

What's New List for Version 19 of Tabs3, PracticeMaster, and Tabs3 Financial Software

Highlights

All Tabs3 & PracticeMaster Software

- **New Look** - Includes larger font, new color, theme, and navigation options.
- **New Quick Launch** - Provides a search bar to search for actions, includes your recent Matters and recent actions, and lets you pin and reorder your frequently used matters and actions.
- **New Tabbed Interface** - Quickly switch between open windows.
- **New Home Page** - The new Home Page provides a modern look and feel while keeping the accessibility of the classic Task Folders.
- **New Theme Settings** - Each user can customize their own theme for each product.

Tabs3 Highlights

- **Tabs3 Online Payments** - Added the ability to include a ProPay payment link with your emailed statements allowing clients to pay their bill online.
- **Recap of Hours** - New graphical Recap of Hours with daily, weekly, and monthly options that shows billable and non-billable hours and amounts.
- **Reorder Fees on Statements** - A new Reorder Fees utility allows you to change the order in which fees with the same date appear on statements.
- **Write-Up/Write-Down Fees and Costs Across Matters** - You can now write-up or write-down all matters for a client at the same time.
- **Apply Payments to Multiple Matters** - Payments for multiple matters can now be applied to individual statements.
- **Better Handling of Credit Transactions** - Entering credits for paid transactions will automatically apply the credit to accounts receivable when the statement is updated. Produce a credit memo by running a statement with only credit transactions.
- **Historic A/R Report** - The Detail and Summary A/R Reports can now provide A/R totals for a specific date, based on historical data. Requires the Platinum version of Tabs3.

PracticeMaster Highlights

- **Batch Journal Record Creation from Outlook** - Added the ability to create journal records from multiple Outlook email messages at the same time.
- **Designate Restricted Fields** - Added the ability to prevent editing of specific fields by designating which users have rights to edit restricted fields in a file.
- **Recap of Hours** - New graphical Recap of Hours with daily, weekly, and monthly options that shows billable and non-billable hours and amounts and optionally includes unprocessed timer records.
- **Dashboard** - New dashboard on the Home page shows the user's calendar, task list, and recap of hours.

- **Outlook Plug-in** - Added a new **Attach PM Document** button to the Outlook Plug-in toolbar that makes it easy to attach PracticeMaster documents while composing email in Outlook.
- **Change Client ID for Fees and Costs** - Expanded the Change Client ID action to allow fee and cost transactions to be moved or replicated between matters.

General Ledger Highlights

- **New Statement of Cash Flows Report** - Added a new Statement of Cash Flows Report that shows how changes in Balance Sheet and Income Statement accounts affect the firm's cash flow.
- **New Advanced Client Costs Report** - Added a new Advanced Client Costs Report that makes it easier to reconcile advanced client costs between Tabs3, Accounts Payable (APS), and General Ledger (GLS).

Accounts Payable Highlights

- **Designate Vendors and Bank Accounts as Inactive** - Added the ability to designate vendors and bank accounts as inactive.
- **New EFT Transaction Type** - Added a new Transaction Type of EFT, making it easy to record invoices that were paid electronically.
- **Print Checks** - The **Select Invoices to Print** feature now displays the number of invoices selected and total amount to pay. Added a Tabs3 column that shows if the invoice is paid, unpaid, or not associated to a Tabs3 cost. Added the ability to exclude invoices with unpaid Tabs3 cost transactions.
- **Check Register & Report Improvements** - The Tabs3 section of the reports has been enhanced to include the Tabs3 Tcode number, Transaction Type ("E" for Expense or "A" for Advance), and Payment Status (Paid or Unpaid), thus making it easier to reconcile Advanced Client Costs.
- **Tabs3 E-file** - Added a new Tabs3 1099 E-file feature that allows you to submit 1099 information to an online portal, which can electronically file, or physically print and mail, your 1099-MISC and 1096 forms with the IRS and to vendors.

Trust Accounting Highlights

- **Designate Bank Accounts as Inactive** - Added the ability to designate a bank account as inactive.
- **Tabs3 E-file** - Added a new Tabs3 1099 E-file feature that allows you to submit 1099 information to an online portal, which can electronically file, or physically print and mail, your 1099-MISC and 1096 forms with the IRS and to vendors.

Tabs3 Connect Highlights

- **New Look** - Updated the user interface with new icons, a new font, and updated colors to provide a consistent look between devices and improve readability.
- **Recap of Hours** - New graphical Recap of Hours with daily, weekly, and monthly options that shows billable and non-billable hours and amounts.
- **Data Entry** - Added the Timekeeper field making it easy to add fees for other timekeepers. Added the Bill Code field making it easy to override the default billable or printable status. Enhanced the defaults and behavior of data entry fields to match PracticeMaster.

Note: Subsequent pages include a comprehensive list of all changes made in Version 19.

