What's New List for Tabs3 Software Version 2021
Including Tabs3 Billing, PracticeMaster, and Tabs3 Financials

All Applications

- **Simplified Update** - Updating from Version 2020 to Version 2021 does not require a conversion. If updating from Version 19 to Version 2021, only a single conversion is required.
- **New Look** - We've updated the icons for all of the actions on the Home page in each Tabs3 Software application to provide a fresh look.
- **Guided Tour** - When a new Tabs3 Software user is added, they will see a guided tour the first time they log in to help them learn how to navigate through the applications.
- **Getting Started Checklist** - New users will also see a Getting Started checklist on the Home page, providing an easy way to discover key features.

Tabs3 Billing and Trust Accounting Highlights

- **Tabs3Pay** - Introducing Tabs3Pay, a new electronic payment processing solution with simple pricing and a low fixed rate for all card types. Tabs3Pay allows you to accept credit and debit cards, as well as electronic bank transactions (ACH) or eChecks, for payments and client funds deposits in Tabs3 Billing, and trust deposits in Tabs3 Trust Accounting. You can also include a payment link with your email statements to allow your clients to pay online.

Tabs3 Billing Highlights

- **Lists** - We've added a new way to view clients, contacts, fees, costs, payments, client funds, and write offs without having to run a report. These lists can be filtered to only show information that is important to you, allowing you to take action in one convenient place.
- **Write Off Report** - You can now view all of the information related to your write offs in a single report, including the Date, Amount, Transaction Code and Description, with the option to sort and filter by working timekeeper. Additional options include breakdowns by timekeeper and cost type, statement information, and reversed write offs.
- **Payment Information** - Provides detailed payment allocation information for both archived and work-in-process payments. In addition to payment allocation, this page shows associated Tabs3 General Ledger transactions and payment adjustments (refunds or reversals).
- **Write Off Information** - Provides detailed information about the selected write off, including a breakdown of how the write off was applied (each timekeeper, cost type, tax amount, or finance charge) across each statement that was written off, and who performed the write off.
- **Matter Manager:**
    - **Write Off List** - This list provides an easy way to see any write off performed on the matter.
    - **New Drilldown Pages** - The Statement, Payment, and Write Off information pages can be opened by clicking their corresponding records in the Matter Manager.

- **Statement Status Indicators** - The statement list in the Matter Manager now includes color-coded indicators to help you see at a glance which statements are unpaid and for how long.
- **Report Drilldown** - We've updated numerous Tabs3 Billing reports to support drilling down to statements, payments, and write offs in the Report Preview window.
- **Email an Individual Statement** - In the Statement Manager or Statement Information window, a new **Send Email** action is available. This reprints the selected statement, just like using the Reprint Updated Statements feature, and then starts a new email with the statement attached.
- **Grand Totals for Working Timekeepers** - The Write-Up/Write-Down Report now includes an option to include Grand Totals when sorting by Working Timekeeper.

Tabs3 Trust Accounting and Accounts Payable Highlights

- **IRS 1099-NEC Changes for Tax Year 2021** - We've updated the software to print Form 1099-NEC using the three-forms-per-page format required by the IRS for Tax Year 2021.
- **IRS 1099-MISC and 1099-NEC Changes for Tax Year 2020** - We've updated the software to support new requirements from the IRS for tax year 2020. These changes include:
  - Changed the layout for printing Form 1099-MISC and added the ability to print Form 1099-NEC.
  - Added a new guided walkthrough to the Print 1099 Forms window to help you configure the correct alignment for both forms.
  - Payees and vendors are automatically updated to use new 1099 form boxes.
  - The process for combining payee and vendor 1099 information between Trust Accounting and Accounts Payable has been streamlined.
  - The Tabs3 1099 E-file and Create 1099 Disk File features have been updated to support the new requirements.

Tabs3 Platinum Software

- **Tabs3 Connect Timer** - We've added a timer to Tabs3 Connect, which allows you to create, view, start, and stop timers from anywhere with an Internet connection. Timers can continue running, even if Tabs3 Connect and PracticeMaster are closed, so you can use the timer feature on the go.
- **PracticeMaster Exchange Connector** - Added a new synchronization option to the PracticeMaster Exchange Connector for firms using Exchange Online / Microsoft 365. Tabs3 Software can now communicate directly with an Exchange Online server, simplifying both setup and maintenance of the PracticeMaster Exchange Connector.

See the Release Notes for additional changes made in Tabs3 Software Version 2021.