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PracticeMaster Quick Start Guide

Tabs3 Billing

PracticeMaster

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PracticeMaster Quick Start Guide

PracticeMaster Getting Started Guide

Congratulations! You've made the decision to work with PracticeMaster. Now, let us show you how to get started and where to go when you need more information.

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Before You Start

Before you can get started, you need to install PracticeMaster.

Tip: If you are getting started with both PracticeMaster and Tabs3 Billing, we recommend starting with Tabs3 Billing first.

Installation

If you have not yet installed PracticeMaster, it's easy to do. Follow the instructions provided in the Installation Guide. The Installation Guide can be accessed at

More Info - Installation
Training Video
• **PracticeMaster Overview**
The Tabs3 Software Installation Guide
• **Tabs3.com/docs**
KB Article R11027 - Installing the Try Before You Buy PracticeMaster License
• **support.Tabs3.com/main/R11027.htm**

Tabs3.com/docs. If you have Tabs3 Billing, you have a try before you buy one-user license of PracticeMaster Basic.

Once installed, you are ready to get started.

Starting PracticeMaster

1. From the Windows Desktop, double-click the PracticeMaster shortcut.
2. The Getting Started wizard will be displayed, allowing you to configure the Tabs3 Software.

Setting Up PracticeMaster

The Guided Setup will walk you through configuring the Tabs3 Software after first installing the Tabs3 Software or when adding licenses of new programs.

When first installing the Tabs3 Software, you will be prompted to enter details about the firm and your user information, which will be used to configure your login account. Depending on the software being installed, you will also be

More Info - Customization
Help Topics
• **Press F1 in the Customization window** • **Click the Index tab and type "Client ID"**
The Tabs3 Software Administrator Guide
Tabs3.com/support/docs.html

prompted to determine the Decimal Places for your Key Type (by how many matters you have for your clients), configure bank information, and create a timekeeper.

After completing the Guided Setup, you will automatically be logged in using the information you provided, and the Tabs3 Software will be ready to use.

You can set up users in System Configuration and customize your configuration options after the Guided Setup is complete.

Getting Data into PracticeMaster

Let's start with getting your data into PracticeMaster.

Step 1 – Tabs3 Billing Clients

First, let's get your Tabs3 Billing clients into PracticeMaster. Assuming you've been using Tabs3 Billing and you've just installed PracticeMaster, all you need to do is synchronize the two. When synchronizing, the following data will automatically be brought over from Tabs3 Billing into PracticeMaster: clients, contacts, work-in-process fees and costs, client notes, and billing files (i.e., timekeepers, transaction codes, categories, task codes, locations, and text macros). As an option, you can also bring over archived fees and costs. The following procedure needs to be done only once by one user. We recommend that your PracticeMaster administrator run the initial synchronization of PracticeMaster and Tabs3 Billingas follows.

► **Synchronizing Tabs3 Billing with PracticeMaster**

1. Start Tabs3 Billing.
2. From the **Utilities** menu, click **Data File Integrity Check**. You may have an error 500, which is expected. This error indicates that PracticeMaster and Tabs3 are not synchronized. Proceed only if the check has no errors, or only has an error 500.
3. From the **Maintenance** menu, select *Integration | Synchronize Tabs3 and PracticeMaster*.
   Tip: Synchronizing billed fees and costs is optional. If you've been using Tabs3 Billing for several years, you may want to clear the **Convert Tabs3 archive records to PracticeMaster fee and cost records** check box. Although synchronizing all billed fees and costs allows them to be included in conflict checking, it also affects the time it takes to run certain utilities such as Data File Integrity Check.
4. From the **Utilities** menu, run a **Data File Integrity Check** again to verify the error 500 is no longer present.

Now that Tabs3 Billing and PracticeMaster are synchronized, whenever you add or edit a client, contact, fee, or cost in either program, the changes will automatically mirror to the appropriate files in the other system.

Adding Clients

Clients are added to PracticeMaster via the Client program. When you add a client, a contact record is created for the individual or organization. Contact records can be used by other clients and matters.

- From the **File** menu, select *Open | Client*.

Tip: When entering information for a potential client, enter the information in a Contact record. Later, when the contact becomes a client, in the Contact window, use the **Create Client** option in Quick Clicks to create a new client record.

