Tabs3®
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Billing PracticeMaster® Financial

Statement Formatting Guide

Tabs3.com

Tabs3 Billing Statement Formatting Guide

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Introduction

One of Tabs3 Billing's most powerful features is the flexibility to customize how your statements look when generated for each client. Configuration of the statement format occurs at various levels. These levels include the following:

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Purpose of Guide

The Tabs3 Billing Statement Formatting Guide covers the various options for customizing your billing statement to look the way you want it to look. It includes information on mailing and e-mailing statements, designing the statement layout, changing the way information is formatted, and more.

A separate ***Statements Guide*** includes information for how to generate statements. Additional guides for other software features are also available on our Web site at:

Tabs3.com/support/docs.html

Tabs3 Billing Customization

The first level of defining the statement format can be found in Tabs3 Billing Customization. These options are firm-wide and affect all clients.

Setting Up Tabs3 Billing Customization

Menu: ***Utilities | Customization***
Task Folders: ***Setup | Customization***

The Customization tabs we will be looking at include the **Main** tab, **Options** tab, **Rates** tab, and **Client Defaults** tab.

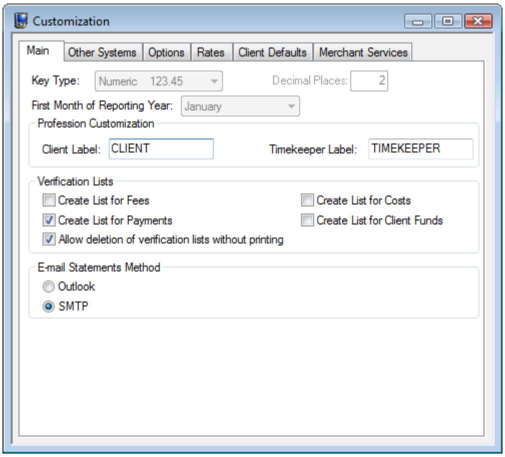

*Figure 1, Customization - **Main** tab*

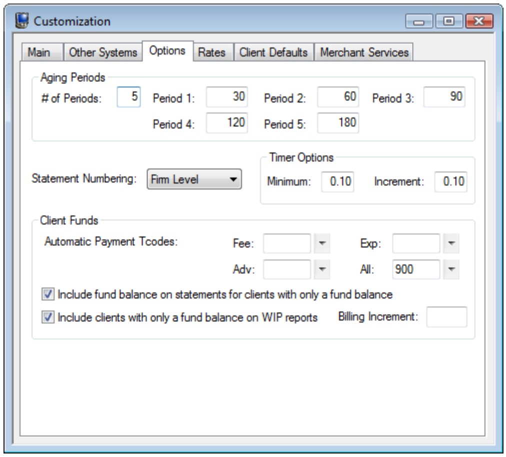

*Figure 2, Customization - **Options** tab*

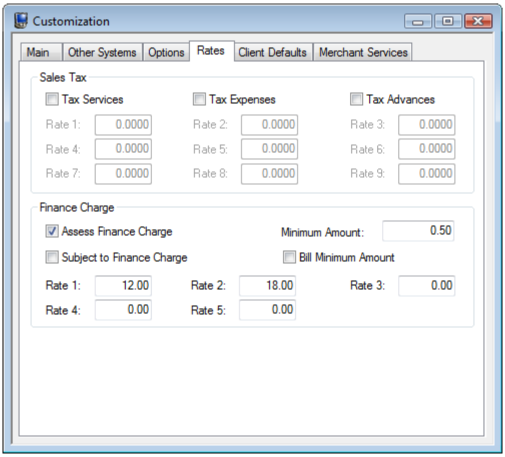

*Figure 3, Customization - **Rates** tab*

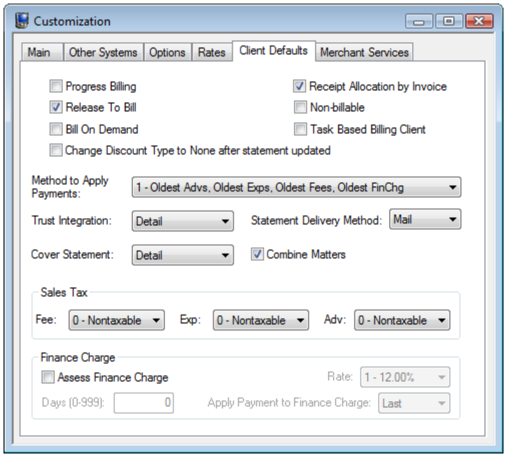

*Figure 4, Customization - **Client Defaults** tab*

Main tab	The **Main** tab allows you to select whether e-mail statements will be sent via Microsoft® Outlook® or an SMTP server.
Options tab	The **Options** tab allows you to define your aging periods and also allows you to specify if statement numbering will be implemented at the firm level or the client level.
Rates tab	The **Rates** tab includes information regarding sales tax and finance charge.

- You can specify if you want sales tax charged for fees, expenses, or advances. Up to nine different sales tax rates can be defined. The sales tax feature in Tabs3 Billing is very sophisticated, allowing you to specify whether or not individual transactions will be taxed.
- The **Rates** tab can also be used to define whether you want a finance charge assessed, if the finance charge is subject to a finance charge, and if you want to assess a minimum finance charge. Up to five different finance charge rates can be defined.

Client Defaults tab

The **Client Defaults** tab allows you to select the default settings for new clients.

Statement Customization

The next level of defining the statement format can be found in Statement Customization. Statement Customization allows you to define many additional firm-wide statement formatting options.

Setting Up Statement Customization

Menu: ***Statements | Statement Setup | Customization***

Task Folders: ***Statements | Statement Setup | Statement Customization***

Statement Customization includes the following tabs:

- Options
- Terminology
- Headings
- Cover Stmt
- Months

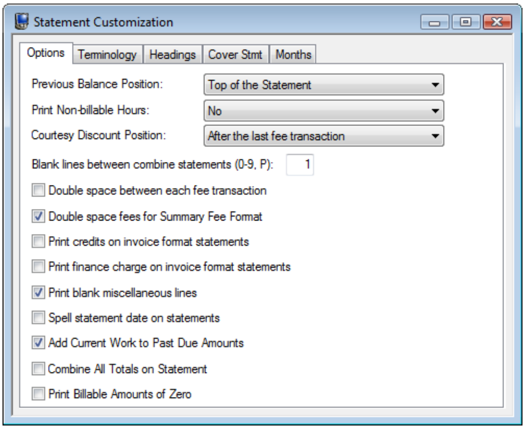

Figure 5, Statement Customization
Options *tab*

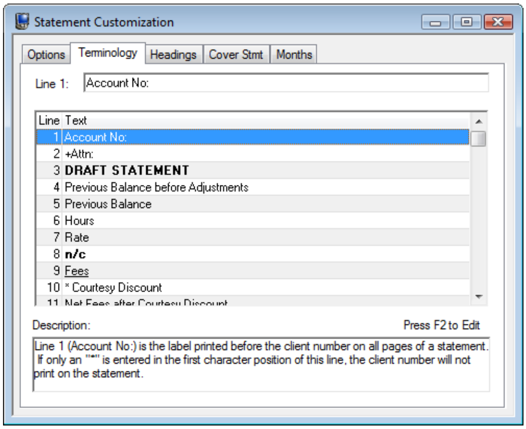

Figure 6, Statement Customization
Terminology *tab*

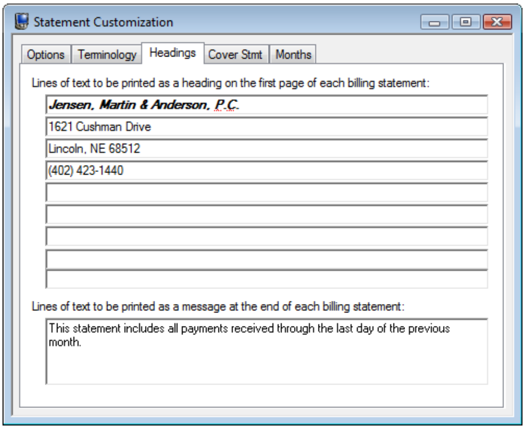

Figure 7, Statement Customization
Headings *tab*

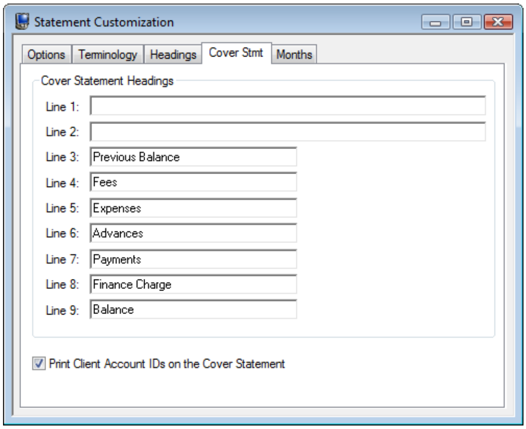

Figure 8, Statement Customization
Cover Stmt *tab*

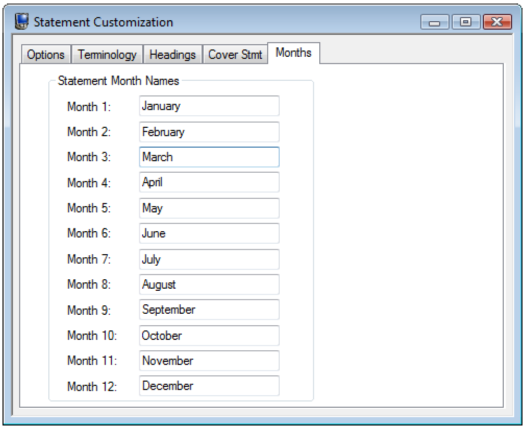

Figure 9, Statement Customization
***Months** tab*

Options tab

The **Options** tab allows you to specify if you want the previous balance line to print at the beginning of the statement or after fees and costs, whether you want non-billable hours to print, and where you want the Courtesy Discount to print. You can specify a number of blank lines or a page break between combined statements, whether you want fees double spaced, and if you want credits included on invoice format statements. You can specify if you want finance charges on invoice format statements and whether you want blank miscellaneous lines printed. You can specify whether you want the statement date to be printed in MM/DD/YYYY format or spelled out. You can specify whether current work will be included in past due amounts and if you want a combined total of all due amounts on a statement. You can specify whether you want "0.00" to print for billable transactions with zero amounts or not print an amount at all.

Terminology tab	The **Terminology** tab contains modifiable statement terminology. There are over 70 different areas of statement terminology that can be modified. For example, if you don't like the terminology "Balance Due," you can change it to whatever you like, such as "Total Amount Due." Or, as another example, you can change the "For Current Services Rendered" line to read "Professional Services." If desired, you can print optional headings for the fee, expense, advance, and payment sections of the statement. Tabs3 Billing also allows you to embed the statement date or cut-off dates in many of the statement terms. You can also apply bold, italic, and underline attributes to the statement terminology. You can configure Tabs3 Billing so the expenses and advances combine into one section on the statement. You can specify if the client's account number, the statement number, the page number, or the term "Continued" will print on statements. You can specify if you want the contact name to print before the client name.
Headings tab	The **Headings** tab allows you to enter up to nine lines of text for your firm's name and address, thus allowing you to use plain paper instead of pre-printed letterhead for your statements. These nine lines can alternatively be used to insert any type of global notes that you want printed at the top of every statement. You can also enter up to four lines of optional text that prints at the end of each statement. Many firms use these lines for a message regarding finance charge policy, payment terms, or perhaps a seasonal message. Alternatively, you can use a bitmap image file for the statement heading or you can create a custom heading and statement notes using the Statement Designer.
Cover Stmt tab	The **Cover Stmt** tab allows you to customize cover statement terminology and specify whether you want Client IDs included on the cover statement.
Months tab	The **Months** tab contains the names of the twelve months of the year. These names are used if you customized Tabs3 Billing to spell out the statement date.

Training Videos

You can view the following training video for more information. Clicking the image will open the training video in your browser. All training videos are also accessible in the software via the ***Help | Training Videos*** menu and at **Tabs3.com/t3video**.

Figure 10, Customizing Statements Video
Statement Customization Segment

Printer Setup

The next level of defining the statement format can be found in the Tabs3 Billing Statement Printer Setup.

Statement Printer Setup

Menu: ***File | Print Setup | Statement Setup button***
Task Folders: ***Setup | Print Setup | Statement Setup button***

You can use any Windows printer to generate statements. You can specify the font you want used, the paper size and source, and whether you want envelopes printed with statements. If you plan on using the nine lines specified in Customization for the statement heading, you can specify a heading font. As an alternative, you can include a bitmap of your firm's letterhead allowing you greater formatting flexibility. If you will be using the custom page layouts created by the Statement Designer (page 29), you must select the **Enable Statement Designer Layouts** check box as shown in Figure 11.

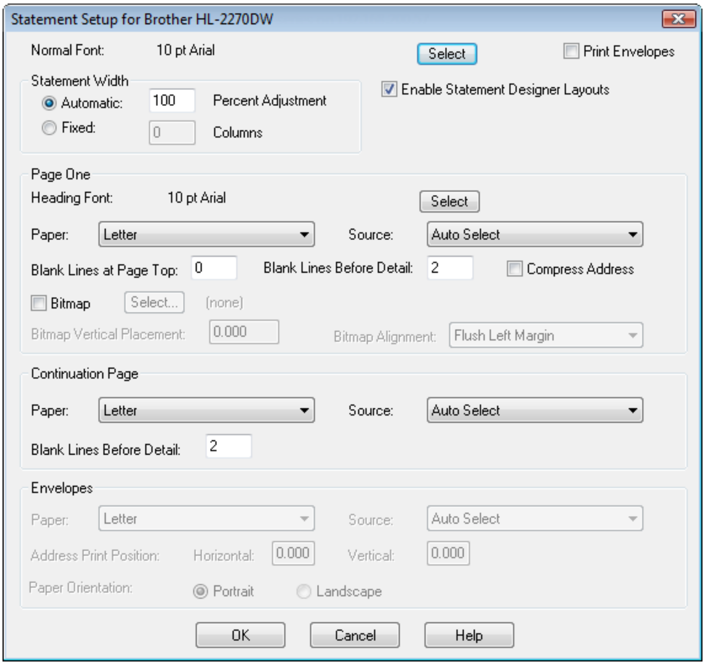

Figure 11, Print Setup - Statement Setup

Statement Templates

The next level of defining the statement format can be found in the Statement Templates window. Statement templates determine many options pertaining to the format of the billing statement.

Defining Statement Templates

Menu: ***Statements | Statement Setup | Statement Templates***

Task Folders: ***Statements | Statement Setup | Statement Templates***

Each statement template includes the following tabs:

- General
- Fee Format
- Cost/Payment Format
- Layouts

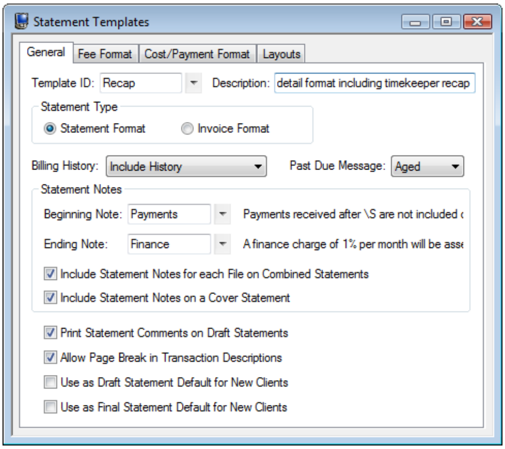

Figure 12, Statement Templates
***General** tab*

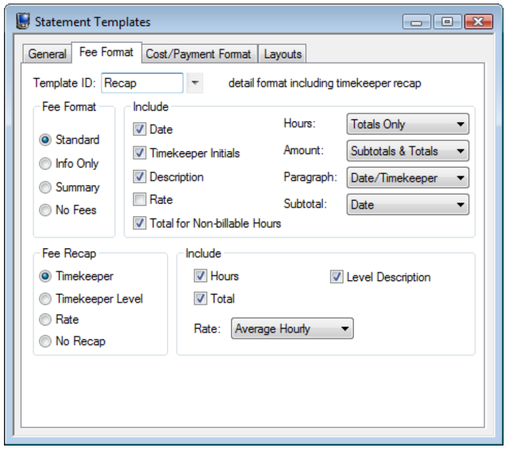

Figure 13, Statement Templates
***Fee Format** tab*

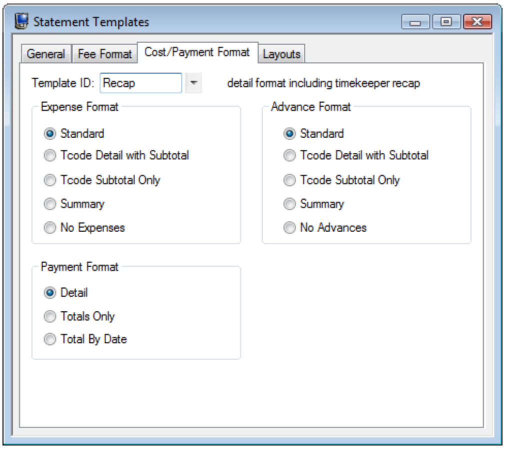

Figure 14, Statement Templates
***Cost/Payment Format** tab*

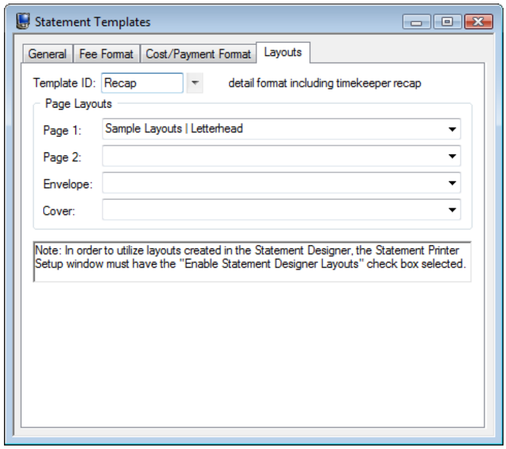

Figure 15, Statement Templates
***Layouts** tab*

General tab

The **General** tab is used to specify invoice or statement formatting, billing history options, past due messages and statement notes.

Fee Format tab	The **Fee Format** tab is used to determine whether fees print and, if so, whether timekeeper initials, dates, hours, hourly rates, and amounts are included. Subtotaling of fees is defined here. An optional fee recap by timekeeper, timekeeper level, or rate can also be set up. The recap can include hours, timekeeper levels, rates, and a total amount.
Cost/Payment Format tab	The **Cost/Payment Format** tab is used to specify whether expenses and advances print and, if so, the format used on the statement. You can also indicate whether payments will be shown in detail, be subtotaled by date, or show totals only.
Layouts tab	The **Layouts** tab is optional and is used to designate which custom Page Layouts created by the Statement Designer will be used when statements are printed for clients that are assigned this template.

These options apply to all clients who are assigned the specified template. Each client is assigned two statement templates—one for draft statements and one for final statements. Once a template has been defined, any changes made to a statement template affect all clients who are assigned that template. Some firms will have separate statement templates for each timekeeper.

There is no limit to the number of statement templates that can be defined.

Typically, firms will set up a few statement templates to use before they begin to add clients. As clients are added, they are assigned statement templates on the **Statement Options** tab of the Client file. Once statement templates have been set up and fine-tuned, the Statement Templates program is typically used only when changes or a new template is required.

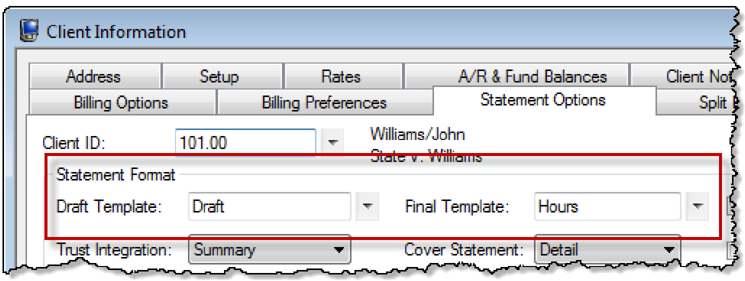

Figure 16, Statement Format Options

Adding a New Statement Template

You can add a new statement template based on default system settings.

▸ To add a statement template

1. From the Tabs3 Billing Task Folders, click the **Statements** tab, click the **Statement Setup** icon, and then click the **Statement Templates** icon.
2. On the **General** tab, enter a new **Template ID**.
3. Enter the **Description**.
4. Select the desired options on the **General**, **Fee Format**, **Cost/Payment Format**, and **Layouts** tabs.
5. Click  to save the new template.

Copying a Statement Template

You can copy an existing Statement Template and then make changes as needed.

▸ To copy a statement template

1. From the Tabs3 Billing Task Folders, click the **Statements** tab, click the **Statement Setup** icon, and then click the **Statement Templates** icon.
2. On the **General** tab, select the **Template ID** you want to use as a basis for the new template.
3. Change the **Template ID** to the name of the new statement template.
4. In the **Description** field, enter a description for the new template.
5. Make the desired changes.
6. Click  to save the new template.

Changing the Statement Template Used

When changing the statement template that is used, it can be changed either individually for each client, for multiple clients at one time, or when running specific statements.

Changing the Statement Template for One Client

You can change the Draft Template and/or Final Template via the Client file on an individual basis.

▸ To change the statement template used for a single client

1. From the Tabs3 Billing Task Folders, click the **Client** tab and then click the **Client** icon.
2. Select the **Client ID** for which you want to change templates.
3. From the **Statement Options** tab, in the **Statement Format** section, select the desired **Draft Template** and/or **Final Template**.
4. Click  to save the changes to the client.

Changing the Statement Template for Multiple Clients

If you want to change statement templates for multiple clients, you can use the Change Client Options program.

▸ To change the statement template used for multiple clients

1. From the Tabs3 Billing Task Folders, click the **Client** tab and then click the **Change Client Options** icon.
2. Select the **Client ID** range, or click **Multiple** to select multiple ranges of clients.
3. From the **Statements** tab, click the **Select** button.
4. Select **Draft Template** and/or **Final Template** and click **OK**.
5. In the **Statement Format** section, select the desired **Draft Template** and/or **Final Template**.
6. Click **OK**.

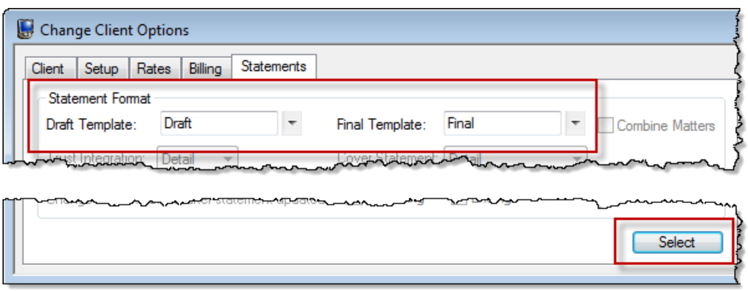

Figure 17, Change Client Options

Changing the Statement Template for One Statement

If you want to change the statement template temporarily, or test how it will look, you can select a template when generating statements.

▸ To change the template used at the time statements are generated

1. From the Tabs3 Billing Task Folders, click the **Statements** tab and then click the **Generate Statements** icon.
2. Select the **Client ID** range, or click **Multiple** to select multiple ranges of clients.
3. From the **Options** tab, in the **Statement Options** section, click the **Statement Template** button.
4. In the Statement Template Options window, click the **Select Template** button.
5. In the **Template ID** field, select the desired **Template ID** and click **OK**.
6. Click **OK** to close the Statement Template Options window.
7. Generate the statement as normal.

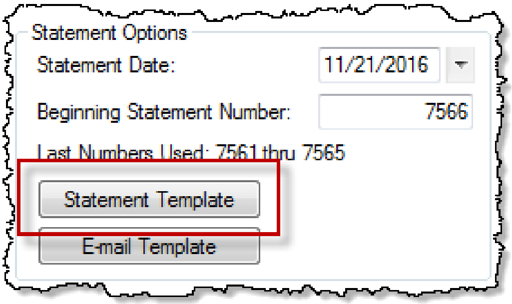

Figure 18, Generate Statements Program

After closing the Generate Statements window, the next time you run statements, the template selected in the Client file will be used unless a template has been defined and saved in a report definition.

Training Videos

You can view the following training video for more information. Clicking the image will open the training video in your browser. All training videos are also accessible in the software via the ***Help | Training Videos*** menu and at **Tabs3.com/t3video**.

Figure 19, Customizing Statements Video
Statement Templates Segment

E-mail Templates

The next level of defining the statement format can be found in the E-mail Templates window. E-mail templates are used by clients who are set up to receive statements via e-mail. E-mail template options apply to all clients who are assigned the specified template. Once a template has been defined, any changes made to the e-mail template affect all clients who are assigned that template. Some firms will have separate e-mail templates for each timekeeper, category, or billing frequency. If desired, e-mail templates can also be defined for specific clients.

