

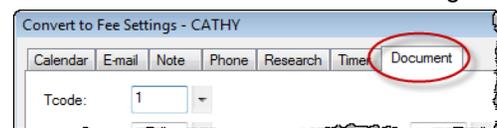
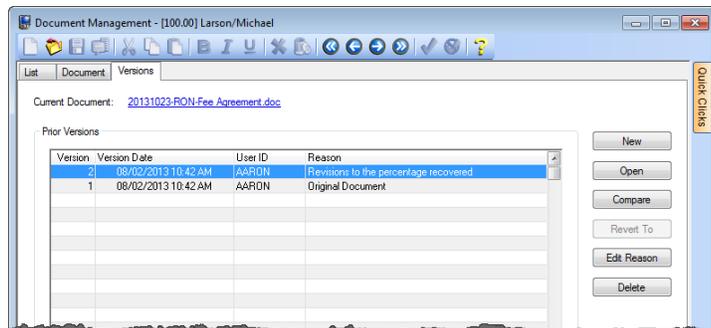
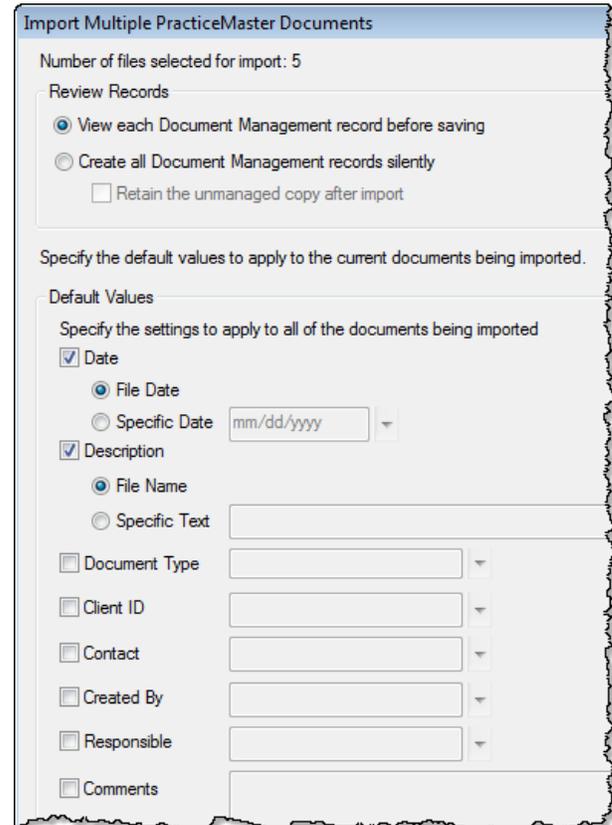
What's New List for Version 17.1 of Tabs3 Billing, PracticeMaster, and Financial Software

PracticeMaster Changes

Document Management

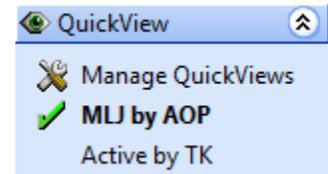
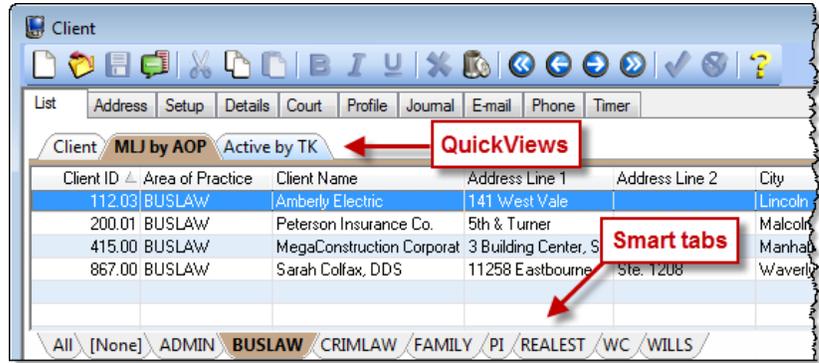
Enhancements to better organize your documents with PracticeMaster include:

- Create a naming convention, and then let PracticeMaster save and name your documents.
 - Specify your firm's naming convention and repository location for all documents.
 - When creating a Document Management record, the name and location can automatically be assigned.
 - Classify and organize your Document Management records using the new Document Type field.
 - Create your own document types such as Letters, Briefs, Motions, Interrogatories, Depositions, etc.
- Automatically save documents to PracticeMaster from Word, Excel, and PowerPoint.
- Save Outlook e-mail attachments as Document Management records.
- Add your existing documents to PracticeMaster.
 - Powerful import functionality lets you import entire groups of documents at one time and automatically organize them in PracticeMaster.
- Check In and Check Out documents to prevent changes by other users while you are working on documents. Checked out documents are marked as "read-only" and cannot be edited by anyone else.
 - View Check In / Check Out History of a specific document.
 - Specify the number of days before notifying users that checked out documents are overdue.
 - View all documents or just overdue documents you have checked out.
 - Optionally require users to check out a document before editing.
- Easily save versions of documents to track revisions.
 - Compare two versions of a document to see changes.
 - Optionally require users to create a new version when checking in a managed document.
- Convert Document Management records to fees.
 - Define default preferences for each user on the new **Document** tab in Convert to Fee Settings.
- New Verify Documents utility identifies files that have been moved or renamed.
 - Schedule the Verify Documents utility to run at any time using a startup option.



QuickViews ***New Feature***

- **QuickViews** combine a filter, column layout, and default sort. This allows you to quickly change the view on the records you see, the columns that are displayed, and the order that records appear—all with a single click.
- New **Smart tabs** allow an additional level of filtering by displaying a row of tabs at the bottom of the list. For example, you can filter the Client file to display only your clients, and display Smart tabs for each Area of Practice.
- QuickViews are accessed in the Quick Clicks pane for each file.
 - The **Manage QuickViews** option opens the QuickView Editor, allowing you to define the QuickView.
- Create and share QuickViews for all users by selecting the **Show for all users** check box.
- The Platinum version provides the fastest QuickView performance.

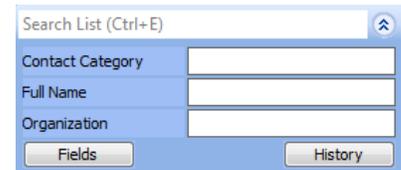


Record Count ***New Feature***

- The status bar now shows a count when multiple records are highlighted on a **List** tab. You can use Ctrl+A to highlight all records in a list.

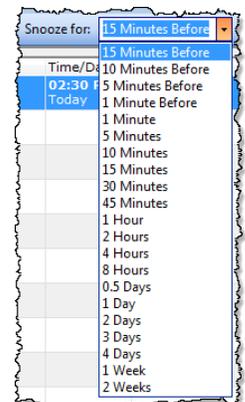
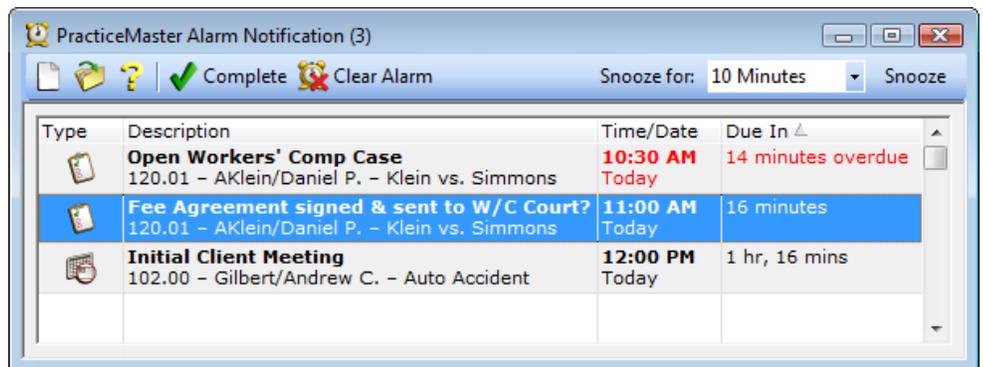
Search Box ***New Feature***

- The new Search Box at the top right corner of the **List** tab on every PracticeMaster file makes it easy to find information. By typing in the Search Box, your List will automatically be filtered. Every field that is shown in the current Column Layout will be searched.
- By clicking on the expand button, you can change which fields to filter your search by, as well as examine and reuse the last 10 searches using the **History** button.