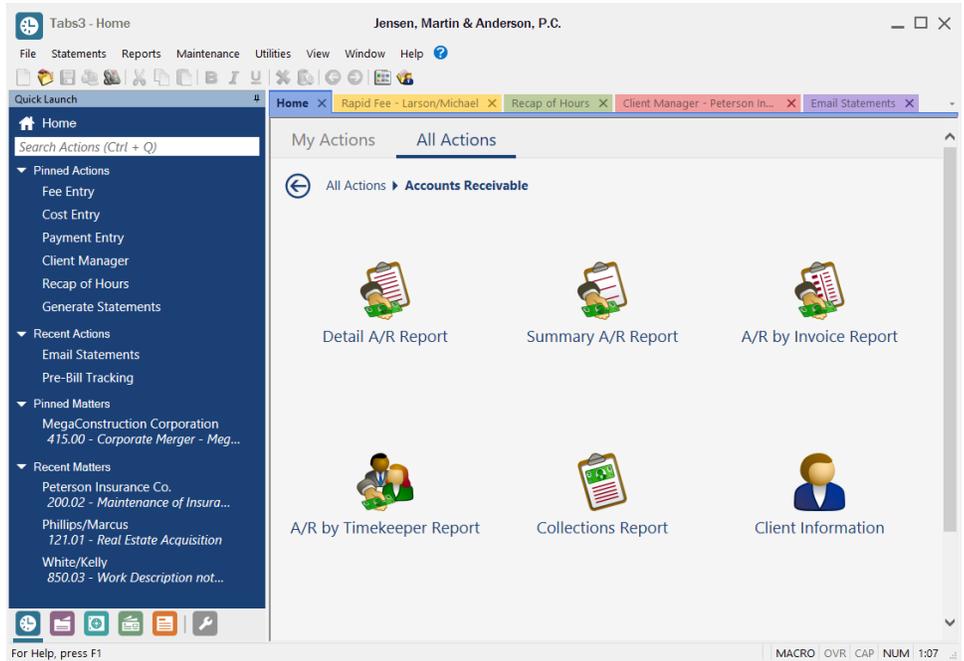
All Tabs3 & PracticeMaster Changes

New Font Face

- Updated fonts with larger text in windows, menus, page tabs, lists, and messages in **all** programs provide a fresh clean look and greatly improve readability.

New Quick Launch

- The new Quick Launch pane provides a search bar to easily find actions. Quick Launch includes your recent matters and recent actions, and lets you pin and reorder your frequently used matters and actions.
- Each user can quickly change the size of text in Quick Launch by pressing Ctrl while using the mouse's scroll wheel.

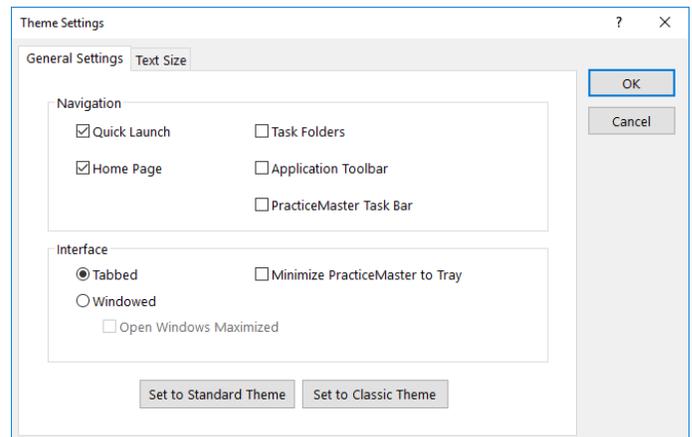


New Home Page

- Use the new Home page with its modern look and feel, or keep the classic Task Folders for selecting actions.
 - The **My Actions** page allows you to customize which programs and reports are shown and group them, providing quick access to your actions.
 - The **All Actions** page provides access to all programs and reports.
- Each user can quickly change the size of text and icons on the Home page by pressing Ctrl while using the mouse's scroll wheel.

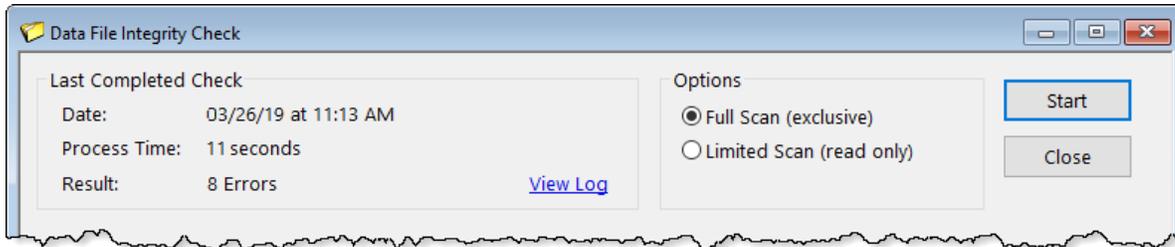
New Theme Settings

- The new Theme Settings window makes it easy for each user to customize their own theme for each product or all products.
- Use the new Tabbed interface to quickly switch between open windows, or keep the classic Windowed interface.
- Opt in to use the new Standard Theme or keep the Classic Theme when you first start the software, and make changes at any time.
- Customize the text size used in windows, menus, page tabs, lists, and messages.