Setting Up E-mail Templates

Menu:	***Statements | Statement Setup | E-mail Templates***
Task Folders:	***Statements | Statement Setup | E-mail Templates***

Each e-mail template must have valid E-mail Identification information defined in the **From Name**, **From Address**, and **Reply To Address** fields. When sending via Microsoft Outlook, the **Reply To Address** is unavailable and instead is controlled by Outlook. Additional recipients can also be defined, including entering a firm e-mail address in the **Bcc Recipients** field to ensure that a copy of the sent e-mail statement is retained in a single account's e-mail messages. The **Subject** and **Body** of the e-mail message can be defined using variables from the Available Fields list. Using variables in place of text allows e-mail statement messages to easily be customized for each individual client or matter that is set up to receive statements via e-mail. Additionally, when the cursor is in the **Body** field, the E-mail Template Toolbar is available to format text.

There is no limit to the number of e-mail templates that can be defined.

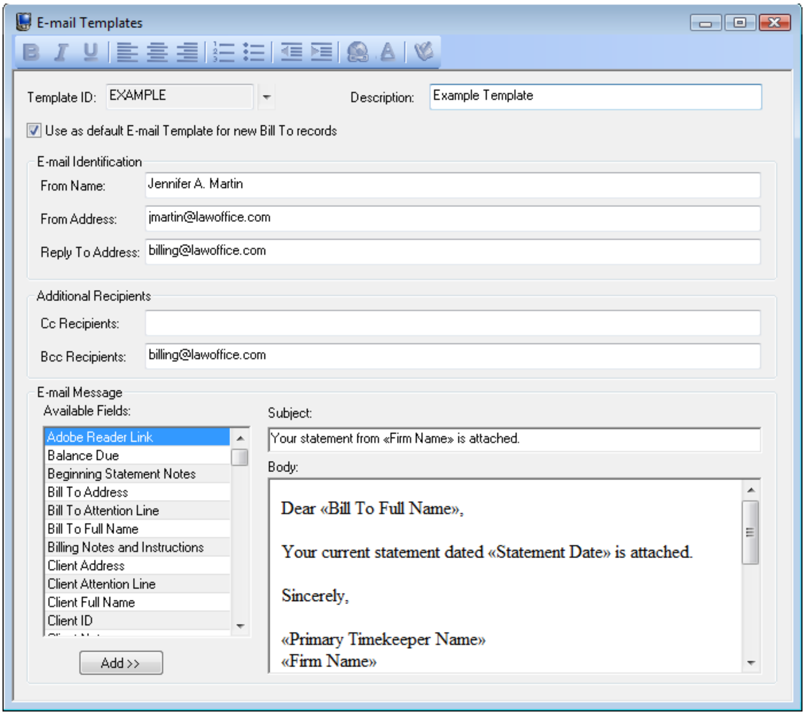

Figure 20, E-mail Templates

Typically, firms will set up a generic e-mail template before they begin to add clients. As clients who will receive e-mail statements are added, e-mail templates are assigned in the Bill To Record window, which is accessed via the **Billing Preferences** tab of the Client file. Once e-mail templates have been set up and fine-tuned, the E-mail Templates program is typically used only when a change or a new template is required.

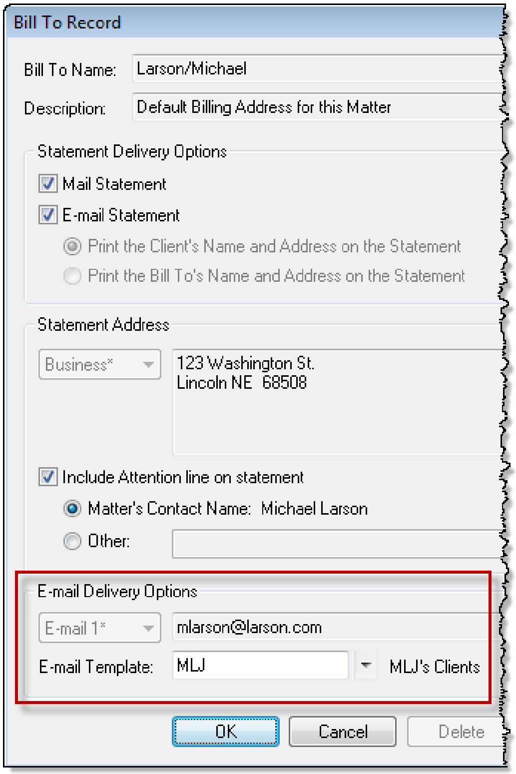

Figure 21, Bill To Record Window

More Info: Additional information on E-mail Templates can be found in Tabs3 Billing Help and in Knowledge Base Article **R11338**, "E-mailing Tabs3 Statements."

Adding a New E-mail Template

You can create a new e-mail template from scratch.

▸ To add a new e-mail template

1. From the Tabs3 Billing Task Folders, click the **Statements** tab, click the **Statement Setup** icon and then click the **E-mail Templates** icon.
2. Enter a new **Template ID**.
3. Enter the **Description**.

4. Enter the desired information for the e-mail template.
5. Click to save the new template.

Copying an E-mail Template

You can copy an existing e-mail template and then make changes as needed.

▸ To copy an e-mail template

1. From the Tabs3 Billing Task Folders, click the **Statements** tab, click the **Statement Setup** icon, and then click the **E-mail Templates** icon.
2. Enter the **Template ID** you want to use as a basis for the new template.
3. Press Esc.
4. Change the **Template ID** to the name of the new e-mail template.
5. Enter the **Description**.
6. Make the desired changes.
7. Click to save the new template.

Changing the E-mail Template Used

When changing the e-mail template used, it can be changed either individually for each client, for multiple clients at one time, or for a specific statement run.

Changing the E-mail Template for One Client

You can change the e-mail template via the Client file on an individual basis.

▸ To change the e-mail template used for a single client

1. From the Tabs3 Billing Task Folders, click the **Client** tab and then click the **Client** icon.
2. Select the **Client ID**.
3. From the **Billing Preferences** tab, in the **Statement Delivery Options** section, select the **Bill To Name** for which you want to change the e-mail template.
4. Click the **Edit** button.
5. Select the **E-mail Template** you want to use.

6. Click **OK**.
7. Click  to save the changes to the client.

Changing the E-mail Template for Multiple Clients

If you want to change e-mail templates for multiple clients, you can use the Change Client Options program.

▸ To change the e-mail template used for multiple clients

1. From the Tabs3 Billing Task Folders, click the **Client** tab and then click the **Change Client Options** icon.
2. Select the **Client ID** range, or click **Multiple** to select multiple ranges of clients.
3. From the **Billing** tab, click the **Select** button.
4. Select **E-mail Template** and click **OK**.
5. In the **Statement Delivery Options** section, select the desired **E-mail Template**.
6. Click **OK**.

> **Note:** Changing the E-mail Template using the Change Client Options program will change the template for all Bill To records associated with the selected client(s).

Changing the E-mail Template for One Statement

If you want to change the e-mail template temporarily, or test how it will look, you can select a template when generating statements.

▸ To change the e-mail template used at the time statements are generated

1. From the Tabs3 Billing Task Folders, click the **Statements** tab and then click the **Generate Statements** icon.
2. Select the **Client ID** range, or click **Multiple** to select multiple ranges of clients.
3. From the **Options** tab, in the **Statement Type** section, select **Final**. **Final** must be selected before an e-mail template can be selected.
4. In the **Statement Options** section, click the **E-mail Template** button.
5. In the Select E-mail Template window, select the desired **Template ID** and click **OK**.
6. Generate the statement as normal.

After closing the Generate Statements window, the next time you run statements, the template selected in the Client file will be used unless a template has been defined and saved in a report definition.

Training Videos

You can view the following training video for more information. Clicking the image will open the training video in your browser. All training videos are also accessible in the software via the ***Help | Training Videos*** menu and at **Tabs3.com/t3video**.

Figure 22, E-mailing Statements Video

Client Setup

The next level of defining the statement format can be found in the Client file. These options are specific to the individual client.

Setting up the Client

Menu: ***File | Open | Client***
Task Folders: ***Client | Client***

The Client tabs we will be looking at include the **Setup** tab, **A/R & Fund Balances** tab, **Billing Options** tab, **Billing Preferences** tab, and **Statement Options** tab.