Tip: If you are not using Tabs3, other options may be available for importing client information from other software. Contact your PracticeMaster consultant, or Tabs3 Support at (402) 419-2210, to discuss other options.

More Info – Clients
Help Topics
Press F1 on any tab in the Client window,   **Click the Index tab and type Clients**
Training Video
Getting Started with Clients
KB Article R11130 – PracticeMaster Quick Guides – Contacts
support.Tabs3.com/main/R11130.htm

Step 2 – Matter Manager

The Matter Manager is a feature that attorneys and paralegals will use often. The Matter Manager shows detailed information for a client's matters and lets you customize and launch the most commonly used programs. You can see all contacts and activity, convert transactions to fees, view Tabs3 billing information, and more.

<table>
<tr><td colspan="2">More Info – Matter Manager</td></tr>
<tr><td>Help Topics – Press F1 in the Matter Manager window</td></tr>
<tr><td>PracticeMaster Quick Guides – Matter Manager</td></tr>
<tr><td>• Tabs3.com/docs</td></tr>
<tr><td>KB Article R11403 – All About the PracticeMaster Matter Manager</td></tr>
<tr><td>• support.Tabs3.com/main/R11403.htm</td></tr>
</table>

▶ **To open the Matter Manager, do one of the following:**

- From the **All Actions** section of the **Home** page, click the **Matter Manager** icon.
- From the **File** menu, select **Matter Manager**.
- Press Ctrl+M.

Integrating Outlook Calendar and Contacts

Steps 3 and 4 of this document walk you through synchronizing calendar entries and contacts between Outlook and PracticeMaster. Before proceeding, however, it is important to plan how you want to implement the integration. For example, if you have three attorneys who all want to synchronize their smartphones with PracticeMaster via Outlook, you will need to carefully consider how to implement this. Otherwise, you could end up having three or four different records for each contact in PracticeMaster, making it time consuming to

clean up. It is much easier to implement synchronization for one attorney at a time, and clean up contact information before synchronizing the next attorney's information.

We strongly recommend reviewing the **Outlook Integration Guide** before synchronizing the first time. Specifically, the "Getting Started" and "Best Practices" sections of the Outlook Integration Guide include numerous guidelines to consider when planning the implementation of Outlook synchronization. Because each firm's situation and requirements are different, it is important to plan for this implementation. For example, some of the questions you will want to ask include:

- Do you want *calendar entries* to synchronize only from PracticeMaster to Outlook (i.e., one-way integration)? Or do you want *calendar entries* to synchronize from PracticeMaster to Outlook *and* from Outlook to PracticeMaster (i.e., two-way integration)?

> **More Info – Outlook Integration**
>
> **Help Topics – Press F1 in the Outlook Synchronization window**
>
> **KB Article R11400 – Outlook Integration Guide**
>
> - **support.tabs3.com/main/R11400.htm**
>
> **KB Article R11366 – Configuring PracticeMaster/Microsoft Outlook Calendar & Contact Integration**
>
> - **support.tabs3.com/main/R11366.htm**
>
> **KB Article R11402 – PracticeMaster & Microsoft Outlook Calendar & Contact Integration FAQ**
>
> - **support.tabs3.com/main/R11402.htm**

- Do you want *contacts* to synchronize only from PracticeMaster to Outlook (i.e., one-way integration)? Or, do you want *contacts* to synchronize from PracticeMaster to Outlook *and* from Outlook to PracticeMaster (i.e., two-way integration)? Do you only want certain contacts to synchronize? If so, you can set up advanced filters for each user to designate which contacts to synchronize.

- Do you want synchronization to be automatic or manual? Most firms prefer automatic.

- Do you want personal *calendar entries* from Outlook in PracticeMaster? If not, enter your personal calendar entries in an Outlook folder other than the folder specified for integration.

- Do you want personal contacts from Outlook in PracticeMaster? All contacts can be seen by all PracticeMaster users. If not, select the **Private** check box in the Outlook record and clear the **Include private Outlook contacts** check box on the **Contacts** tab of the Outlook Synchronization window.

Additionally, it is important to review the differences in how information is treated. The **Outlook Integration Guide** includes information regarding these differences.