Updated Data File Integrity Check

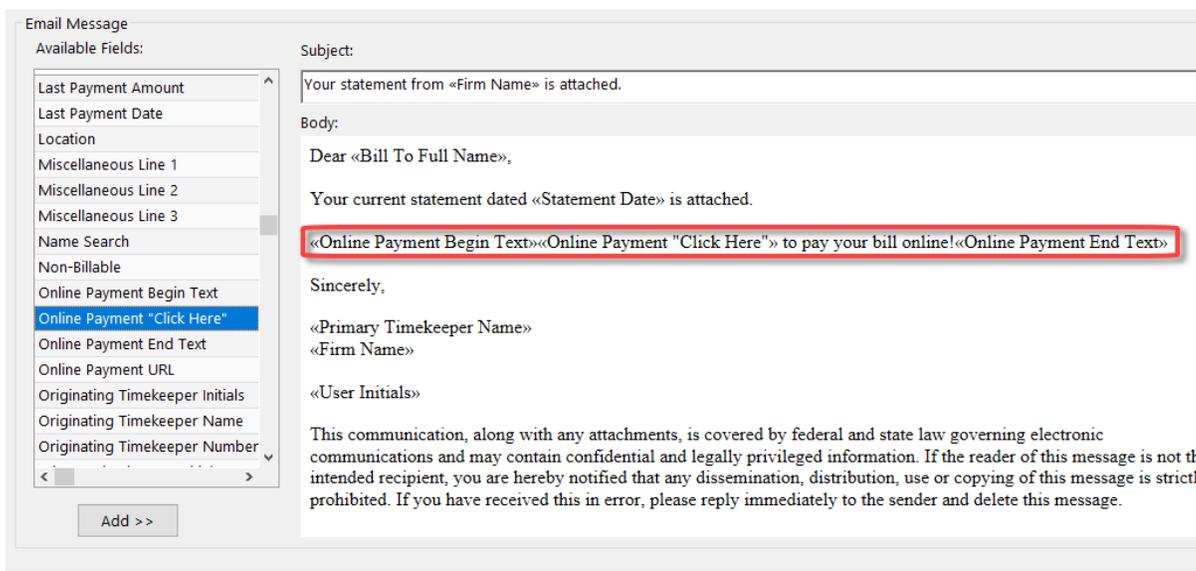
- The Data File Integrity Check window has been updated to provide easy access to the last completed check. Additionally, access to prior DFIC logs has been added to the Support Log.
- Details for the last completed check is shown on the window, with a link to access a PDF of the latest error report. The last five error reports for each program can be accessed from the Support Log and are stored in the current working directory.

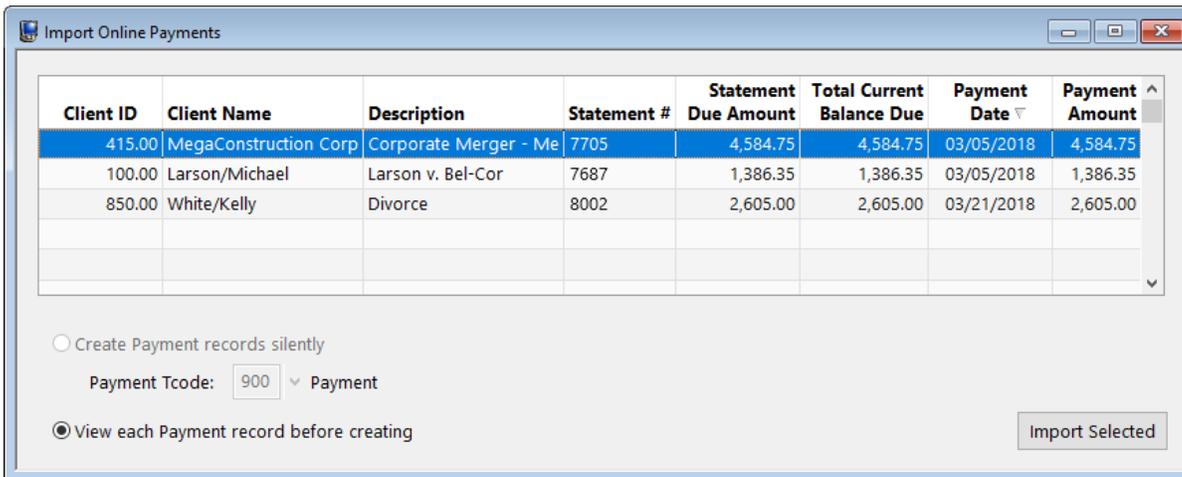


Tabs3 Billing Changes

Tabs3 Online Payments ***New Feature***

- Added the ability to include a credit card payment link with your Email Statements, allowing firms to pay using a credit/debit card or electronic check.
- This method provides additional security, because the firm does not need to handle every credit card. Therefore, sensitive cardholder information is never seen or shared, resulting in a more secure transaction. Your firm must have an account with ProPay.
- Use the new Import Online Payments program to quickly import these online payments.
- Tabs3 displays a notification badge making it easy to see when clients have made online payments. The badge includes a count that is updated after importing payments. Opening the Import Online Payments window will also check for payments to be imported.





Apply Payments to Multiple Matters

- Payments for multiple matters can now be applied to individual statements.
- Payments can be allocated by statement date, proportionally, or individually customized.
- The split payments will make individual journal entries in GLS that will be linked together and show as one item in GLS on the Reconciliation.

Change Fee Order on Statements *****New Feature*****

- Added a Reorder Fees utility that allows you to change the order in which fees with the same date appear on statements (**Statements | Statement Preparation | Reorder Fees**).

Reports Include Start Each Sort on a New Page Option

- The **Sort** tab for many reports now includes a **Start Each Sort on a New Page** check box. This check box makes it possible to run reports with or without page breaks between sort orders.

Improved Handling of Credit Transactions

- Improved handling of credit transactions. Entering credits for transactions already paid will now seamlessly apply the credit to the client's accounts receivable when the statement is updated.
- As a result of this new feature, payments that applied to credited amounts are automatically reallocated, which will help eliminate scenarios where timekeepers and cost types have credit balances.
- You can now effectively produce a credit memo by running statements for clients who only have credit transactions. This is done via the **Only Include Fee Credits** and **Only Include Cost Credits** check boxes on the **Transactions** tab of the Generate Statements program.

Statements

- "Amount" can now be printed as a column heading for fees. This option is available on **Line 77** of the **Terminology** tab in Statement Customization (**Statements | Statement Setup | Statement Customization**).
- You can now exclude clients who only have a credit balance using the new **Exclude Credit Balance Only Clients** check box on the **Options** tab of the Generate Statements program. This feature is particularly useful when generating reminder statements.