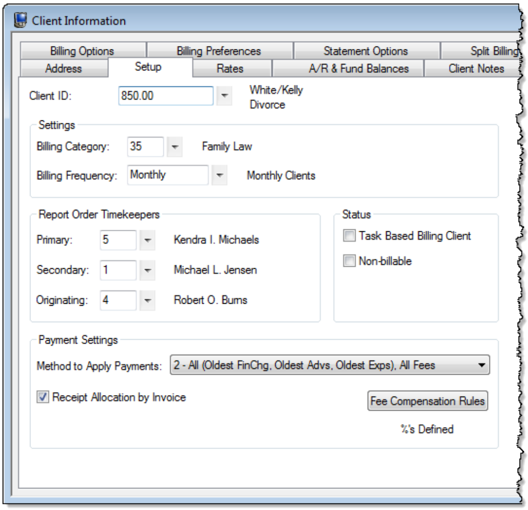

*Figure 23, Client - **Setup** tab*

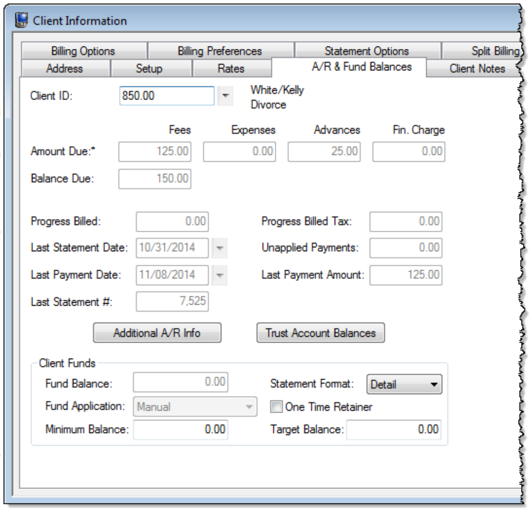

*Figure 24, Client - **A/R & Fund Balances** tab*

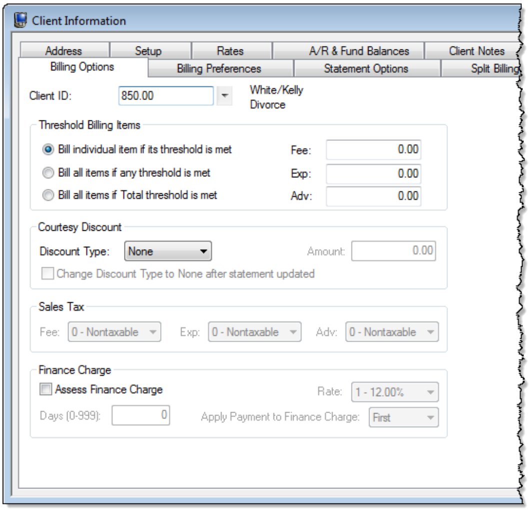

*Figure 25, Client - **Billing Options** tab*

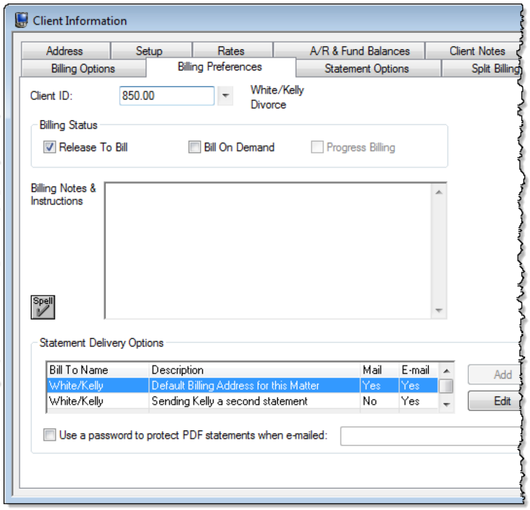

*Figure 26, Client - **Billing Preferences** tab*

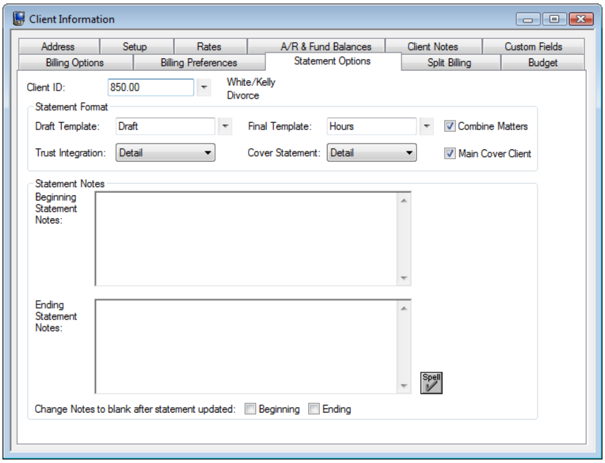

*Figure 27, Client - **Statement Options** tab*

Setup tab

The **Setup** tab of the Client file includes the billing frequency for defining client batches and the method to apply payments.

A/R & Fund Balances tab

The **A/R & Fund Balances** tab allows you to specify how client funds are applied, whether there is a minimum and/or target balance, and how funds are displayed on a client's statement.

Billing Options tab

The **Billing Options** tab allows you to specify billing to occur when thresholds are met, whether to apply a courtesy discount, sales tax rates, and finance charge options.

Billing Preferences tab

The **Billing Preferences** tab allows you to specify whether the client will receive statements via mail, e-mail, or both. It also allows you to specify an additional Bill To contact to use when a client is to receive a duplicate statement or when a client's statement is to be sent to a third party.

Statement Options tab

The **Statement Options** tab is used to designate the draft and final statement templates that will be used for this client and includes an option to combine matters on statements, cover statement options, and trust integration information. This tab also contains Beginning and Ending Statement Notes that allow optional unique statement notes for the client to print at the beginning and end of the client's statement if desired.

Training Videos

You can view the following training video for more information. Clicking the image will open the training video in your browser. All training videos are also accessible in the software via the ***Help | Training Videos*** menu and at **Tabs3.com/t3video**.

Figure 28, Tabs3 Client Overview Video

Statement Notes

There are several different levels of statement notes that can be printed on a statement including notes individual to the client, notes printed for clients using a specific statement template, and notes that appear on all clients' statements. All levels or any combination thereof can be used on a client's statement.

Implementing Statement Notes

You can define notes that will be displayed on your clients' statements via the following areas:

- Client Statement Notes
- Statement Notes program

- Statement Customization program
- Miscellaneous Lines

Client Statement Notes

Beginning and Ending Statement Notes of up to 250 characters each can be added for any client. These notes are unique to the specific client. An example of Client Beginning and Ending Statement Notes can be seen in Figure 29.

▸ To add Beginning and Ending Statement Notes for a client

1. From the Tabs3 Billing Task Folders, click the **Client** tab and then click the **Client** icon.
2. Select the **Client ID** for which you want to add notes.
3. From the **Statement Options** tab, in the **Statement Notes** section, enter the **Beginning Statement Notes** and/or **Ending Statement Notes** to be printed on the client's statement.
4. Optionally **Change Notes to blank after statement updated** by selecting the **Beginning** and/or **Ending** check box if you want the note to be printed on the next statement only.
5. Click to save the changes to the client.

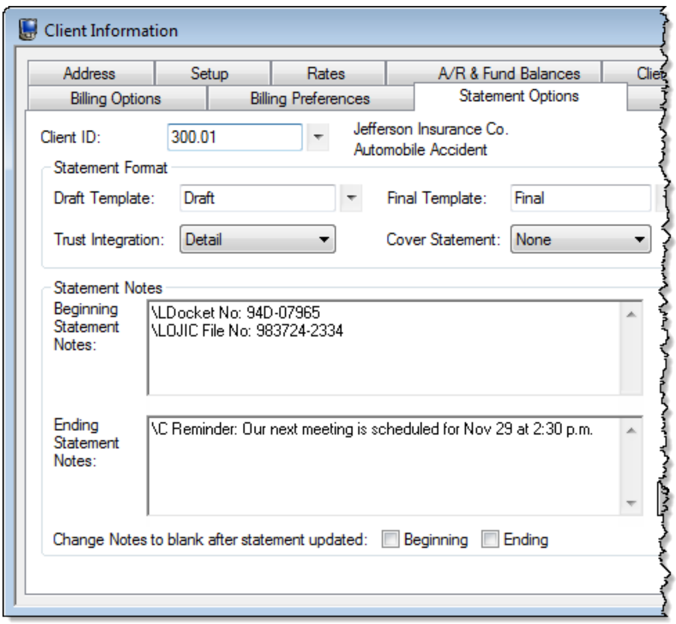

Figure 29, Client File

> **More Info:** Additional information on client options can be found on page 19 of this guide and in Tabs3 Billing Help.