Important Tips: Before you perform your first synchronization, keep in mind that calendar events that span multiple days *must* be entered in PracticeMaster as multiple single-day events. Additionally, recurring events entered in Outlook do not synchronize to PracticeMaster; therefore, recurring entries *must* be entered in PracticeMaster using the Recurring Date feature.

After reviewing the **Outlook Integration Guide**, we recommend contacting your PracticeMaster consultant, or Tabs3 Support at (402) 419-2210, with any questions you have before proceeding.

Step 3 – Outlook Calendar Entries

Now, let's get your calendar entries from Outlook into PracticeMaster. PracticeMaster classifies calendar entries as events and tasks, just like Outlook.

Let's configure the calendar integration.

▶ **Configuring and Synchronizing Outlook Calendar Integration**

1. Start PracticeMaster.
2. From the **Maintenance** menu, select *Integration | Outlook Synchronization*.
3. Click the **Calendar** tab.
   a. Select **PracticeMaster to Outlook** to add PracticeMaster calendar entries to Outlook, and select either Automatic or Manual.
   b. Select **Outlook to PracticeMaster** if you want calendar entries from Outlook added to PracticeMaster, and select either **Automatic** or **Manual**.
   Tip: Decide if you want calendar entries deleted in Outlook also deleted in PracticeMaster. Some firms do not allow this because it is too easy for someone to accidentally delete a critical calendar entry in Outlook and then have it also deleted in PracticeMaster. Leave the **Allow deletions in PracticeMaster** check box cleared if you do not want Outlook deletions made in PracticeMaster.
   c. Under **Record Type**, select whether you want to synchronize events, tasks, or both. Then click the corresponding **Select Folder** button to specify the calendar folder with which you want to synchronize.
   Tip: PracticeMaster events typically integrate with the Outlook Calendar folder. However, you may want to consider setting up a special folder in Outlook that is used solely for synchronizing PracticeMaster calendar entries. This makes it easy to keep the PracticeMaster calendar entries separate from personal calendar entries.
   d. Select any other desired options.
4. Click the **Synchronization Options** tab.
5. Under Manual Synchronization, click **Sync Now** to perform the initial calendar synchronization.
   a. You will be asked if you want to save the changes.
   b. Click **Yes**.

Tip: After synchronizing calendar entries from Outlook, start PracticeMaster and add the client ID to the client-related calendar entries.

Step 4 – Outlook Contacts

Next, let's get your contacts from Outlook. As with calendar entries, you need to decide how you want your contacts to integrate. Integration of contacts between PracticeMaster and Outlook is extremely flexible, allowing you to use different criteria for each user that integrates with Outlook. PracticeMaster will include any clients and contacts from Tabs3.

Let's configure the contact integration.

▶ **Configuring and Synchronizing Outlook Contact Integration**

1. Start PracticeMaster.

2. From the **Maintenance** menu, select *Integration | Outlook Synchronization*.

3. Click the **Contacts** tab.
   a. Select **PracticeMaster to Outlook** to add PracticeMaster contacts to Outlook, and select either **Automatic** or **Manual**.

   b. Select **Outlook to PracticeMaster** if you want contacts from Outlook added to PracticeMaster, and select either **Automatic** or **Manual**. If you're not sure at this time, you can enable this feature later.

   c. In the **Synchronization Options** section, click the **Select Folder** button to specify the contact folder with which you want to synchronize.
   Tip: When first starting to synchronize PracticeMaster and Outlook, consider setting up a separate folder in Outlook that is used solely for synchronizing PracticeMaster contacts. This prevents PracticeMaster/Tabs3 contacts from being combined with your Outlook contacts. You may have hundreds or thousands of contacts in Tabs3 and PracticeMaster that you want kept separate from your other Outlook contacts.
   Tip: You can set up advanced filters for each user to designate which contacts to synchronize.

   d. Select any other desired options.

4. Click the **Synchronization Options** tab.

5. In the **Manual Synchronization** section, click **Sync Now** to perform the initial contact synchronization.
   a. You will be asked if you want to save the changes.

   b. Click **Yes**.

Tip: Review your contacts. Open the Contact file in PracticeMaster by selecting *File | Open | Contact*.

Tip: If synchronization requires user intervention, an "Outlook Synchronization Suspended" message will be displayed in red in the task bar at the bottom of the PracticeMaster window. Click the message to resolve the issue. Read more about suspension in the **Outlook Integration Guide**.