Statement Designer

- Added the ability to use the Client Notes field in the Statement Designer. (Version 18.1.4.793 and later)

Update Statements

- Significant speed improvements in certain situations.

Client Manager

- Tabs3 now allows multiple Client Manager windows to be opened. To open an additional Client Manager window, press the Ctrl key when clicking the Client Manager action in the Quick Launch pane or the Client Manager menu option (**File | Client Manager**).
- Clicking a matter in the Recent or Pinned Matters section of the Quick Launch pane will put focus in the oldest Client Manager for that matter, or open a new Client Manager window for that matter if one is not currently open. Holding the Ctrl key while clicking a matter in the Quick Launch pane, the Client Manager action on the Home page or Quick Launch pane, or when clicking the Client Manager icon on the toolbar will always open a new Client Manager window.

Entry Lists

- The Entry Lists at the bottom of the Fee, Cost, Payment, and Client Funds data entry windows have the following improvements:
 - The Description column now displays as much text that will fit in the available space. Previously, the **Description** column was truncated at 50 characters.
 - Hovering over the Description column displays a tooltip with the full contents.

Data Entry

- The Tcode for Fee and Cost entry now defaults to the Tcode last used.
- The Tcode for Payment entry now defaults to the last Regular payment Tcode used.

Transaction Lookup Windows

- When using the Reference lookup window in the Fee, Cost, Payment, Client Funds data entry windows, the Description column now displays as much text that will fit in the available space. Previously, the Description column was truncated at 50 characters.

Customization

- Renamed the “Print trust balance only statements when no activity” check box on the **Other Systems** tab of Customization to “Generate statements that only have a trust balance or remittance request” in order to better describe the behavior.

Client Funds

- Added the ability to designate a default **Fund Application** method for Client Funds on the **Client Funds** tab of Customization. Previously, all new matters defaulted to Manual.

Write-Up/Write-Down Fees and Costs

- Added the ability to write-up or write-down all matters for a client at the same time. In previous versions, you could only write-up or write-down one matter at a time.

Pre-Bill Tracking

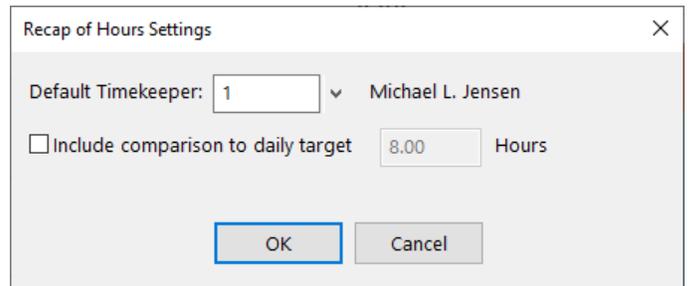
- Changed Pre-Bill Tracking from a Single Access Function to a Multi-User Function, thereby allowing multiple users to be in the program at the same time.

Timer

- Resetting the timer now includes an optional confirmation message, which helps eliminate accidental resets.

Recap of Hours

- New graphical Recap of Hours widget replaces the Fee Recap window and includes Daily, Weekly, and Monthly options.
- Easily see total hours and amounts for the selected timekeeper, broken down by billable and non-billable fees.
- A Settings window lets you specify a daily hours target and a default timekeeper, making it easy to see the daily status for the timekeeper.
- Added a new Recap of Hours menu option (**File | Recap of Hours**) and new icons to the Home Page and Task Folder.
- When viewing fee transactions for a specific date, the Description column now displays as much text that will fit in the available space. Bold, underline, and italics text is now also shown.



Recap of Hours Settings

Default Timekeeper: 1 Michael L. Jensen

Include comparison to daily target 8.00 Hours

OK Cancel



Fee Compensation Rules Report

- Added the ability to include allocation amounts for each rule. You can include the total amount allocated for each rule and optionally include the amount allocated by payment for each rule. (Version 18.1.4.894 and later)

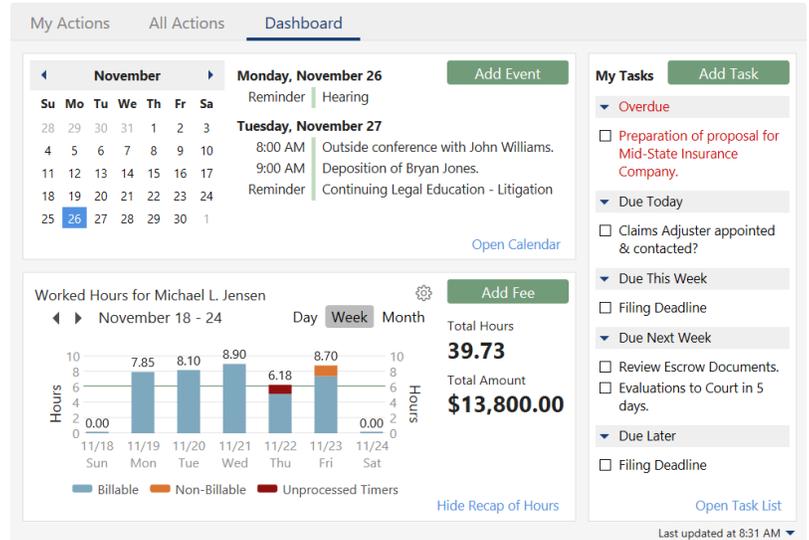
Client Lookup Lists

- Significant speed improvements when excluding inactive clients.