Statement Notes Program

The Statement Notes program is used to create statement notes of up to 511 characters. Once created, these notes can be assigned to a Statement Template. Statement Notes will then be used by all clients who are assigned that statement template. An example of Client Beginning and Ending Template Notes can be seen in Figure 29.

There is no limit to the number of statement notes that can be defined.

▸ To add a new Statement Note

1. From the Tabs3 Billing Task Folders, click the **Statements** tab, click the **Statement Setup** icon, and then click the **Statement Notes** icon.
2. Enter a unique **Note ID**.
3. In the **Note Text** field, enter the information you want to have included in the note.
4. Click  to save the new note.

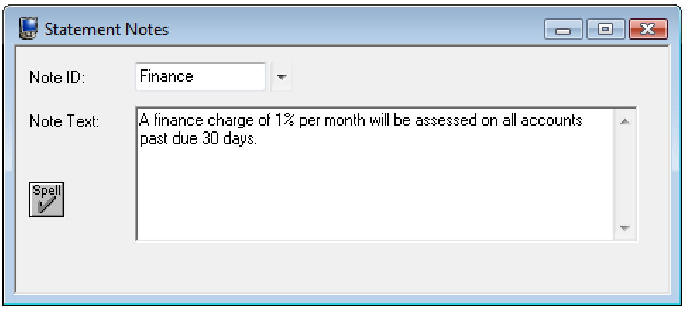

Figure 30, Statement Notes

▸ To specify the Statement Notes used on a Statement Template

1. From the Tabs3 Billing Task Folders, click the **Statements** tab, click the **Statement Setup** icon, and then click the **Statement Templates** icon.
2. On the **General** tab, select the desired **Template ID**.
3. In the **Statement Notes** section, select the desired **Beginning Note** and/or **Ending Note**.
4. Click  to save the template.

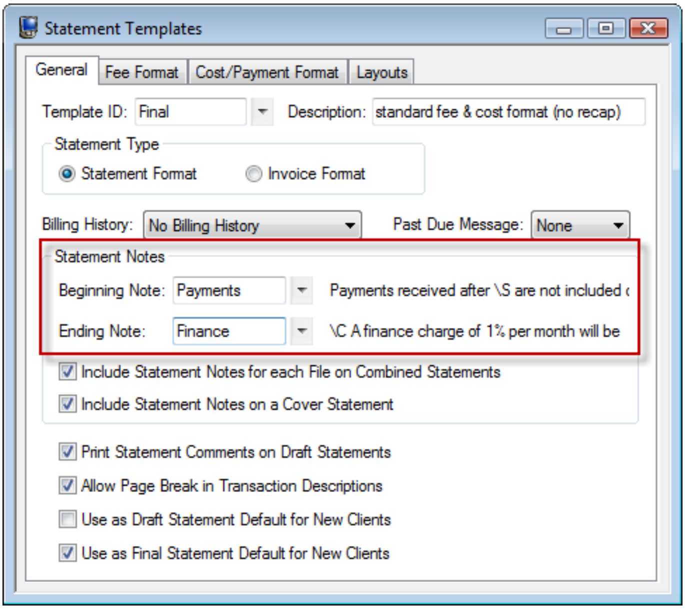

Figure 31, Statement Templates

More Info: Additional information on the statement templates can be found on page 8 of this guide and in Tabs3 Billing Help.

Statement Customization Program

The Statement Customization program provides a way to add nine lines of up to 60 characters each to be printed as a heading for each billing statement, and a message of up to 250 characters to be printed at the end of each billing statement. The text entered in Statement Customization is global, and will print on all billing statements. An example of global heading and ending messages can be seen in Figure 30.

▸ To add lines of text to a statement using Statement Customization

1. From the Tabs3 Billing Task Folders, click the **Statements** tab, click the **Statement Setup** icon, and then click the **Statement Customization** icon.
2. From the **Headings** tab, enter **Lines of text to be printed as a heading on the first page of each billing statement**.
3. Enter **Lines of text to be printed as a message at the end of each billing statement**.
4. From the **Cover Stmt** tab, enter text into **Line 1** and **Line 2** if you want text to be printed at

the top of cover statements.

5. Click  to save Statement Customization.

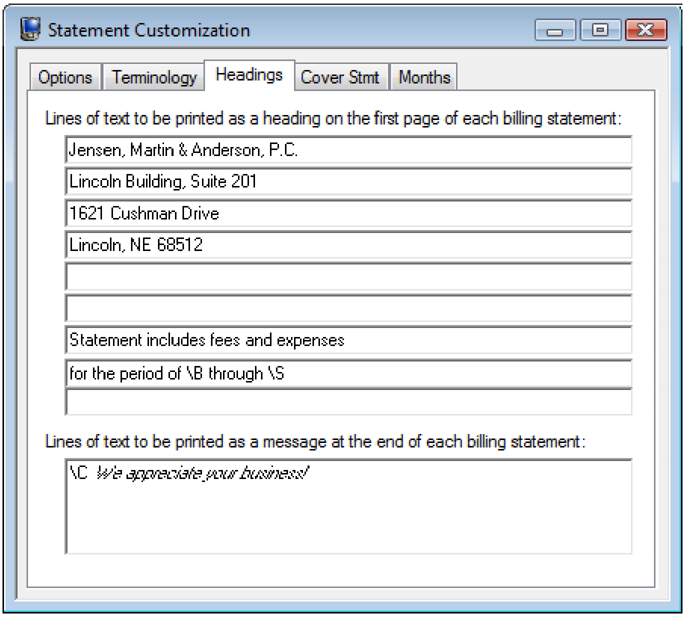

Figure 32, Statement Customization

More Info: Additional information on the Statement Customization program can be found on page 3 of this guide and in Tabs3 Billing Help.

Tip: Statement note text, regardless of where it is defined, can be formatted to include bold, italics, and underline attributes; can be aligned to the left, right, or center; and can take advantage of date codes to automatically use the statement date, beginning fee date, or ending fee date.

Miscellaneous Lines

Miscellaneous Lines 1 through 3 defined on the **Custom Fields** tab in the Client File are automatically displayed on statements, as shown in Figure 30, and can be used to add additional information about the matter. However, if using a Statement Designer Layout, these lines must manually be added to the Statement Designer Layout.

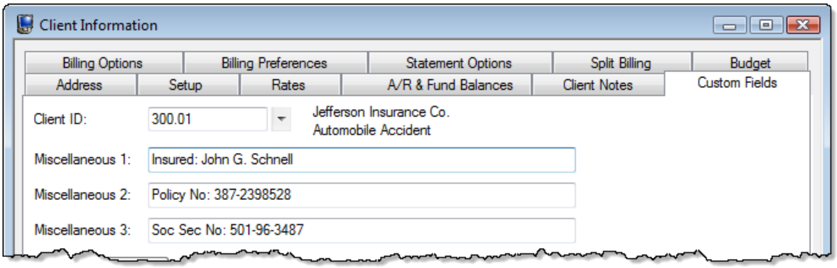

Figure 33, Miscellaneous Lines

▸ To add Miscellaneous Lines to a Statement Designer Layout

1. From the Tabs3 Billing Task Folders, click the **Statements** tab, click the **Statement Setup** icon, and then click the **Statement Designer** icon.
2. In the **Layout Tree** pane, select the desired layout.
3. In the **Field Selection** pane, expand the Client Fields folder.
4. Click and drag **Miscellaneous 1** to the location in the **Page Layout** pane where you want to place the line.
5. Repeat step 4 for Miscellaneous Line 2 and 3.
6. Click  to save the layout.

More Info: Additional information on the Statement Designer program can be found on page 29 of this guide and in Tabs3 Billing Help.