Wrapping Up Outlook Integration

In the previous steps, we started the initial synchronizations by clicking the **Sync Now** button. However, PracticeMaster can be configured to perform a periodic synchronization that occurs when you start PracticeMaster and at a set interval, thus eliminating the need to manually synchronize data. After performing the initial synchronizations, go back into Outlook Synchronization.

1. From the PracticeMaster **Maintenance** menu, select *Integration | Outlook Synchronization*.
2. Click the **Synchronization Options** tab.
3. Verify that the **Periodically run synchronization** check box is selected.
4. In the **Require confirmation** check box, change the number of records that require confirmation to a reasonable number for which you would want to confirm the changes before they are committed, such

as 20 or 30, for example. Otherwise, leaving this number set to 1 will display the confirmation window each time a periodic synchronization is started when there are entries that need synchronized, thereby allowing you to review all pending changes before the synchronization occurs.

5. Click **OK**.

Now that the initial setup is done, let's take a look at the various PracticeMaster features that you will want to use right away.
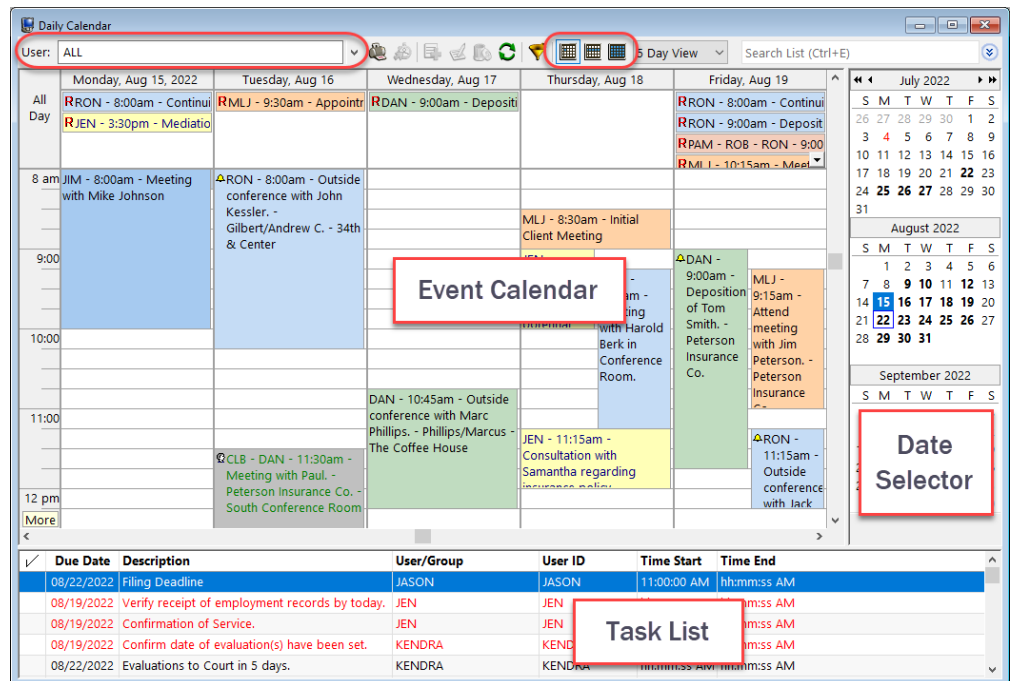
Features

Although PracticeMaster has many features, we will show you just a few to help you get started right away.

Step 5 – Calendar

The PracticeMaster Calendar is probably one of the first features that firms will use. Unlike the calendar in Outlook, you can easily associate calendar entries with clients and contacts. Use the following to take a quick tour of the calendar.

▶ **Calendar Quick Tour**

1. From the **Calendar** menu, select **Daily Calendar** to open the calendar.
2. In the toolbar at the top, click [icon] to view a weekly calendar. Click [icon] to view a monthly calendar. Click [icon] to return to the daily calendar.
3. In the **User** field at the top of the calendar, click the drop-down arrow to select whose calendar you want to view.
4. Using the Date Selector to the right side of the

calendar, click a different day in a different month to easily change which day is shown.
5. From the **Calendar** menu, select **Calendar Properties**. This window is where each user can configure his or her properties. Click on each tab to see the various options.
6. Read the **Calendar Quick Guide**, as listed in the following More Info table. The **Calendar Quick Guide** provides an excellent introduction to the PracticeMaster calendar.

