to successfully back up the Tabs3 and PracticeMaster program and data files and explains what is backed up when using the internal backup program.

Backup Checklist

✔ Frequency

✔ Storage Location

✔ Content

✔ Time of Day

✔ Schedule Periodic Tests

Backup...Continued

The time of day you decide to make the external backup is determined by its content and the software you currently use. It is important to note that an external backup of the Tabs3 working directory will ***not*** be reliable while users are logged into the software. However, if you currently use the Platinum software, you can make a HotBackup of the data files while users are in the software. This allows you to make an external backup of the HotBackup folder whenever a HotBackup is not currently running, and back up the working directory less frequently to ensure you have program files you can restore in the event of a disaster. If you do not have the Platinum software, you can still create an external backup of the Tabs3 working directory, but it must be done when no one is logged into the software, typically outside of working hours. This ensures that your backup contains complete copies of all data and program files. Many external backup programs can be automated to run during the night and on weekends.

The final and most overlooked step of creating a backup routine is to test your backups regularly. Your backups will not be worth your time and energy if they cannot be restored. You may want to consider speaking with the person in charge of maintaining your backups and make sure there is a good understanding of how to restore a backup when necessary. This person can also be the one to test the backup regularly by restoring to an alternate directory. By confirming that your backup can be restored without errors, you have proven that the backup system is working correctly.

Whether you choose to back up weekly or daily, having a dependable backup is essential to the well-being of your firm. Therefore, it is important to understand how often a backup must be made, where the backup is stored, and what must be included in such a backup. If you have concerns about whether or not you are properly backing up the Tabs3 and PracticeMaster data, contact your local reseller or consultant, or our Technical Support department at (402) 419-2210. Whatever you do, don't wait until it's too late to ensure your backup strategy is reliable.

KB Corner:

Frequently Asked Questions

From time to time, you may need answers to some common questions regarding every program. Although the User Newsletter is a great source of Frequently Asked Questions (FAQs), we know every question cannot be included in every newsletter. For your convenience, we have made FAQ articles regarding each major program available to you in easy-to-find Knowledge Base articles.

- **R11103** – Tabs3 Frequently Asked Questions
- **R10588** – PracticeMaster Frequently Asked Questions
- **R11106** – Tabs3 Trust Accounting (TAS) Frequently Asked Questions
- **R11104** – Tabs3 Accounts Payable (APS) Frequently Asked Questions
- **R11105** – Tabs3 General Ledger (GLS) Frequently Asked Questions
- **R11405** – Platinum Frequently Asked Questions

In addition to the general FAQ articles, there is also a set of FAQ articles for year-end. The articles listed in **R10429**, "Year-End Overviews for Tabs3 Software Products," provide procedures and frequently asked questions specifically directed at year-end situations.

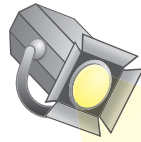You can find our Knowledge Base at **www.support.Tabs3.com** for more information.

Tabs3 PracticeMaster
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Product Spotlight:
PracticeMaster Basic

What is PracticeMaster software? It is the flexible practice management software that comes free with your purchase of a Tabs3 Billing Software license. A single user license of PracticeMaster Basic is provided with every Tabs3.

Practice management is much more than the personal calendar and contact lists that you can find in any e-mail software. PracticeMaster Basic features advanced conflict searching and contact management, along with a firm-wide calendar that can include client information. The Conflict of Interest Search in PracticeMaster utilizes search indexes that you can set up to control the order in which fields are searched, allowing it to run significantly faster. It offers more versatility regarding what can be indexed; for example, you can set up a permanent index to control the sort order of any data file in PracticeMaster. It also allows you to control which fields will be searched, and therefore which fields won't be searched, for conflict information.

You can use the PracticeMaster Matter Manager to view your appointments, contacts, correspondence, and billing information for each matter in one convenient location. If you use Outlook, don't worry. PracticeMaster integrates with Microsoft® Outlook®. You can synchronize your calendar and contacts. You can also turn e-mail messages into appointments, fees, and journal records linked to your client and contact files.

Once you see how PracticeMaster Basic helps to organize your practice, upgrade to PracticeMaster Premier for even more features. In Premier, you can organize your client and matter information, perform document assembly (which allows you to create templates for the documents you use most, and then compile them using information stored in PracticeMaster), create and use calendar plan templates (which allow you to create templates of data ranges based on statute requirements, and then apply these schedules to client calendars), and more. A full comparison of the differences between PracticeMaster Basic and PracticeMaster Premier is provided on our Web site at **www.Tabs3.com/products/PracticeMaster/pm_comparison.html**.

Don't wait! Give PracticeMaster a try! Step-by-step instructions to install your free copy of PracticeMaster Basic are available in the Knowledge Base Article **R11027**, "Installing Your FREE Copy of PracticeMaster Basic." For more information regarding your free copy of PracticeMaster Basic, please contact your local reseller or Technical Support at (402) 419-2210.

Tabs3 and PracticeMaster win Law Technology News® awards!

