

What's New List for Tabs3 Software Version 2025

Including Tabs3 Billing, PracticeMaster, and Tabs3 Financials

Tabs3 Billing Highlights

- **Pre-Bill Tracking**- Made multiple improvements to pre-bill tracking and the statement review process.
 - **Generate Statements**- Added a new Pre-Bill option in Generate Statements to improve the paperless review process in the Pre-Bill Tracking window. Pre-bills streamline the review process and prevent unintended transaction changes.
 - **Statement Information**- Added the ability to preview pre-bills and final statements in the Pre-Bill Tracking window using drill-down via the date columns to enhance accessibility. The Pre-Bill or Final Statement Information window also includes the Take Action pane, providing quick links to common actions.
 - **Transaction Protection**- Transactions in pre-bills are protected, allowing users to make changes during the review process by drilling down to the transaction in the Pre-Bill tracking window. For changes to be made outside of Pre-Bill tracking, users must be assigned a new access right "Modify Pre-Bill Transactions Outside of Pre-Bills."
 - **Statement Comments**- Added a Comments pane in the Pre-Bill Information and Final Statement Information windows, allowing users to view and add comments during the review process. The pane's icon displays a notification badge when there are unread comments, ensuring important notes are easily noticed.
 - **Transactions on Statements**- Added "Pre-Bill" and "Final Statement" hyperlinks to the upper-right corner of entry windows to identify transactions included on a pre-bill or final statement. Users with rights to View Statements will be able to open the pre-bill or final statement using this link.
- **Task Based Budgets**- Added an Edit Task Based Billing Budget link to the Take Action pane in Matter Manager. Also added a new access right to control who has the ability to use this link.
- **Fee Recap**- Added column sorting to the Fee Recap Lookup window making it easy to group records when verifying hours.
- **New Payment Methods** - Added PayPal, Venmo, and PayPal Pay Later as optional payment methods when clients pay via a Tabs3Pay payment link or trust request link. Available payment methods can be configured on the **Tabs3Pay** tab of Tabs3 Billing Customization.

PracticeMaster Highlights

- **Document Preview**- Added the ability to preview documents in the SnapShot pane when viewing Document Management lists.
- **Archived Fees and Costs**- Added the option to limit the range of archived fees and costs synchronized from Tabs3 Billing by date. This is particularly useful when adding PracticeMaster to an existing Tabs3 Billing system.

- **Fee and Cost History**- Fee and cost custom field and history tracking information is now retained when fee and cost transactions are archived (final billed and updated).
- **Meeting Attendees**- Updated the Dashboard to display the attendees for Outlook meetings in the tooltip.
- **Fee Recap**- Added column sorting to the Fee Recap Lookup window making it easy to group records when verifying hours.

Accounts Payable Highlights

- **Costs on Statements**- Added "Pre-Bill" and "Final Statement" indicators to the upper-right corner of the Cost Transactions window to identify transactions that cannot be edited in AP because they are included on a pre-bill or a final statement.

Tabs3 Taskbill Highlights

- **Contact Initials**- Added the ability to override a timekeeper's initials using a custom field in the PracticeMaster Contact file.

Tabs3 Platinum Software Highlights

- **Multi-Factor Authentication**- Added the option to enable and configure multi-factor authentication (MFA) for individual Tabs3 Connect users.

All Tabs3 Software

- **Access Right**- Added a new access right "Modify Pre-Bill Transactions Outside of Pre-Bills". Users, including Managers, will need assigned this new access right in order to edit transactions included on pre-bills from outside the Pre-Bill Information window.

See the [Release Notes](#) for additional changes made in Tabs3 Software Version 2025.