PracticeMaster Changes

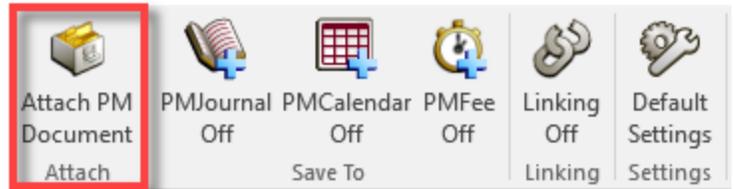
Dashboard ***New Feature***

- The Home Page in PracticeMaster features a Dashboard that includes an easy to use graphical view of the current user's calendar, task list, and recap of hours.
 - The **Calendar** widget shows a list of your upcoming events along with a calendar to pick a different date. Mouse over an upcoming event to see more details, or click it to open it for editing. You can quickly add an item and open the full calendar.
 - The **My Tasks** widget shows all of your incomplete tasks broken up into sections by due date, making it easy to see what needs to be done first.
 - The **Recap of Hours** widget shows your hours worked compared to your daily target hours, making it easy to see the status of your worked hours, including any unprocessed timer records.
- The Home Page opens to the last used view, either the Dashboard, All Actions, or My Actions.



Outlook Plug-in ***New Button***

- Added a new **Attach PM Document** button to the PracticeMaster toolbar for the Outlook Plug-in. When composing an email in Outlook, clicking the **Attach PM Document** button opens the PracticeMaster Document Management file in Outlook, allowing you to select which documents you want to attach to the email.
- You can search, sort, and filter documents just like you do in PracticeMaster.
- Up to ten documents can be selected each time you click the **Attach PM Document** button.
- The **Attach PM Document** button can be used multiple times to attach additional documents to the email.



WordPerfect Plug-in

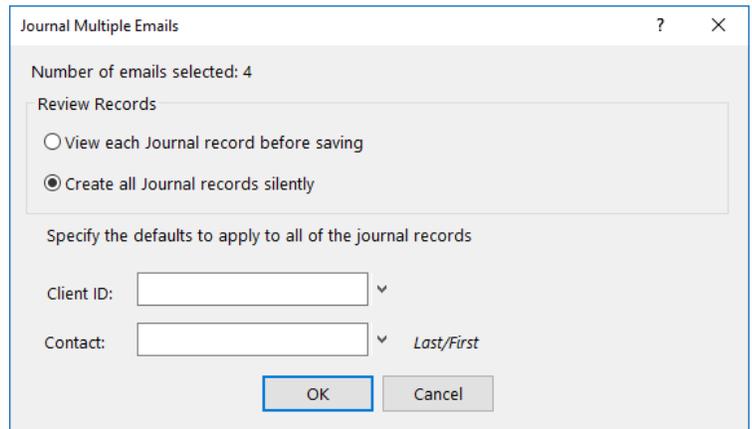
- Updated the PracticeMaster Toolbar Plug-in to integrate with WordPerfect X9.

ScanSnap Plug-in

- Updated the PracticeMaster Toolbar Plug-in to integrate with the Fujitsu ScanSnap Home software.

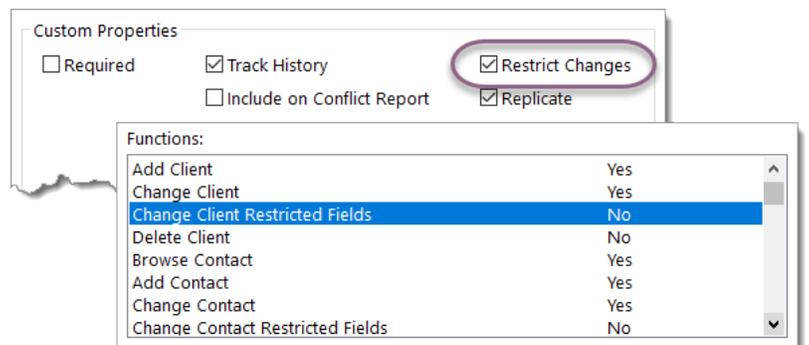
Batch Journal Record Creation from Outlook

- Added the ability to create journal records from multiple Outlook email messages at the same time. Create all journal records silently or view each journal record before saving. Previously, you could create only one record at a time.



Designate Restricted Fields & Which Users Can Change Restricted Fields *** New Feature ***

- Added the ability to prevent editing of specific fields by designating which users have rights to edit restricted fields in a file. For example, you can restrict who has the ability to change the Work Description or Miscellaneous Description lines in the Client file because these fields are used for billing purposes.
 - Managers can designate which fields are restricted via the new **Restrict Changes** check box in File Maintenance.
 - The new “Change Restricted Fields” access rights in the Access Profile let you control who has rights to modify restricted fields. Separate access rights are available for most files.
 - Restricted fields is a PracticeMaster only feature. If you want to restrict the ability to edit fields in Tabs3 that are common to Tabs3 and PracticeMaster, consider having those users use PracticeMaster for data entry and editing fields instead of using Tabs3.



Increased Field Limits

- Increased the number of fields allowed in a file. A file can now have up to 450 user-defined fields **in addition** to the protected fields. Previously, there was a maximum total of 435 fields in a file, which included user-defined fields **and** protected fields.

Word Document Assembly

- Streamlined the assembly process by eliminating the Show Assembly option; the assembly process always displays now.
- Added a “HideAssembly” variable to improve performance for complex templates.