LTN
Law Technology News

TECHNOLOGY AWARDS 2010

GOLD WINNER

Tabs3 and PracticeMaster were recognized as Top Software Products for the **Eighth Year in a Row**!

◯ **Read the full press release here.**

Accessing Matter Information

QUICK TIP

Use the Matter Manager to see detailed information for a client's matter. In PracticeMaster, press Ctrl+M to automatically open the Matter Manager. In the Record Type Selector, select All Activity. This will display all journal, calendar, fee, and other related records in the list on the right.

Questions and Answers:

Tabs3 Billing Software

Getting Started

I need to get Tabs3 up and running as soon as possible and I just don't have time to read the entire manual cover to cover at this time. What should I do first?

Read Chapter 1, Introduction & Getting Started, and Chapter 2, Using & Setting Up Tabs3, of the Tabs3 manual! Step-by-step procedures to begin using Tabs3 are outlined in these chapters. Referrals to specific sections in the manual and Help are included for quick reference. This includes page references, such as starting on page 16 for information on how to select the Customization options.

Statement Customization

How can we add personal messages to our statements?

Tabs3 allows you to define messages at the system level, at the statement template level, and at the client level.

- A system level message can be added on the **Headings** tab of Statement Customization (*Statements | Statement Setup | Statement Customization*). Up to 250 characters of text can be entered on this tab to print at the end of all billing statements.
- Template notes can optionally be set up for each statement template (*Statements |Statement Setup | Statement Templates*). On the **General** tab, select the desired Beginning Note and Ending Note.
- Unique text can be entered for each client in the **Ending Statement Notes** field on the **Statement Options** tab of the Client file. Similar messages can be added to the beginning of statements for additional flexibility.

Billing Address Options

My client would like his statement sent to his e-mail address and a third-party address for billing purposes. How can I do this?

To accomplish this, look up the client in the Client file and confirm that an e-mail address is displayed on the **Address** tab. If not, click the hyperlink text next to the **Contact Name**, enter an e-mail address for his contact record, and save the contact record. In the Client file, select the **Billing Preferences** tab. Double-click the record listed in the client's Statement Delivery Options table. Clear the **Mail Statement** check box and select the **E-mail Statement** check box. At the bottom of the Bill To Record window, confirm that his e-mail address is displayed, select a valid e-mail template, and click **OK**.

To set up an additional Bill To recipient, on the **Billing Preferences** tab of the Client file, click the **Add** button. In the **Bill To Name** field, select the desired contact or add a new contact. Select whether the contact will receive statements via mail or e-mail, and set up the associated options, such as the address to be printed on the statement, whether an attention line will be included, etc. You can press the *F1* key to see a description of each field in the Bill To Record window.

Questions and Answers:

PracticeMaster Software

Calendar Colors

In the calendar, how can I change the colors of the Events?

You can change the color of events using the Calendar Properties program (***Calendar | Calendar Properties***). The Event Colors section on the **General** tab determines the colors displayed for event calendar records in the Calendar window and the Graphical Calendar Report.

When selecting the **Event Colors are based on User ID information** option, the colors specified for a User ID in the System Configuration program are used. Therefore, each user can display his or her own color.

If you select the **Event Colors are based on Calendar Code** information option, the colors specified in **Text Color** field of the Calendar Code file will be used. Therefore, each calendar code can display its own color. If a calendar record is not assigned a calendar code, the colors specified in the **Default Event Color** field of Calendar Properties are used.

If you select the **Use default colors for all events** option, the colors in the **Default Event Color** field are used for all events.
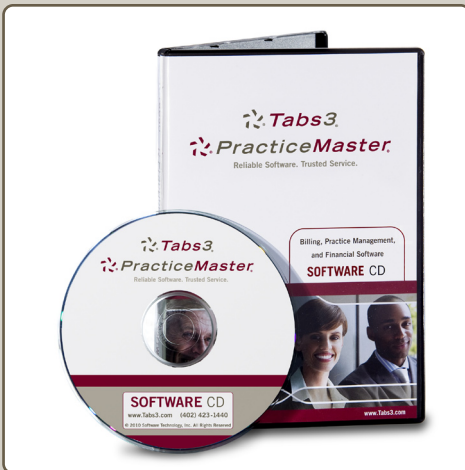
Go ahead and experiment with these different options. They can be changed at any time.

Conflict of Interest Searching

How do I find out which fields are searched in the Conflict of Interest Search?

This setting is shown for each field when you print a file definition in File Maintenance (***Maintenance | File Maintenance***). In the File Maintenance window, right-click the desired file and select **Print File Definition**.

If you review the settings and decide to add fields to the Conflict of Interest Search, in File Maintenance, select the desired file and click **OK**. From the **Field** tab, highlight the desired field in the list of Field IDs and select the **Include in Conflict Search** check box. When you have done this for every desired field, click **Done**. To use the newly-selected fields, you must reindex the search files. From the **Rebuild Index** tab of the Search Settings window (***Search | Search Settings***), select the **Conflict/Contact Index** check box and click the **Rebuild Now** button.

Questions and Answers:

General Ledger Software

Journal Entries for Prior Periods

Can journal entries be entered for a prior month after the month has been closed?

