











PracticeMaster Quick Start Checklist

1.	Install Tabs3 Billing and Synchronize with PracticeMaster  Maintenance Integration Synchronize PM & Tabs3 Bring your Tabs3 clients, contacts, fees, and costs into PracticeMaster. Tip: Run a Data File Integrity Check in Tabs3 before synchronizing.
2.	View Matter Info  File Matter Manager See detailed matter information and launch commonly used features.
3.	Synchronize Your Outlook Calendar  Maintenance Integration Outlook Synchronization Synchronize your PracticeMaster calendar entries into Outlook and vice versa. Tip: Consider setting up a separate Calendar folder in Outlook that is used solely for synchronizing PracticeMaster calendar entries.
4.	Synchronize Your Outlook Contacts  Maintenance Integration Outlook Synchronization Synchronize your PracticeMaster contacts into Outlook and vice versa. Tip: Consider setting up a separate Contact folder in Outlook that is used solely for synchronizing PracticeMaster contacts.
5.	View Calendar  Calendar Weekly Calendar View firm-wide calendar and link calendar entries with clients and contacts. Tip: Customize your Calendar (Calendar Calendar Properties).
6.	Save Email Messages  Maintenance Integration Toolbar Plug-ins Install Outlook Plug-in Journal your Outlook email in PracticeMaster and quickly create calendar and fee entries from your email. Tip: Configure Outlook columns to show whether an email has been journaled.
7.	Check Conflict of Interest  Search Conflict of Interest Search Try out the incredibly fast conflict of interest search in PracticeMaster.
8.	Add Fees  File Open Fee Add fee entries in PracticeMaster. They will automatically sync to Tabs3.
9.	Convert to Fee  File Matter Manager You can convert email, calendar entries, timer records, and phone calls to fees. Tip: Configure your settings (Maintenance Preferences Convert to Fee Settings). Tip: Use the PracticeMaster Timer to create timer records and then convert them to fees.
10.	Resources & Advanced Features  www.Tabs3.com/quickstart Learn about other Resources and Advanced Features such as WorkFlows, Document Assembly, and more in the PracticeMaster Quick Start Guide. Tip: Start with the Quick Guides (R11130 in our Knowledge Base).