Just like Outlook, calendar entries are classified as Events (i.e., appointments) or Tasks.

More Info – Calendar
Help Topics – Press F1 in the Calendar window and Calendar Properties window
Calendar Quick Guide – KB Article R11130
• **support.Tabs3.com/main/R11130.htm**
Administrator Guide – Setting Up PracticeMaster section
Tabs3.com/docs

Step 6 – Journaling Email Messages

You can journal any email message to PracticeMaster while using Outlook. This is done using the Outlook Toolbar Plug-in. Clicking the PM Journal button on the toolbar opens a journal record with the email message and any attachments, allowing you to assign the matter. Once journaled, you can easily see all email communications for a specific matter, regardless of who sent or received the email in Outlook.

All users in your firm can easily install the Outlook Toolbar Plug-in.

▶ **Installing the Outlook Toolbar Plug-in**

1. From the **Maintenance** menu, select *Integration | Toolbar Plug-ins*.
2. On the **Outlook** tab, click **Install Outlook Plug-in**.

In addition to journaling email messages while in Outlook, you can also quickly create a calendar entry or fee entry from any email message using the **PM Calendar** and **PM Fee** buttons on the Outlook Toolbar.

The Outlook Toolbar Plug-in makes it easy for PracticeMaster to be your central repository for all client email communications.

More Info – Journal
Help Topics – Press F1 in the Toolbar Plug-ins window
Outlook Plug-in Quick Guide – KB Article R11130
• **support.Tabs3.com/main/R11130.htm**

Step 7 – Conflict of Interest Search

Conflict of Interest searching in PracticeMaster is lightning fast. Search contacts, appointments, email messages, documents, and meeting notes. In just one click, you can access the details of any conflict. To open a Conflict of Interest search window, select **Conflict of Interest Search** from the **Search** menu.

More Info – Conflict of Interest
Help Topics – Press F1 in the Conflict of Interest Search window
KB Article R11091 – Comparing Tabs3 & PracticeMaster Conflict of Interest
• **support.Tabs3.com/main/R11091.htm**
KB Article R10515 – Technical Info on PracticeMaster Conflict of Interest
• **support.Tabs3.com/main/R10515.htm**

Step 8 – Fees

Fees entered in PracticeMaster automatically integrate to Tabs3. Many attorneys will perform their data entry in PracticeMaster.

▶ **To open the Fee window, do one of the following:**

- From the **File** menu, select *Open | Fee*.
- Press Ctrl+Shift+F.

A list of fees is shown with a snapshot of the highlighted fee.

More Info – Fees
Help Topics – Press F1 in the Fee window
Fee Entry Quick Guide – KB Article R11130
• **support.Tabs3.com/main/R11130.htm**

▶ **To view fees for a specific client:**

1. From the **File** menu, select *Open | Client*.
2. Click the **Fee** tab.

Recap of Hours

The Recap of Hours window shows the cumulative billable and non-billable hours and amounts for the specified timekeeper on any given day, and can optionally include Journal records with timers that have not yet been converted to fees. This makes it easy for timekeepers to see whether any time entries are missing.

More Info – Recap of Hours
Help Topics – Press F1 in the Recap of Hours window
Training Video
• **Using the Recap of Hours**

- On the **Dashboard** tab of the Home page;
- From the **File** menu, select *Recap of Hours*; or
- On the PracticeMaster Task Bar, click the **Recap of Hours** button.

The first time you open the Recap of Hours window, you will be prompted to select the Timekeeper whose hours you want to view. You can select a different timekeeper by clicking the ⚙ icon.

Step 9 – Convert to Fee

PracticeMaster makes it easy to convert calendar entries, emails, timer records, and phone calls to fees. You can do all of this in the Matter Manager as well as other areas. To get started, open the **Convert to Fee Settings** program.

Convert to Fee Settings

Because each user may want different defaults for the Fee window when converting to fees, you can configure your own defaults. To access the Convert to Fee Settings program, select *Maintenance | Preferences | Convert to Fee Settings*.