Alarms

- New Alarm Notification window shows all alarms in one window.
- You can select and snooze all alarms at once, or pick and choose which alarms you want to snooze, clear, or mark as complete.
- Different snooze values are now remembered for each individual record.
- Snooze times are now maintained even if you close PracticeMaster.
- You can snooze an alarm for any interval, such as tomorrow, 10 minutes before due, 2 weeks, next month, 8 minutes, etc.
- Use Natural Language to enter an alarm time (e.g., "Tomorrow 3:00 p.m.", "Next week", "Monday", etc.).
- When an alarm is snoozed in PracticeMaster, it is snoozed in Outlook and vice versa. You no longer have to dismiss it in both windows.
- Alarm Notification window includes a new **Due In** column to show how long until the appointment or task deadline (e.g., "1 hr, 15 mins").



- Added the ability to minimize the Alarm Notification window, keeping it open but out of sight.
- You can snooze an alarm for more than 8 hours.
- The Active Alarms window shows which alarms have expired along with alarms set to expire today.

Calendar

- Conflict checking is now performed when dragging and dropping a calendar record in the Graphical Calendar.
- A new combined **Alarm Time** field in the calendar record offers the following features:
 - Use Natural Language to enter an alarm time (e.g., “Tomorrow 3:00 p.m.”, “Next week”, “Monday”, etc.).
 - Allows you to type or select how long until an alarm is displayed, or “None” if no alarm is needed.
 - Set an alarm for more than 9,999 minutes before the due date. This allows you to set an alarm for 2 weeks, 1 month, or even longer before an event.

Document Search

- Optionally specify which users’ documents to search.
- Optionally specify which document types to search.
- Optionally search all versions of documents or just the current version in Document Search and Conflict of Interest.
- Search Document Management documents only, or all linked documents.

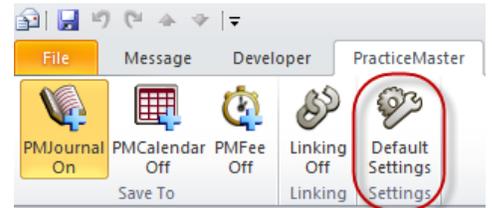
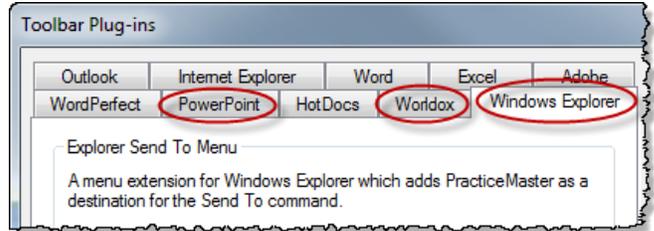
Worldox Enhancements

- Added a PracticeMaster toolbar in Worldox that lets you access matter information and create fee, calendar, and journal records (requires Worldox GX3 latest update).
- Renumbering clients in PracticeMaster, Billing, or Trust Accounting now reassigns Worldox documents for the user’s Profile Group to the new Client ID.
- Added support for integrating inactive client matters (requires Worldox GX2 or later).
- The Worldox Integration window includes two new tabs, **Profile Groups** and **User**, making it possible to ensure that all users integrating with Worldox use the same settings.
 - The **Profile Groups** tab allows you to define the firm-wide settings for the Profile Groups you would like to integrate with.
 - The **User** tab allows you to specify which Profile Group an individual user will be integrating with.
- Added the ability to select additional fields when defining the **Client Field Description** and **Matter Field Description**. These fields allow you to map any PracticeMaster Client field to describe the information that is being sent over to Worldox.
- Added the ability to list or search Worldox documents from any tab in the client editor or Matter Manager. This is done using the **Display Worldox Documents** or the **Search Worldox Documents** options in the **Take Action** menu in Quick Clicks.
- Added the option to restrict Worldox searches to the Profile Group selected for that user. When selected, documents in different Profile Groups will not be searched when a user performs a Document Search in PracticeMaster.

- Added the ability to select a custom Wordox search template on the **User** tab of the Wordox Integration window. Selecting this option adds a **Search Wordox Documents** option to the **Take Action** menu in Quick Clicks for the Client File. This link allows additional criteria to be specified on the search template.
- Improved the performance by only processing changes to integrated fields.

