Tabs3 Billing Quick Start Checklist

1.	**Customize Tabs3 Billing**	
	Utilities | Customization Configure your client numbering scheme and customize Tabs3 for your firm.	
2.	**Add Timekeepers & Rates**	
	File | Open | Miscellaneous | Timekeeper Add timekeepers and define different billing rates for each timekeeper.	
3.	**Add Clients**	
	File | Open | Client Add clients and contacts to Tabs3. **Tip:** Set default settings for new clients on the **Client Defaults** tab of Customization ***(Utilities | Customization)***.	
4.	**Add Fees & Costs**	
	File | Open | Fee - OR - File | Open | Cost Add fees and costs. **Tip:** Use the **Toggle List** button to view a list of transactions.	
5.	**Run Statements**	
	Statements | Generate Statements Generate draft and final statements for Tabs3 clients. **Tip:** Use Pre-Bill Tracking to track the status of your draft statements and launch your final statements.	
6.	**Update Statements**	
	Statements | Update Statements Update final statements once they have been approved and sent to clients. **Tip:** Make a backup before updating statements.	
7.	**Print Accounts Receivable Report**	
	Reports | Accounts Receivable | Summary A/R Report Run reports after updating statements.	
8.	**Add Payments**	
	File | Open | Payment Add payments upon receipt.	
9.	**Client Manager**	
	File | Client Manager See detailed client information and balances; launch commonly used features and reports. **Tip:** Use the **PracticeMaster** button to launch the Matter Manager.	
10.	**Resources & Advanced Features**	
	www.Tabs3.com/quickstart See easy step-by-step procedures for these tasks and learn where to find more information in the Tabs3 Billing Quick Start Guide. **Tip:** View a list of all available Training Videos ***(Help | Training Videos)***.	

Tabs3 Reliable Software. Trusted Service.

See the companion Tabs3 Quick Start Billing Guide for detailed information at:
www.Tabs3.com/quickstart