Each tab in the Convert to Fee Settings window lets you designate your own defaults for each type of record that can be converted to a fee entry (i.e., Calendar, Email, Note, Phone, Research, and Timer).

More Info – Convert to Fee
Help Topics – Press F1 in the Convert to Fee Settings window
Fee Entry Quick Guide – KB Article R11130
• **support.Tabs3.com/main/R11130.htm**

▶ **Converting to Fee Using Matter Manager**

1. From the **File** menu, select **Matter Manager**.
2. Select **All Activity** in the toolbar drop-down list.
3. Each billable transaction that has not yet been billed will have a ⏱ icon in the **Convert** column. Clicking the icon displays a Fee window allowing you to create a fee. Once created, the icon is removed from the column, making it easy to see which items have and have not been converted to fee.

▶ **Converting to Fee Using Calendar**

1. From the **Calendar** menu, select **Weekly Calendar**.
2. Right-click any calendar item and select **Convert to Fee**. A Fee window will be displayed allowing you to create a fee.

▶ **Converting Journal Records to Fee**

Emails, phone calls, notes, and research tasks are all stored in the Journal File.

1. From the **File** menu, select *Open | Journal*.
2. Do one of the following:
   - Double-click or highlight any record in the **List** tab. In the Quick Clicks pane, under **Take Action**, select **Convert to Fee**.
   - Right-click any record in the **List** tab. Select **Action** and then **Convert to Fee**.

Tip: You can also convert journal records to fees while in the Client file via the **Journal** tab using similar methods.

Tip: You can set up a filter to show only your journal records.

▶ **Use the PracticeMaster Timer to Create Timer Records**

Use the PracticeMaster Timer to create timer records to track your activity throughout the day. The timer is easy to use and allows you to easily switch back and forth between tasks.

1. From the **File** menu, select **Timer**.
2. Click the button to add a new Time Task to the Timer window. The timer will be started and a new journal record will be displayed, allowing you to specify the Client ID or Contact if desired, as well as record any notes. You can use Ctrl+S to save the record now or later.
3. In the Timer window, click the button to stop the timer; click the button to start the timer. Double-clicking the task itself will open the timer record and allow you to edit the Description and assign a Client ID.

Tip: Right-click in the Timer window and select **Preferences** to change the default settings for the user.

▶ **View Your Timer Records**

Use the Visual Timer Display to view your timer records.

1. From the **File** menu, select **Visual Timer Display**.
2. In the upper-left corner, specify your User ID in the **User** field.

▶ **Converting Timer Records to Fees**

The Process Timer Records program is used to convert timer records to fees, on a weekly basis for example. The program can be accessed by clicking the **File** menu and selecting **Process Timer Records**.

More Info – Timer
Help Topics – Press F1 in the Timer window, Visual Timer Display window, Process Timer Records window
Timer Window Quick Guide – KB Article R11130
• **support.Tabs3.com/main/R11130.htm**

Advanced Features

This section provides you with information regarding advanced features found in PracticeMaster.

Areas of Practice

You can set up separate Areas of Practice (AOP) for the various types of law practiced. Each Area of Practice has separate files for tracking unique information. For example, you might have a Family Law area of practice, a Business Law area of practice, and a Criminal Law area of practice.

More Info – Areas of Practice
Help Topics – Look up Area of Practice in the Index
Customizing PracticeMaster Guide
Tabs3.com/docs

- The Family Law area of practice might have separate files for Assets, Debts, Spouse Information, Income, Expenses, Children, etc.
- A Business Law area of practice might have separate files for Board of Directors, Shareholders, Financial Institutions, Signatories, etc.
- A Criminal Law area of practice might have files for Witnesses, Prior Convictions, Bonds, Plea Bargains, etc.

Document Management

When PracticeMaster organizes your firm's documents, it's easy to find them again. Document management automatically names your files, associates your documents to specific clients or matters, and automatically stores them in the appropriate place every time you save a file. You can easily see a list of documents for any client or area of practice, or all versions of a document that you have created for different clients. You can check documents out so that no one else can edit it and then check it back in when you're done. PracticeMaster also retains previous versions of each document so you can copy a paragraph from an old version if you need to.