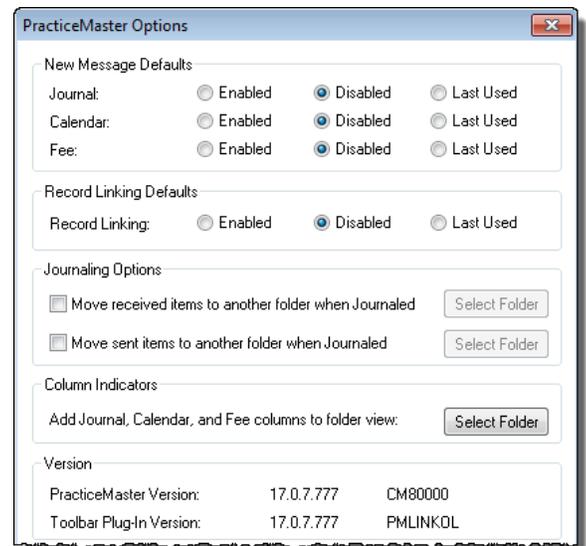
New PowerPoint, Wordox, and Windows Explorer Toolbar Plug-Ins

- Added the following plug-ins, which add functionality to third-party programs (**Maintenance | Integration | Plug-ins**):
 - **Microsoft PowerPoint** – Add a PracticeMaster toolbar in PowerPoint that is used when creating or editing documents so presentations can be easily added to a document management record for case files. You can also create fee, calendar, and journal records while working in PowerPoint.
 - **Wordox** – Add a PracticeMaster toolbar in Wordox that lets you access matter information and create fee, calendar, and journal records.
 - **Windows Explorer** – Add a **Send To PracticeMaster** menu option to Windows Explorer that creates new Document Management records for individual documents or groups of documents.



New Configuration Window for Outlook Plug-In

- Added a new configuration window for Outlook integration with journal, calendar, and fees. This Add-in Options window can be accessed via the new **Default Settings** button or from within Outlook.
 - Easily add the J, C, and F column indicators to any folder in Outlook.
 - Automatically move sent items and received items to another folder when journaled.
 - Set defaults for new messages for journal, calendar, and fees.
 - Set default for record linking.



Journal File

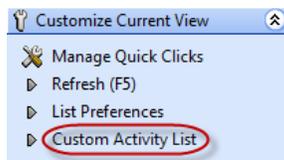
- Added a new **View E-mail in Outlook** option in Quick Clicks that allows you to recreate an e-mail that has been saved to the Journal file. All attachments in the e-mail journal record are included when viewing in Outlook.
- Added a new **Export E-mail as Outlook Msg** option in Quick Clicks that exports e-mail journal records as Outlook Msg files. All attachments in the e-mail journal record are included in the .MSG file.

History Tracking

- Added the ability to resize the View Field History window, thus allowing you to see more of the Old Value and New Value fields. The window size is saved between sessions.

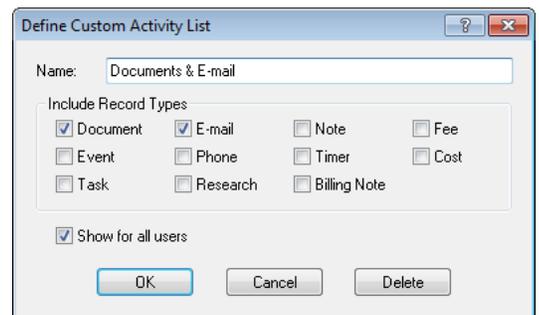
Tooltips in Editor Window

- Hovering over multi-line memo fields displays the entire field in a tooltip, making it easy to see the full e-mail body, fee description, comments fields, etc.



Matter Manager

- Added the ability to create a Custom Activity list for any combination of the following



record types: document, event, task, e-mail, phone, research, note, timer, billing note, fee, and cost. For example, you can create a custom list that shows only document management records and e-mail journal records. Or, you can create a custom list that shows both fees and costs.

Filters

- Improved performance for most filters.

Find and Replace

- Added the ability to search for empty fields when using Find and Replace.

WorkFlows

- Improved performance when running a user activated WorkFlow for multiple records in a list.
- Added the ability to cancel when running a user activated WorkFlow for multiple records in a list.
- Added a **Please Wait** message when running a user activated WorkFlow for multiple records in a list.

Daily Report

- The Daily Report now displays the Day of the Week next to the date when the report is run for a range of dates.

