

## TL NewsWire™

Hot new products for lawyers and law office administrators.

# Managing Your Practice Includes Managing Your Documents

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It may seem to you like your law firm is organized until you take a step back to realize it's an illusion. This is especially true of so-called document management systems, most of which rely on a combination of Windows Explorer and rules for how to name documents and where to store them that everyone in your firm follows — except when they don't.

### Tabs3 and PracticeMaster Version 17 ... in One Sentence

Launched last month, [Tabs3](#) and [PracticeMaster Version 17](#) is integrated practice management and billing software with a new document management component.

### The Killer Feature

A slew of products claim to have document management but really don't. Classic document management software eliminates human error and saves time through automation.

For example, every document stored in PracticeMaster has a corresponding Document Management Record containing the client, matter, document type, and other fields of your choosing. These profiles enable you to find every brief, contract, deposition, etc. associated with a specific matter. PracticeMaster also provides full-text searching.

You can automatically save documents from Microsoft Office (including email and their attachments). PracticeMaster automatically names and saves these documents using the policies you specify during setup. You can also bulk import documents

during the setup process. The Verify Documents utility identifies documents that have moved or been renamed, possibly incorrectly.

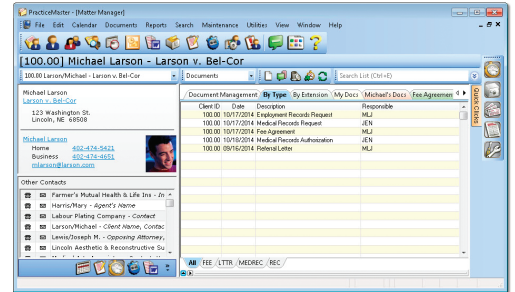
When someone edits a document, you can require them to check it out, which prevents others from editing it. You can also have the software nudge people to check in a document after a specified period of time. Upon check in, PracticeMaster can create a new version. Document comparison technology enables you to generate a redline. Every document has a "History" so that you can see who accessed it and when.

Because PracticeMaster's document management system resides in the same software as the Tabs3 billing system, you can create a time entry from a Document Management Record.

"Law firms that use version 17 of Tabs3 and PracticeMaster will appreciate how easily they can organize their documents and other information, bill for their work, and present it in a manner their clients can understand," Software Technology President Dan Berlin told us.

### Other Notable Features

Continuing with the theme of automation, PracticeMaster's new QuickViews enable you to more easily find information in all areas of the software by creating filters. For example, when viewing contacts, calendar events, documents, etc. a QuickView might list only those items associated with a specific practice area. At the bottom of every list of records you'll find



Smart Tabs for filtering your list even further. You can save QuickViews and Smart Tabs, customize their colors, and share them with others in your firm.

Long known for handling virtually any billing scenario, Tabs3 has enhanced its Split Billing for situations in which two or more clients pay for a matter. Now you can split hours and have the amounts calculated based on predefined rates, use percentages with up to four decimal places to round fees with more precision, display either the pre-split or post-split value on statements along with a summary of what was split, and much more.

### What Else Should You Know?

Notwithstanding its new document management functionality, PracticeMaster also features tight integration with Worldox GX3. In all, PracticeMaster and Tabs3 contains more than 100 new features and improvements to existing features.



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