Figure 34 is an example of where the various Statement Notes are printed on a statement:

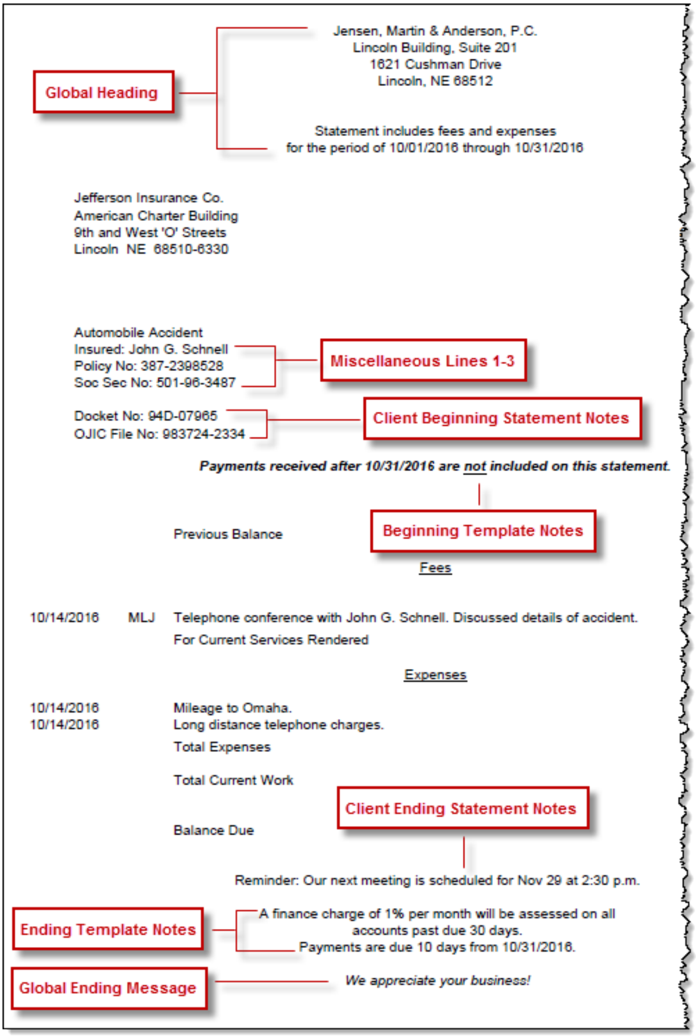

Figure 34, Statement Notes Locations

Training Videos

You can view the following training video for more information. Clicking the image will open the training video in your browser. All training videos are also accessible in the software via the ***Help | Training Videos*** menu and at **Tabs3.com/t3video**.

Figure 35, Customizing Statements Video
Statement Customization Segment

Statement Designer

The next level of defining the statement format is the Statement Designer. The Statement Designer program lets you create customized layouts for your statements that allow you to position images, text, and data. You can control the placement of various fields from the Client and Bill To files, and add customized text, images, and other layout elements to the statement. Once a page layout has been designed, it can be applied to one or more statement templates.

Using Statement Designer

Menu:	***Statements | Statement Setup | Statement Designer***
Task Folders:	***Statements | Statement Setup | Statement Designer***

The Statement Designer window includes a **Layout Tree** pane, a **Field Selection** pane, and a **Page Layout** pane.

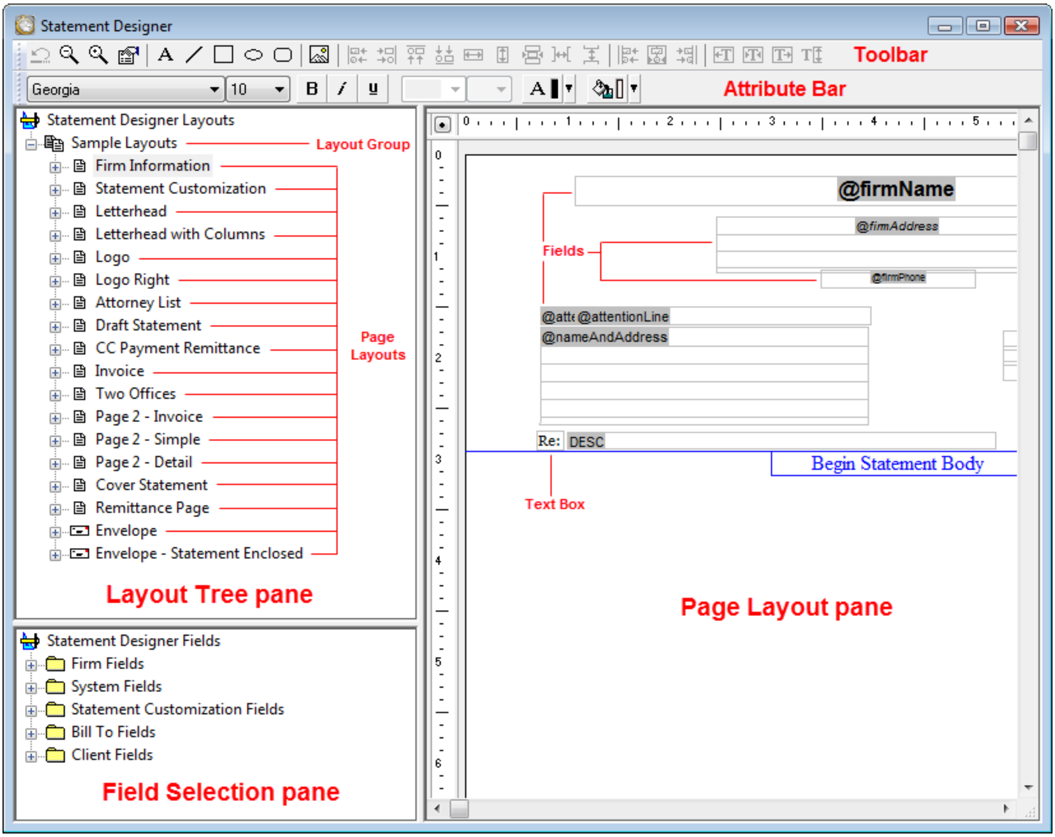

Figure 36, Statement Designer

Layout Tree pane

In the **Layout Tree** pane, you can manage the layout groups and page layouts. Each layout group consists of one or more page layouts. Clicking the plus (+) symbol next to the name of layout group (e.g., "New Layout Group") expands the layout group to display the page layouts contained therein. Likewise, clicking the minus (-) symbol next to the name of an expanded layout group will collapse that layout group, hiding its contents from view. In the **Layout Tree** pane of the Statement Designer, you can add, rename, delete, import and export layout groups, as well as add, rename, or delete individual page layouts.

Field Selection pane	The **Field Selection** pane is used to select and add fields from the Tabs3 Billing and System Configuration data files to the current page layout. Clicking the plus (+) symbol next to a branch in the **Field Selection** pane (e.g., "Firm Fields") expands that branch to show the fields contained therein. Likewise, clicking the minus (-) symbol next to an expanded branch collapses that branch, hiding its contents from view. To insert a field into the current page layout, double-click the desired field, or right-click it and select the **Insert** option.
Page Layout pane	The **Page Layout** pane is where you control the appearance of the current page layout. You can add, remove, or modify various elements such as text boxes, lines, rectangles, etc., and also control the page layout properties.

Tabs3 Billing includes a small library of statement layouts with designed letterheads, draft statement forms, a credit card remittance form, and envelopes that you can modify to use your firm's information, thus allowing you to quickly get started with the Statement Designer.

Complete details regarding the Statement Designer can be found in Help.

More Info: Additional information on using Statement Designer can be found in Tabs3 Billing Help, in Knowledge Base Article **R10923**, "Frequently Asked Questions About Statement Designer," and in Knowledge Base Article **R10901**, "Customizing the Sample Page Layouts Provided with the Tabs3 Billing Statement Designer." Additionally, there is an excellent introductory video that shows the various features available in the Statement Designer. Training Videos can be accessed at **Tabs3.com/videos**.

Enabling Statement Designer Page Layouts

Once Statement Designer Layouts have been created or edited as desired, they must be selected in a client's Statement Template and enabled in Print Setup in order to be used on a statement.

Statement Templates

The client's assigned statement template must have the desired Statement Designer Layout selected.

▸ To specify a layout for a Statement Template

1. From the Tabs3 Billing Task Folders, click the **Statements** tab, click the **Statement Setup** icon, and then click the **Statement Templates** icon.
2. On the **General** tab, select the **Template ID**.

3. On the **Layouts** tab, in the **Page Layouts** section, select an existing layout for **Page 1**.
4. Optionally select an existing layout for **Page 2**, **Envelope**, and **Cover**.
5. Click to save the template.

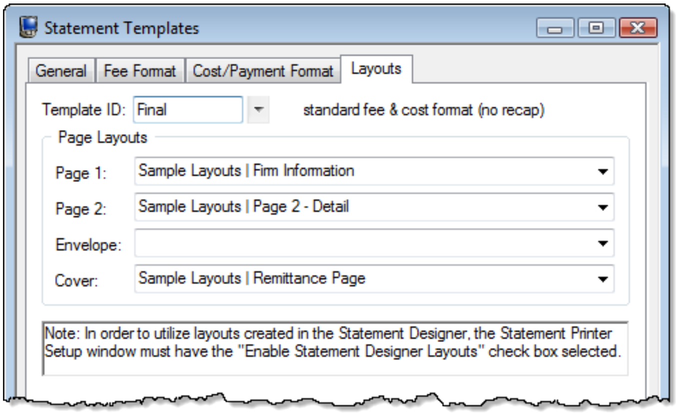

*Figure 37, Statement Setup - **Enable Statement Designer Layouts** check box*

Note: Changes to a statement template's settings will apply to every client with the template selected.