Tab3 Billing Changes

Split Billing ***New Location***

- Show the pre-split value or the split value on statements.
- Include a summary of what was split on statements.
- Split both the **Hours** and **Amount**, or just split the **Hours** and have the amounts calculated for each matter based on rates that have been defined.
- Define split billing percentages with up to four decimal places instead of only two.
- Optionally split fee credits and cost credits.
- Optionally split non-billable transactions and zero amount transactions.
- Split Billing is now configured in the Client using the new **Split Billing** tab.
- Renamed the feature from Split Fee Billing to Split Billing to reflect the enhanced functionality.
- Informs you if a final statement was run for a split client with transactions that have not been split.

| Client ID | Client Name | Work Description | Fee % | Exp % | Adv % |
|-----------|-----------------|--------------------------------|---------|---------|---------|
| 100.00 | Larson/Michael | Larson v. Bel-Cor | 50.0000 | 50.0000 | 50.0000 |
| 120.01 | Klein/Daniel P. | Klein vs. Simmons Construction | 50.0000 | 50.0000 | 50.0000 |

Total %: 100.0000 100.0000 100.0000

| | Fees | Expenses | Advances | Total |
|-----------------|---------|----------|----------|---------|
| Larson/Michael | 1529.88 | 51.75 | 25.00 | 1606.63 |
| Klein/Daniel P. | 1529.87 | 51.75 | 25.00 | 1606.62 |
| | 3059.75 | 103.50 | 50.00 | 3213.25 |

Undo Split Billing ***New Feature***

- A new Undo Split Billing utility lets you reverse the split billing process for individual clients.
- This window shows all of the detail for a split, allowing you to see amounts and percentages for each split matter as well as totals.

Generate Statements

- Specify an e-mail template when running final statements that overrides the clients' normal e-mail template, thus making it easy to use a different e-mail template for reminder statements.

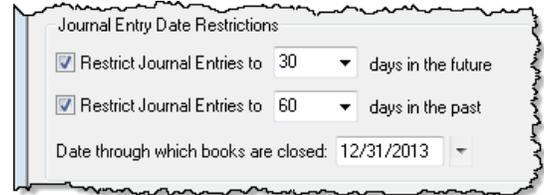
Task Codes & Taskbill

- Added support for using the 2013 Revised UTBMS Expense Code format specified by the LEDES Oversight Committee (LOC). You can now define Expense task codes in Tabs3 Billing and PracticeMaster using "X" as the first character position (i.e., X101, X111, X122, etc.).

General Ledger Software (GLS)

Month/Year-End

- No longer necessary to close each month and year.
- Store unlimited years of journal entries.
- Define a "Closed Date" to ensure journal entries from prior periods are not altered.



GLS Clients

- No longer need to archive clients to retain information for prior years.
- New firm-defined date restrictions for which journal entries can be added or edited.

Bank Reconciliation

- Added ability to reconcile credit card accounts.
- Now easier to cancel a reconciliation.

Chart of Accounts

- Made it easier to manage your accounts by completely redesigning the Chart of Accounts window with a new visual layout that shows account groupings.
- Drag and drop accounts to reorder them in the Chart of Accounts.
- Mark accounts as Inactive.
- Added a new "Credit Card" account type that can be reconciled.
- Automatically add corresponding heading/total accounts to create paired account groupings.
- Added separate Detail and Summary report options for each account.
- Designate accrual accounts for reporting purposes.
- Increased the account description from 30 characters to 50 characters.

| Description | Account Type | Account # | Dept |
|---------------------------------|--------------|----------------|----------|
| Assets | Asset | 1000.00 | 0 |
| Current Assets | Asset | 1010.00 | 0 |
| Cash | Asset | 1100.00 | 0 |
| Operating Account | Bank Account | 1110.00 | 0 |
| Payroll | Bank Account | 1130.00 | 0 |
| Total Cash | Asset | 1199.00 | 0 |
| Client/Employee Advances | Asset | 1200.00 | 0 |
| Client Cost Advances | Asset | 1210.00 | 0 |

Account Information

- Added a new Account Information window that allows for easy analysis of account balance and budget information.
- Easily view Journal Entries for a specific account and period of time.

| Date | Description | Debit | Credit |
|----------------|---------------------------|-----------------|-------------|
| 12/31/2012 | Purchased a new server. | 3,200.00 | |
| 12/31/2012 | Entering Initial Balances | 1,525.00 | |
| Totals: | | 4,725.00 | 0.00 |

