

What's New List for Tabs3 Software Version 2022

Including Tabs3 Billing, PracticeMaster, and Tabs3 Financials

All Tabs3 Software Highlights

- **Global Contact Management** - Consolidated all of your contacts in one place. Clients, billing contacts, related parties, vendors, payees, logon users, and timekeepers are all now in the Contact file, eliminating the need for duplicate data entry.
- **New Installer** - Updated to a Microsoft Installer. This change requires the first installation to be performed at the server, but will reduce the need to directly access the file server when installing future updates.
- **Improved SnapShot** - Updated the SnapShot pane with a new style and added mouse wheel support for zoom in/out.

Tabs3 Billing & PracticeMaster Highlights

- **Your Information** - Users who are also timekeepers can now quickly see just their information in lists by selecting "My Clients," "My Fees," or "My Costs" in the Clients, Fees, and Costs lists.

Tabs3 Billing, Trust Accounting, and Accounts Payable Highlights

- **Entry Lists** - Added a setting to position data entry lists either below or to the right of the data entry fields. Entry lists are available in the Fee, Cost, Payment, and Client Funds entry windows in Tabs3 Billing, the Trust Transaction entry window in Trust, and the Invoice/Manual Check entry window in AP.

Tabs3 Billing and Trust Accounting Highlights

- **Trust Request Links for Email Statements** - Expanded Email Statements to support Tabs3Pay payment links for Trust deposits. Once configured, your clients can make secure online deposits directly into their Trust account.
- **Trust Requests from Matter Manager** - Added a new method for requesting Trust deposits via the Matter Manager. The Request Trust Deposit action uses Email Templates, Tabs3Pay payment links, and Import Online Payments to greatly streamline this process.
- **New Email Statement Variables** - Added multiple email statement variables, including a new **Make Payment** button, a **Balance Due Total (with Trust)** field, and multiple Trust Accounting fields.
- **New Email Templates** - Created sample Email Templates with a simplified look that include **Make Payment** and **Make Trust Payment** buttons.
- **Import All Tabs3Pay Payments** - Expanded Import Online Payments to include Trust deposits and other Tabs3Pay payments that were made outside of Tabs3 Billing, such as recurring payment schedules set up via Tabs3Pay Web Portal.

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.

Tabs3 Platinum Software

- **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.

Tabs3 Billing Highlights

- **New QuickView** - Added a new QuickView to the Statement Manager called "My Clients Unpaid" making it easy to get a list of your clients with unpaid invoices.
- **List Enhancement** - Totals can now be shown at the bottom of the Fees, Costs, Payments, Client Funds, Write Offs, and Statement Manager lists.

PracticeMaster Highlights

- **List Enhancement** - Totals can now be shown at the bottom of the Fees and Costs lists.

Tabs3 Trust Accounting Highlights

- **Extended Payee Name** - Extended the **Payee Name** field to include more characters for longer payee names.
- **Trust Replenishment** - Clarified the terminology used for trust replenishment options in the Trust Account Information window.

Tabs3 Accounts Payable Highlights

- **Extended Vendor Name** - Extended the **Vendor Name** field to include more characters for longer vendor names.

See the [Release Notes](#) for additional changes made in Tabs3 Software Version 2022.