More Info: Additional information on statement templates can be found on page 8 of this guide and in Tabs3 Billing Help.

Print Setup

Statement Designer page layouts must be enabled for use in the Print Setup.

▸ To enable Statement Designer layouts in Print Setup

1. From the Tabs3 Billing Task Folders, click the **Setup** tab and then click the **Print Setup** icon.
2. Select the **Printer** to which you print statements.
3. Click the **Statement Setup** button.
4. Select the **Enable Statement Designer Layouts** check box.
5. Click **OK** on the Statement Setup window.
6. Click **OK** on the Print Setup window.

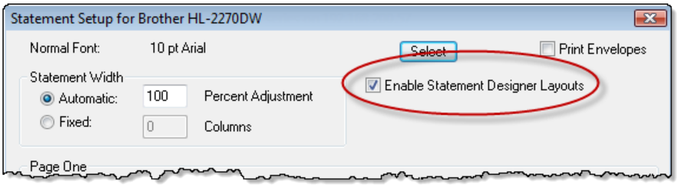

*Figure 38, Statement Setup - **Enable Statement Designer Layouts** check box*

More Info: Additional information on enabling Statement Designer Page Layouts can be found in Tabs3 Billing Help and in Knowledge Base Article **R10944**, "Printing Statements with Statement Designer Page Layouts."

Training Videos

You can view the following training video for more information. Clicking the image will open the training video in your browser. All training videos are also accessible in the software via the ***Help | Training Videos*** menu and at **Tabs3.com/t3video**.

Figure 39, Customizing Statements Video
Statement Designer Segment

Bitmaps and Image Files

Certain image files can be included on your billing statements for a letterhead, or to enhance the heading. Bitmap files (*.bmp) can be added via Print Setup if you do not want to set up a Statement Designer Layout, or you can include *.bmp, *.jpg, and *.png files in your Statement Designer Layout.

Enabling Bitmaps or Image Files

Use one of the following methods to add bitmaps or other images on your statement.

▸ To add a bitmap via Print Setup

1. From the Tabs3 Billing Task Folders, click the **Setup** tab and then click the **Print Setup** icon.
2. Select the printer to which you will be printing statements.
3. Click the **Statement Setup** button.
4. In the **Page One** section, select the **Bitmap** check box.
5. Optionally enter a **Bitmap Vertical Placement**.
6. Select a **Bitmap Alignment**.
7. Click **OK** on the Statement Setup window.
8. Click **OK** on the Printer Setup window.

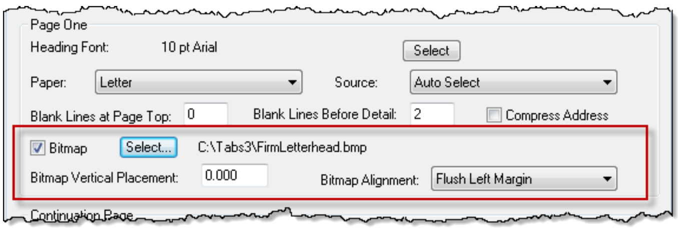

Figure 40, Printer Setup

▸ To add a bitmap or other image file via Statement Designer

1. From the Tabs3 Billing Task Folders, click the **Statements** tab, click the **Statement Setup** icon, and then click the **Statement Designer** icon.
2. Select the **Layout** to which you want to add an image.
3. Click the toolbar button.
4. Select the image file you want to have printed on statements.
5. Click the **Open** button.
6. Move the image to the desired placement.
7. Click to save the Statement Designer layout.

Tip: Software Technology offers a letterhead scanning service for a nominal fee. You can send us the letterhead you want scanned, and we will produce a bitmap file that can be used to print your firm's letterhead on Tabs3 Billing statements. For more information on our scanning service, visit Knowledge Base article **R10168**, "Bitmap Scanning Service."

Trust Accounts

When a Tabs3 Billing client is set up for Trust Integration, customized terminology can be used for trust account balances and activity on the billing statement.

Trust Account Integration and Terminology

Use the following to customize how trust accounts are shown on statements.

▸ To display trust information on statements

1. From the Tabs3 Billing Task Folders, click the **Client** tab, and then click the **Client** icon.
2. Select the client for which you want trust information displayed on statements.
3. Click the **Statement Options** tab.
4. In the **Statement Format** section, in the **Trust Integration** field, select **Detail** or **Summary**.
5. Click  to save the changes to the client.

Figure 41 is an example of how trust activity appears on the statement when the **Detail** option is selected:

```
                  Trust Account Activity

         Opening Balance                           $52,000.00
10/04/16 Expense money for Dawson
         PAYEE:  Charles L. Dawson                  -1,200.00
10/10/16 Sale of Stock                               4,255.75
10/11/16 Attorney fees
         PAYEE:  Jensen & Burns, P.C.                 -443.75
10/17/16 Real Estate taxes
         PAYEE:  Lancaster Country Treasurer        -1,450.00
                                                  ----------
         Closing Balance                           $53,162.00
```

*Figure 41, Example of **Detail** trust activity on a statement*

Figure 42 is an example of how trust activity appears on the statement when the **Summary** option is selected:

```
Your retainer balance is $53,162.00
```

*Figure 42, Example of **Summary** trust activity on a statement*

To customize terminology for trust accounts

1. From the Trust Accounting Software Task Folders, click the **Setup** tab, and then click the **Bank Accounts** icon.
2. Select a **Bank Account**.
3. Click the **Integration Settings** button.
4. In the **Tabs3 Statement/WIP Terminology** section, enter the desired balance and remittance text.
5. Click  to save the changes to the bank account.

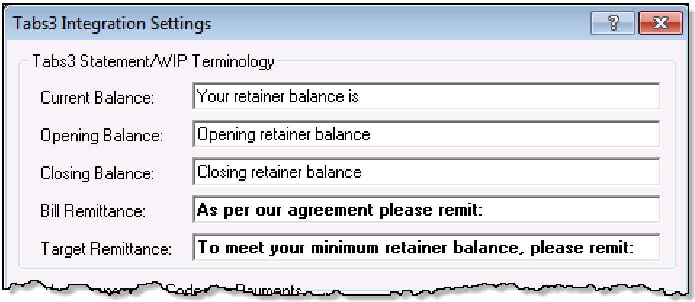

Figure 43, TAS - Tabs3 Statement/WIP Terminology

Training Videos

You can view the following training video for more information. Clicking the image will open the training video in your browser. All training videos are also accessible in the software via the ***Help | Training Videos*** menu and at **Tabs3.com/t3video**.

Figure 44, Tabs3 Trust Accounting Integration Video

Conclusion

Resources

Tabs3 Billing statement customization features provide the tools to give your statements the look you want. Additional information on the features discussed in this guide can be found in the Tabs3 Billing Help. Simply press F1 from anywhere within the software to load the Help information for that particular topic.

Guides and Sample Statements

Additional guides and resources for other software features are also available, including the following:

- **Statements Guide** - This guide provides an overview of the process of generating monthly billing statements.
- **Tabs3 Billing Sample Reports** - Over 20 pages of sample statements, and the formatting options that were used to create the statements, can be found in the Tabs3 Billing Sample Reports.

All guides and sample report packs are available on our Web site at:

Tabs3.com/support/docs.html

Knowledge Base

Our Knowledge Base can be accessed 24 hours a day, 7 days a week. You can also access our Knowledge Base while in the software by selecting ***Help | Internet Resources | Knowledge Base***.

- **R11582** - "Statements Information Resources," is a comprehensive list of Knowledge Base Articles containing more information about Tabs3 Billing statements.

All Knowledge Base Articles are available on our Web site at:

support.Tabs3.com

Training Videos

You can view the following training videos for more information. Clicking an image will open the associated training video in your browser. All training videos are also accessible in the software via the ***Help | Training Videos*** menu and at **Tabs3.com/t3video**.

Figure 45, Customizing Statements Video

Figure 46, E-mailing Statements Video

Figure 47, Client Overview Video

Figure 48, Trust Accounting Integration Video

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