Yes, journal entries can be entered for any prior month in the current fiscal year or any month in the last two fiscal years. The date of the journal entry determines the month to which it is posted. As journal entries are made, the balance for the account is automatically updated. Journal entries made for any prior period automatically adjust balances through the current fiscal month. Journal entries cannot be made to a future month (i.e., a month later than the current fiscal month). If journal entries are made for a prior month, you may want to reprint your financial reports for that month and all subsequent months.

Multiple Data Sets

We maintain several sets of books for our firm and its subsidiaries. Can we do this in GLS?

Yes, GLS allows you to configure up to 999 different sets of data. Each set of data is referred to as a GLS client. Setting up multiple GLS clients allows you to easily keep separate books for multiple entities on the same computer. This is accomplished by storing additional GLS clients' data in separate subdirectories within the current working directory.

Questions and Answers:

Accounts Payable Software

Partial Payments

Can I print a check through APS to pay only part of an invoice?
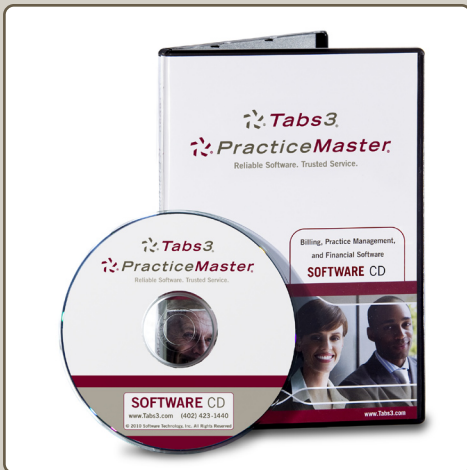
Yes. Enter the portion of the invoice that you want to pay in the invoice's **Amount to Pay** field. When a check is printed, two things occur: a new invoice record is created and the original invoice record will be changed. The new invoice record will reflect the partial amount that was paid and will include the **Check #** and **Date Paid**. The **Invoice Amount** on the original invoice record will be changed to reflect the remaining amount of the invoice. This remaining amount will be shown in both the **Invoice Amount** and **Amount to Pay** fields. The original invoice record will also include the **Last Check #** used to pay a portion of the invoice and the invoice's original amount.

Miscellaneous Vendors

What are miscellaneous vendors?

Miscellaneous vendors are vendors that will be paid one time only. When you want to enter an invoice or a manual check for a vendor that you do not want to add to the vendor file because the vendor will be used only once, then use a miscellaneous vendor. A miscellaneous vendor is a vendor that has the **Miscellaneous Vendor** check box selected in the Vendor file. When adding an invoice or manual check for a miscellaneous vendor, you will be able to enter the vendor's name, address, city, state, and zip code.

Do not use a miscellaneous vendor when you need to accrue 1099 information for the vendor or if you want to retain individual productivity figures for the vendor. You cannot combine invoices for miscellaneous vendors. Additionally, recurring entries cannot be added for miscellaneous vendors.

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 Click here to go back to the front page

Questions and Answers:

Trust Accounting Software

Specifying a Check Number

When entering check transactions, what should I enter for the check number?

The answer depends on whether the check has already been printed. Leave the **Check #** field at the default of "0" (zero) if you will be using the Print Checks program to print the check transaction. If you are entering a check transaction for a check that was not printed by TAS (i.e., the check was written by hand), the check number used for the check should be entered.

Interest & Service Charges

The bank account we use for our trust accounts accrues interest and also incurs bank charges. How do I deposit or withdraw money from the bank account without affecting my trust accounts?

Set up a new trust account for the bank account and call it "Administrative Account". When you need to enter interest deposits or service charge transactions without affecting any of the other trust account balances, enter the transactions using the Administrative Trust Account for the bank account.

Announcement:

Free Webinars!

You are invited to two free monthly Webinars!

Understanding Platinum: The Highest Level of Tabs3 and PracticeMaster Software

Philip Allendorfer, Director of Development for Tabs3 and PracticeMaster, will discuss the benefits of the Platinum version of Tabs3 and PracticeMaster, and explain the technology behind Platinum features, such as Report Accelerators, HotBackup, Transaction Processing, and network compatibility. For the event date and time, or to register, visit: **http://platinumversion.eventbrite.com/**.

Accepting Credit Cards

Bruce Policky, Product Manager for Tabs3 and PracticeMaster, will show you how to save time and get paid faster by allowing your clients to pay with credit cards. He will also demonstrate how to process credit card payments in Tabs3 and trust deposits in Tabs3 Trust Accounting, and discuss how the system is designed to accommodate some state bar association guidelines for accepting credit cards for trust deposits. For the event date and time, or to register, visit: **http://creditcards.eventbrite.com/**.

Thank You!

We hope this sample User Newsletter has been helpful and informative. To ensure that you are provided access to monthly issues of the User Newsletter as well as future updates of the software and free technical support, fill out and return your Registration card. If you have any questions regarding the software, the User Newsletter, or our annual maintenance program, please give us a call at (402) 419-2200.