What's New List for Tabs3 Software Version 2020

Including Tabs3 Billing, PracticeMaster, and Tabs3 Financials

Tabs3 Billing Highlights

- **Matter Manager** - With a new look and feel, the Matter Manager (previously named Client Manager) allows you to view relevant information for each matter at a glance, perform common tasks, and run reports for the currently selected matter. As a central hub for the matter, you can quickly see a list of the recent activity as well as all statements and payments.
- **Statement Manager** - The new Statement Manager allows you to keep track of all your statements and see which have been paid and which are still outstanding. You can also quickly preview, undo, or reprint a statement, enter a payment, client funds, or trust transaction, or write off a statement, directly from the Statement Manager. A Search box is available to quickly locate information anywhere in the list, such as finding a specific statement number when you receive a check.
- **LawPay** – We've partnered with LawPay to provide credit card and eCheck processing in Tabs3 Billing for payments and client funds deposits. You can also include a link with your emailed statements so clients can pay you immediately upon receipt of their bill.
- **Dashboard** – You can now easily check the current state of your firm's billings and collections. Both A/R and WIP transactions broken down by aging periods, as well as monthly cash receipts and billing history for the current and prior years, are all displayed on the new Dashboard tab of the Home Page. In Platinum systems, you can filter the dashboard using specific criteria and drill down in the A/R or WIP to see what clients make up those totals.

PracticeMaster Highlights

- **Time Zones** - You can now specify a time zone for calendar events and tasks. The start time and end time will then display in each user's local time throughout PracticeMaster and Tabs3 Connect. This also provides a more seamless integration with Outlook.
- **NetDocuments Integration** – PracticeMaster now integrates with NetDocuments, a cloud based document management system. Clients entered in Tabs3 Billing, PracticeMaster, or Trust Accounting are automatically added to NetDocuments. NetDocuments files assigned to clients can be accessed, searched, and emailed from PracticeMaster.

Trust Accounting Highlights

- **LawPay** – We've partnered with LawPay to provide credit card processing of deposits in Trust Accounting.
- **Dashboard** – Quickly check the status of your trust accounts, import bank transactions, start a reconciliation, view recent transactions, add new transactions, and print checks, all from the new Dashboard tab of the Home Page.

- **Positive Pay** – Reduce the possibility of check fraud by providing your bank with a list of pre-approved checks. Export files can be customized to suit your bank's requirements, even if you work with multiple banks.

Accounts Payable Highlights

- **Dashboard** – Easily manage your payables from one screen. You can now print or post checks, view the check register, see a list of unpaid invoices, add new invoices, and open attachments directly from the new Dashboard.
- **Invoice Attachment** – You can now store an electronic copy of an invoice or receipt with the corresponding Accounts Payable invoice, manual check, or EFT transaction.
- **Positive Pay** – Reduce the possibility of check fraud by providing your bank with a list of pre-approved checks. Export files can be customized to suit your bank's requirements, even if you work with multiple banks.
- **Bank Balances** – The GLS Account balance is now displayed when adding invoices and printing checks. Additionally, you will now be alerted if the check or EFT you are entering would result in an overdraft.

General Ledger Highlights

- **Dashboard** – Quickly check the status of your bank accounts, import bank transactions, start a reconciliation, view recent transactions, and add journal entries, all from the new Dashboard tab of the Home Page.

All Tabs3 Software

- **Improved Lock Out All Users** – You can now prevent other users from accessing the Tabs3 Software, even when it is closed on your workstation, allowing you to easily perform maintenance tasks such as external backups, server moves, and software updates.
- **Increased Field Limits** – We've increased the character limits of several fields throughout the Tabs3 Software such as the **Work Description** in the Client file. See Knowledge Base Article R11812, "Version 2020 Introduction to New Features," for a complete list of changes.
- **Updated Help** – The help files for each program are now opened in your default browser, and have a new look. Find what you're looking for more quickly using the improved search and index features.
- **Autofill Changes** – We've expanded the autofill results for many fields to show additional information in a second column. For example, when typing in a Client field, the autofill includes the Client ID, Client Name, and Work Description. When typing in a User field, the User ID and the User Name will be displayed.

See the Release Notes for a complete list of changes made in Tabs3 Software Version 2020.

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