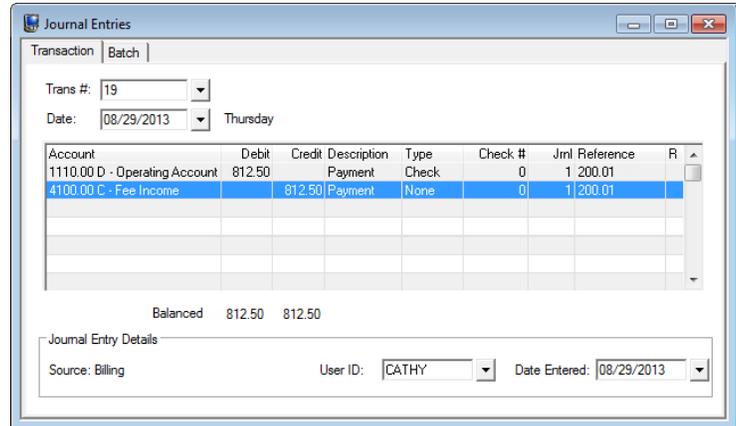
| | 2013 Actual | 2013 Budget | Difference |
|---------------|-------------------|-------------------|--------------------|
| January | 50,506.25 | 62,500.00 | -11,993.75 |
| February | 0.00 | 62,500.00 | -62,500.00 |
| March | 97,564.75 | 62,500.00 | 35,064.75 |
| April | 58,873.50 | 62,500.00 | -3,626.50 |
| May | 63,680.00 | 62,500.00 | 1,180.00 |
| June | 72,980.00 | 62,500.00 | 10,480.00 |
| July | 70,820.00 | 62,500.00 | 8,320.00 |
| August | 267.00 | 62,500.00 | -62,233.00 |
| September | 112,677.50 | 62,500.00 | 50,177.50 |
| October | 66,215.19 | 62,500.00 | 3,715.19 |
| November | 20,812.50 | 62,500.00 | -41,687.50 |
| December | 0.00 | 62,500.00 | -62,500.00 |
| Total: | 614,396.69 | 750,000.00 | -135,603.31 |

Budgets

- Define and maintain budget amounts for multiple years.
- Define a budget for next year without closing the current year first.

Journal Entries

- Streamlined Journal Entry window ensures entries are balanced.
- Store unlimited journal entries—not just three years.
- Enter journal entries for future months without closing the current month first.
- Improved integration with Tabs3 Billing, Accounts Payable, and Trust Accounting requires fewer manual journal entries.
- Increased the journal entry description from 40 characters to 120 characters.
- The **Receipt** and **Receipt Type** fields have been combined into the **Type** drop-down. This provides the ability to specify the type of receipt, including None, Cash, Check, Credit Card, and more!
- Improved data entry window stores balanced journal entries as *transactions* on the new **Transaction** tab. Related transactions due to integration are linked and easily accessible via the new **Batch** tab.



Deposit Slips

- Added the ability to include **EFT** and **Other** receipt types on deposit slips. Previously, deposit slips could only be created for **Cash**, **Check**, and **Client Funds** receipt types (changed in Version 17.1.2.918).

Reports

- No longer limited to reporting on just the current and two prior years.
- Easier to include/exclude accrual figures on reports.
- Optionally select to include commas and cents at the time the report is run.

Recurring Entries

- Enhanced the Recurring Entries window to ensure balanced entries are posted.
- Select which recurring entries to include at the time of posting.

Import Journal Entries ***New Name***

- The Post ASCII Data program has been renamed to Import Journal Entries.
- All items in the GLSASCII.DTA file are now checked prior to importing.
- If any errors are detected in the GLSASCII.DTA file, no journal entries will be imported.
- The GLSASCII.DTA file will no longer be deleted if errors are detected, allowing you to refer to the Import Journal Entries Error Report and correct the errors found in the file.

Post PenSoft Payroll Data

- All items in the GLSPEN.DTA file are now checked prior to importing.
- If any errors are detected in the GLSPEN.DTA file, no journal entries will be imported.
- The GLSPEN.DTA file will no longer be deleted if errors are detected, allowing you to refer to the Post PenSoft Payroll Data Error Report and correct the errors found in the file.

Data File Integrity Check

- Added drill-down capabilities to the Error Report making it easy to load the specified record.

Integration with Default GLS Client

Tabs3 Billing, Accounts Payable, and Trust Accounting integration can only occur with GLS Client 1. Additionally, the default GLS Client is now always GLS Client 1. If you are configured to use a different default client, the conversion program will move the GLS Client and the log file will indicate whether GLS clients have been moved.

