Tabs3 Cloud Quick Start Checklist

1. Download & Install the Duo Mobile App on your phone



Note: For security reasons, Tabs3 Cloud requires Duo for multi-factor authentication.

You will set up your account in a bit.

2. Set your Tabs3 Cloud Password



Use the link in Step 2 of the "Tabs3 Cloud Invitation" email we sent to you. --or--

Go to <u>passreset.tabs3.cloud</u> and enter your email address and use the reset link.

3. Register your Tabs3 Cloud user with Duo



Visit <u>app.tabs3.cloud/register</u> to register your Tabs3 Cloud user with Duo.

- You will need your email address and the password you just set in Step 2.
- Optionally visit <u>tabs3.com/Tabs3CloudMFA</u> to watch a short video on setting this up.

4. Decide how you want to access Tabs3 Cloud

Note: The first login of the day tends to take a little longer for the software to launch.



Using a Web Browser - Go to: app.tabs3.cloud/login and enter your email address and password.

Pros:

- Don't need to install any software on your workstation.
- Works better if you have high-resolution displays.

Notes:

- If your browser blocks popups, you may be unable to access Tabs3 Cloud. Most browsers show an icon in the address bar when popups are blocked.
- You may be prompted to allow camera access when using Tabs3 Cloud, but it is not required.
- For instructions, see the <u>Accessing your Local Drive</u> section in KB article R11946.



Using Citrix Workspace - First install Citrix Workspace on your workstation <u>click here</u> for instructions.

Once Citrix Workspace is installed from a web browser go to: app.tabs3.cloud/workspace and enter your email address and password.

Pros:

- Behaves more like a Windows desktop application.
- Access to all local printers.
- Direct access to files on your local computer.
- Can copy and paste from Tabs3 DropBox.
- Better PracticeMaster Calendar Alarms notifications.

Notes:

• After entering your email and password, an .ICA file will download automatically to launch Tabs3 Software. If it doesn't, click the Tabs3 Billing icon.

5. Configure Outlook - If you have a Microsoft 365 E3 or E5 account



- In Tabs3 Billing, from the Quick Launch, search for and select Open Outlook.
- Follow the onscreen instructions.