Data Entry

- The Tcode for Fee and Cost entry now defaults to the Tcode last used.
- Added a Change Client ID option for work-in-process Fee and Cost entries, with the option to use the new client’s Rate and recalculate the Amount. Updated the Change Client ID option for Journal records that have been converted to fees to also update the linked fee record.
- Added a Replicate option for Fee and Cost entries to make a copy of the transaction, with the option to use the new client’s Rate and recalculate the Amount.

Last Used File Saved as Default

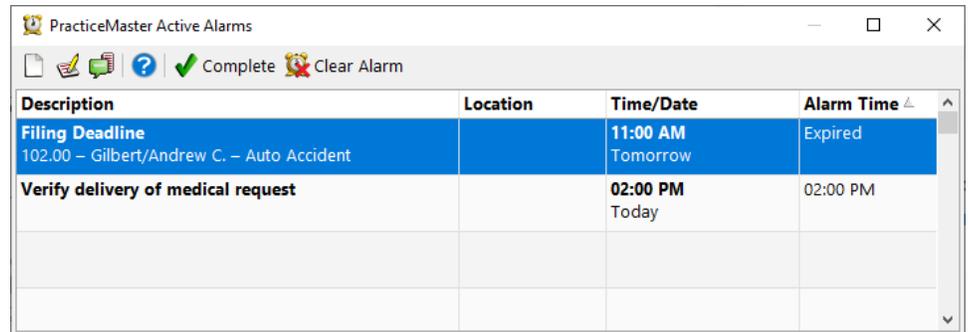
- When accessing All Other Files, File Maintenance, Import Data, WorkFlows, and the Word Document Assembly File Access window, the last selected file will be saved as the default.

Timer

- Launching a Timer window when a Timer window is open now displays the current Timer window. To open an additional Timer window, press the Ctrl key when launching a Timer window, or right-click in the Timer window and select **Open Additional Timer Window**.

Alarms

- Updated the Alarm Notification and Active Alarms windows to include the Location field and the End Time.
- Added the ability to eNotify a calendar record from the Alarm window toolbar or right-click menu.
- Added the ability to delete a calendar record from the right-click menu for the Alarm.



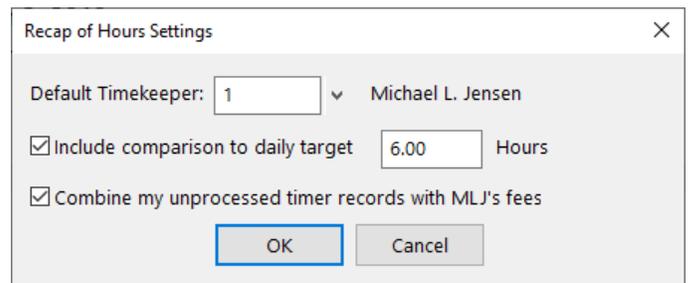
| Description | Location | Time/Date | Alarm Time |
|--|----------|-----------------------------|------------|
| Filing Deadline 102.00 – Gilbert/Andrew C. – Auto Accident | | 11:00 AM Tomorrow | Expired |
| Verify delivery of medical request | | 02:00 PM Today | 02:00 PM |
| | | | |
| | | | |

Matter Manager

- PracticeMaster now allows multiple Matter Manager windows to be opened. To open an additional Matter Manager window, press the Ctrl key when clicking the Matter Manager action in the Quick Launch pane, the Matter Manager Task Bar icon, or the Matter Manager menu option (**File | Matter Manager**).
- Clicking a matter in the Recent or Pinned Matters section of the Quick Launch pane will put focus in the oldest Matter Manager for that matter, or open a new Matter Manager window for that matter if one is not currently open. Holding the Ctrl key while clicking a matter in the Quick Launch pane, the Matter Manager action on the Home page or Quick Launch pane, or when clicking the Matter Manager icon on the PracticeMaster Task Bar will always open a new Matter Manager window.

Recap of Hours

- New graphical Recap of Hours widget replaces the Fee Recap window and includes Daily, Weekly, and Monthly options.
- Easily see total hours and amounts for the selected timekeeper, broken down by billable and non-billable fees.
- A Settings window lets you specify a daily hours target and a default timekeeper, making it easy to see the daily status for the timekeeper. Optionally include hours from unprocessed timer records.
- Added a new menu Recap of Hours menu option (**File | Recap of Hours**) and a new icon to the People group in All Actions.



Recap of Hours Settings

Default Timekeeper: 1 Michael L. Jensen

Include comparison to daily target 6.00 Hours

Combine my unprocessed timer records with MLJ's fees

OK Cancel

Form Designer Font

- Added the ability to change the font face and size used for a file's form layout. You can use the new standard font (Segoe UI), revert to the classic font used in earlier versions (MS Sans Serif), or select a custom font face and size.

After changing the font, you will be given the option to apply the font change to all PracticeMaster files.

Client List

- System performance is improved when using the **Active Only** Client List option.

General Ledger Software (GLS)

Statement of Cash Flows Report *New Report*****

- Added a new Statement of Cash Flows Report that shows how changes in Balance Sheet accounts affect the firm's cash flow.

| Statement of Cash Flows | |
|---|-----------------------|
| Jensen, Martin & Anderson | |
| Department: All Departments | Nov 1 - Nov 30 |
| Operating Activities | |
| Net Income | 25,299.05 |
| Adjustments to reconcile Net Income to net cash provided by operations: | |
| Client Cost Advances | -1,159.50 |
| Advanced Client Costs | -1,205.50 |
| Furniture & Fixtures | -7,000.00 |
| Accumulated Depreciation | 1,097.73 |
| Life Insurance | 2,000.00 |
| Prior Years' Retained Earnings | -2,734.50 |
| Net cash provided by Operating Activities | 22,991.12 |
| Investing Activities | |
| Equipment | -1,000.00 |
| Computers | -725.00 |
| Net cash provided by Investing Activities | -1,725.00 |
| Financing Activities | |
| Opening Balance Equity | 2,540.00 |
| Additional Paid in Capital | 4,745.00 |
| Net cash provided by Financing Activities | 7,285.00 |
| Net cash increase for period | 28,551.12 |
| Cash at beginning of period | 244,425.33 |
| Cash at end of period | 272,976.45 |