Accounts Payable Software (APS) & Trust Accounting Software (TAS)

1099-MISC Forms

- The IRS changed the formatting of their 1099-MISC form for 2013. We updated our program to meet their new field alignment.

Miscellaneous Changes

Update Notification *****New Feature*****

- Automatically notifies managers and designated users when a critical update is available.
- Provides the ability to download updates at any time using the new **Help | Check for Updates** menu option without having to enter additional information.
- You can designate which users will be notified of updates using the new **Check for Software Updates** access right.

PracticeMaster Limits

- Increased the maximum number of fields allowed in a file to 435 fields (*previously 410*).

Receipt Allocation by Invoice setting in Tabs3 Billing

- The conversion program changes the default **Receipt Allocation by Invoice** setting on the **Client Defaults** tab in Customization to be enabled. Additionally, the default setting for new matters is now based on the **Client Defaults** setting instead of the prior matter associated with the same client. These changes ensure that new clients and matters take advantage of the additional reporting options Receipt Allocation by Invoice provides.

Help Improvements

- Clicking the **Help** button or pressing F1 from any report Preview window will now take you to the appropriate help topic for the report you are viewing.
- Similarly, clicking the **Help** button or pressing F1 from any **List** tab in PracticeMaster will take you to the appropriate help topic for the file you are accessing.

Data File Integrity Check & Tabs3 Billing Archive Data Integrity Check

- Added a link to the appropriate Knowledge Base article at the bottom of the Error Report making it easy to find information regarding specific errors.
- Changed the Data File Integrity Check startup option (/DFIC) and Archive Data Integrity Check startup options (/AFIC) when run from the command line to display errors in the log file instead of onscreen, thus allowing batch files to continue executing even if there are errors.

Copy All

- Added the ability to copy **all** records from any list to the Windows clipboard using Ctrl+Alt+C. Although Ctrl+C copies all selected records, there previously was no way to copy all records from lists that did not allow more than one record to be selected. This new Copy All feature works on all lists, and is available in all products.

Platinum Versions

QuickViews

- QuickView performance is accelerated when using the Platinum version. With larger data files and complex sorting, there can be a significant improvement.

Search Box

- Performance of the new Search Box is accelerated when using the Platinum version.

Tabs3 Connect Matter Manager

- Tabs3 Connect users can use any of the new Custom Activity lists defined for the Matter Manager.

Tabs3 Connect Task List

- Added a line for each task in the Task List that includes the Client ID, Client Contact Full Name, and Work Description. If no client is assigned to the task, then the Contact Full Name will show.

New Log Off Users Startup Option

- Added a new /LOG_OFF_USERS startup option for Platinum software that will automatically log off all conflicting users in order to run the Data File Integrity Check or Archive Data Integrity Check.

eNote

- Added a message indicator to the eNote window that indicates whether an eNote has been forwarded or replied to.

Exchange Connector

- The Exchange Connector now integrates with Exchange Server 2013.
- The new **Auto Detect** feature in System Configuration can now detect your Exchange Server name and proxy settings based on the **Administrative E-mail Address** and **Password** fields when configuring the PracticeMaster Exchange Connector.
- Outlook is no longer required to be installed on the Platinum Server when using Exchange Server 2013.

Discontinued Items

PracticeMaster Briefcase

- Starting with Version 17, PracticeMaster Briefcase has been discontinued and is no longer available. Tabs3 Connect can be used for remote access to client and contact information, fee and cost entry, personal and firm-wide calendar, and more.

QuickBooks Integration

- Starting with Version 17, QuickBooks integration will no longer be available with PracticeMaster only. **QuickBooks integration will only be available when Tabs3 Billing is installed.**
- QuickBooks integration using the IIF format is no longer available. Tabs3 only supports integration with QuickBooks using the QBXML format.

DOS Cost Recovery Software

- Starting with Version 17, the DOS Cost Recovery Software programs will be discontinued. The Tabs3 Device Interface program (TBDevice.exe) will replace these utility programs. The DOS Cost Recovery Software programs do not run on 64-bit operating systems and have become obsolete.

WCNVASCV.EXE

- Starting with Version 17, the WCNVASCV.EXE utility program will be discontinued and replaced with the Tabs3 Device Interface program (TBDevice.exe). The format used by WCNVASCV.EXE is included in the Tabs3 Device Interface program.