More Info – Document Management
Help Topics – Look up Document Management in the Index
Document Management Guide – KB Article R11572
support.Tabs3.com/main/R11572.htm
KB Article R11571 – Document Management FAQs
support.Tabs3.com/main/R11571.htm

Document Assembly

PracticeMaster provides document assembly capabilities using either the built-in Word Document Assembly feature or HotDocs document assembly software. Once PracticeMaster is implemented, using Document Assembly can greatly improve the efficiency with which your standard legal documents are created. Most firms implement document assembly by coding their most commonly used forms and documents first.

More Info – Document Assembly
Help Topics – Look up Word Document Assembly in the Index
KB Article R11015 – How to Start a New Word Document Template
support.tabs3.com/main/R11015.htm

WorkFlows

WorkFlows can have a huge impact on a firm's daily operation by automating specified tasks and making sure things do not fall between the cracks. For example, a WorkFlow could be designed to automatically generate a thank you letter, create a follow-up calendar entry, and send an email to the billing clerk whenever a new client is added to the system. WorkFlows are extremely powerful and can be customized to match your firm's workflow and way of doing things.

| More Info – WorkFlows |
|---|
| **Help Topics – Look up WorkFlows in the Index** |
| **KB Article R11307 – All About WorkFlows** |
| **support.Tabs3.com/main/R11307.htm** |
| **WorkFlows Guide** |
| **Tabs3.com/docs** |

Resources

This Getting Started Guide provides you with the information you need to start using the software. There are many other resources available to help you learn the software.

Training Videos

Tabs3 Software include numerous training videos to help you learn the software. Training video libraries can be accessed via the software from the **Help | Training Videos** menu option.

Help

Help is installed with the software and is easily accessed by pressing F1, by clicking the button, or by selecting the **Help | Help Topics** menu option. Help includes detailed information regarding specific programs. Clicking the button opens Help for the window you are currently using. Many times, reading the appropriate Help topic may be the fastest way to find your answer.

PracticeMaster Guides and Report Pack

There are multiple PracticeMaster guides and a PracticeMaster Report Pack installed with the software in PDF format. Shortcuts are created during installation. From PracticeMaster, select **Help | Documentation** for a list of all available Tabs3 Software Documentation. The guides include information on basic setup and use of the software. PracticeMaster has dozens of reports and the PracticeMaster Report Pack makes it easy to see examples of each report. Many firms will print this Report Pack as a reference guide for the various reports to help familiarize them with what is available. The guides and Report Pack can also be accessed via our website at **Tabs3.com/support/docs.html**.

Knowledge Base

An extensive Knowledge Base with advanced information is available for Tabs3 Software users. The Knowledge Base contains information on Error Troubleshooting, Networking & Windows Issues, "How To" articles, and product-related articles. You can access the Knowledge Base via the software from the *Help | Internet Resources | Knowledge Base* menu option or from your Internet browser at **support.Tabs3.com**.

For example, as a new PracticeMaster user, you may find it necessary to add new fields to a file for tracking information unique to your firm. Knowledge Base Article **R11001**, "How to Add New Fields to PracticeMaster Files and Form Layouts," provides step-by-step instructions for these common procedures.Although the Help provided with the software also includes much of this information, you may find that the comprehensive focus of many Knowledge Base articles may be quite helpful for certain subjects.

Tabs3 Support

Tabs3 Software provide some of the best support in the industry. Service to our customers is extremely important to us—so much so that our motto is:

> *Reliable software. Trusted service.*

Support is provided at no charge with a maintenance plan and is available from 8:00 a.m. to 5:00 p.m. Central Time, Monday through Friday. If you have any questions, please feel free to call our Tabs3 Support staff at (402) 419-2210. Email support can be requested via **Tabs3.com/support**.

Tabs3 Consultants

Tabs3 Software is available through a national network of over 250 consultants. Those consultants are small independent firms that specialize in the sales, installation, training and support of billing, financial, and practice management software for law firms. By having consultants service all 50 states, you can work directly with a local person familiar with Tabs3 Software, who can provide personalized on-site installation, training, and support services. Visit our Web site at **Tabs3.com/find-a-consultant** for a consultant near you or contact our Sales staff at (402) 419-2200.

Thank you for choosing Tabs3 Software. We look forward to serving your practice management and billing needs with reliable software and trusted service for many years to come. Let us know how we can help you get started with Tabs3 Software.