Advanced Client Costs Report *New Report*****

- Added a new Advanced Client Costs Report that makes it easier to reconcile advanced client costs between Tabs3, Accounts Payable (APS), and General Ledger (GLS). This report includes figures from Tabs3 Accounts Receivable and Work-In-Process Advances, APS unposted and unpaid invoices, and the GLS Account balance for any account(s) configured as Advanced Client Costs accounts.

Advanced Client Costs Report
Jensen, Martin & Anderson

| | | |
|---|---|------------|
| Tabs3 Advances Due | | 616.50 |
| Tabs3 WIP Advances | + | 864.00 |
| APS Unposted Unpaid Invoices | - | 275.00 |
| APS Unposted Checks/EFTs | - | 0.00 |
| Calculated Advanced Client Costs Balance | | 1,205.50 |
| GLS Account #1210.00 Client Cost Advances Balance | - | 1,205.50 |
| Discrepancy | | In Balance |

Information regarding discrepancies can be found in the Knowledge Base at:
<http://support.tabs3.com/main/R11757.htm>

Account Setup

- Added an **Account Setup** button to the Account Information window (**File | Open | Account Information**) to access the Account Setup for the selected account.
- Added the option to designate an Asset account as an Advanced Client Costs Account. These accounts will be used for the new Advanced Client Costs Report.
- Added the ability to classify non-bank asset accounts and liability accounts as Operating, Investing, or Financing, which is how they will be reported on the new Statement of Cash Flows Report.

The image displays two screenshots of the 'Account Setup' window. The left window is for account 1210.00, 'Client Cost Advances', an Asset account. In the 'Account Options' section, the 'Advanced Client Costs Account' checkbox is checked and circled in red. The right window is for account 1433.00, 'Accumulated Computers Depreciation', a Liability account. In the 'Statement of Cash Flows Classification' section, the 'Operating' radio button is selected and circled in red.

Accounts Payable Software (APS)

Vendors

- Added the ability to designate a vendor as Inactive.
- Added the ability to exclude inactive vendors from the Vendor lookup window, Vendor List, Vendor Analysis Report, and Vendor labels.

Bank Accounts

- Added the ability to designate a bank account as inactive.

New EFT Transaction Type *****New Feature*****

- Added a new Transaction Type of EFT, making it easy to record invoices that were paid electronically.
- EFTs will appear in reports with a check number of EFT.
- Added an option to include or exclude EFTs on the Check Register.

Print Checks

- The **Select Invoices to Print** feature now displays the number of invoices selected and total amount to pay.
- Added a Tabs3 column that shows if the invoice is paid, unpaid, or not associated to a Tabs3 cost.
- Added the ability to exclude invoices with unpaid Tabs3 cost transactions.
- Speed improvements when printing checks in alpha vendor order.

| Bank | Vendor # | Name | Invoice # | Inv Date | Inv Amount | Amt to Pay | Tabs3 | Description |
|------|----------|--------------------------|--------------|-----------|------------|------------|--------|---|
| ✓ | 1 | 202 Software Technolc | 320559 | 11/26/... | 205.00 | 205.00 | - | Purchase Tabs3 Device Interface Program |
| ✓ | 1 | 204 Clerk of the Distric | | 11/20/... | 150.00 | 150.00 | Paid | Petition for Dissolution of Marriage Filing Fee |
| ✓ | 1 | 250 D & B Real Estate | KEY | 11/13/... | 10.00 | 10.00 | - | Duplicate Key for building |
| ✓ | 1 | 400 Sprint Local & Lor | 402310760011 | 11/20/... | 68.96 | 68.96 | - | November Cell Phone Charges |
| ✓ | 1 | 700 Clean All Janitorial | | 10/26/... | 750.00 | 750.00 | - | Monthly Cleaning Charges (Bi-Weekly Service) |
| ✓ | 1 | 999 Miscellaneous Ver | | 11/23/... | 85.00 | 85.00 | Unpaid | Medical Records |

Post Checks/EFTs

- Renamed the program to include EFTs.

Void Posted Checks/EFTs

- Renamed the program to include EFTs.
- Added the ability to select Check or EFT. The associated lookup window is filtered depending on the selected Type.

Spell Check in Cost Entries

- Added the ability to spell check the Description field in the Cost Entry window used when integrating with Tabs3.
- Added access to the spelling dictionary and spell check options via a new **Maintenance | Dictionary Maintenance** menu.

Check Register

Pre-Check Register

Cash Requirements Report

Invoice by Vendor List

Invoice by Voucher List

- Improved the Tabs3 section of the reports to include the Tcode number, Transaction Type (“E” for Expense or “A” for Advance), and Payment Status (Paid or Unpaid) for each cost transaction associated with a check. This makes it easier to troubleshoot discrepancies when reconciling Advanced Client Costs.

Posted and Unposted Check Register
Firm Name

Bank Account: 1 First Bank

| Vendor # | Name | Voucher # | Invoice # | Inv Date | Inv Amount | Date Paid | Amount Paid | Check Number | Ref # |
|----------|--|-----------|----------------------------|-----------------|------------|-----------|---------------------|--------------|-------|
| 250 | D & B Real Estate Management Company Paperwork | | KEY | 060718 | 25.00 | 060718 | **VOID** | 25657 | 5 |
| 200 | United Parcel Service Overnight document delivery GLS Acct: 1110.00 Operating Account | | 3243387 Journal: 1 Amt: | 050218 50.00 | 50.00 | 050218 | 50.00 | EFT | 3 |
| 200 | United Parcel Service Overnight document delivery GLS Acct: 1210.00 Client Cost Advances | | 3243387 Journal: 1 Amt: | 060118 50.00 | 50.00 | 060118 | 50.00 | EFT | 5 |
| | Client: 1.00 Administrative Account For tracking all Firm and interest adjustments | | | 06/01/2018 | | | TCode: 100 A Unpaid | 50.00 | 2 |
| | | | | Vendor Totals: | 10,847.85 | | 19,846.85 | | |

Invoice by Vendor List
Firm Name

| Voucher # | Invoice # | Inv Date | Due Date | Inv Amount | Disc Amount | Disc Date | Net Amount | 1099 | Ref # | Description | Codes |
|---|-----------|----------|------------------------|------------|-------------|-----------|-----------------|------|-------|-------------------|------------|
| 250 D & B Real Estate Management Company | | | | | | | | | | | |
| | KEY | 060718 | 060718 | 25.00 | | | 25.00 | Y | 4 | Paperwork | 1 |
| | GLS Acct: | 1210.00 | Client Cost Advances | | | | Journal: 3 Amt: | | | 25.00 | |
| | Client: | 850.00 | White/Kelly Divorce | | | | 06/07/2018 | | | TCode: 100 A Paid | 25.00 Arch |
| Vendor Totals | | | | 25.00 | 0.00 | | 25.00 | | | | |

Import Invoices

- Changed the Import Invoices program from an Exclusive function to a Single Access function.

APS Customization

- When integrating APS with Tabs3 and General Ledger System, you now have the ability to configure the software to only display the Tabs3 Cost Entry window after saving an invoice if the GLS account specified for the journal entry is configured as an Advanced Client Costs account. This feature streamlines data entry by eliminating the extra step of having to close the Cost Entry window when entering payables that are not client costs.

1099-MISC Forms

- Added support for printing the state payer ID number in Box 17. This feature is required by Wisconsin. *(Version 18.1.4.878 and later)*

Tabs3 e-File

- New Tabs3 1099 E-file feature, which allows you to submit 1099 information to the [Tabs3 E-file](#) portal.
- Using the Tabs3 E-file portal, you can electronically file, or physically print and mail, your 1099-MISC and 1096 forms with the IRS and to your vendors.
- Can optionally include information from Tabs3 Trust Accounting Software (TAS), with no need to create a merge file.

Trust Accounting Software (TAS)

Entry Lists

- The Entry List at the bottom of the Trust Transaction data entry window has the following improvements:
 - The Description column now displays as much text that will fit in the available space. Previously, the **Description** column was truncated at 50 characters.
 - Hovering over the Description column displays a tooltip with the full contents.

Bank Accounts

- Added the ability to designate a bank account as inactive.

1099-MISC Forms

- Added support for printing the state payer ID number in Box 17. This feature is required by Wisconsin. *(Version 18.1.4.878 and later)*

Tabs3 e-File

- New Tabs3 1099 E-file feature, which allows you to submit 1099 information to the [Tabs3 E-file](#) portal.
- Using the Tabs3 E-file portal, you can electronically file, or physically print and mail, your 1099-MISC and 1096 forms with the IRS and to your vendors.
- Can optionally include information from Tabs3 Accounts Payable Software (APS), with no need to create a merge file.

Miscellaneous Changes

Improvements in the Help About Window

- You can now open the Current Working Directory (CWD) by clicking the **Open CWD** button in the **Help | About** window.

New Database Folder

- The majority of Tabs3 and PracticeMaster data files are now located in a folder named Database within the Current Working Directory.
- As a result of the folder structure change, the PracticeMaster email attachment files (CMARC*.*) have been moved to their own folder, and can now be stored on a separate local drive on the server. This allows firms with large numbers of journaled attachments to free up space on the drive where the Tabs3 Current Working Directory is located. This capability is available to both Platinum and non-Platinum firms.

Data File Integrity Check

- Improved error 145 (User ID Not Defined) to include the User ID on the Error Report to help determine the cause of the error.

New Firm State ID Field

- Added a new State ID field for the firm in System Configuration. This field is used for 1099-MISC Forms and can also be used by Tabs3 Statement Designer, Email Templates, PracticeMaster Document Assembly and Report Writer. *(Version 18.1.4.878 and later)*

Display Print Jobs

- Added a new **Display Print Jobs** menu option under the **File** menu to display the Print Control window.

System Requirements

- The minimum operating system requirements for Version 19 are Windows 7 SP1 or later, and Windows Server 2008 R2 or later.
- Firms using Windows 7 or Windows Server 2008 R2 may need to install a missing Windows patch ([KB2999226](#)) that is required by Version 19. This patch is required for the server and all workstations.
- Internet Explorer 11 or later is required.

Platinum Versions

Accelerated Data File Integrity Check

- In Tabs3 and PracticeMaster, the Data File Integrity Check is now accelerated.

Historic Accounts Receivable

- Added an option to the Tabs3 Detail and Summary Accounts Receivable Reports that will print accounts receivable balances as of a specific date. This option calculates the A/R based on records present in Tabs3, effectively showing what the A/R would have been on the given date, assuming no records have been deleted or modified.

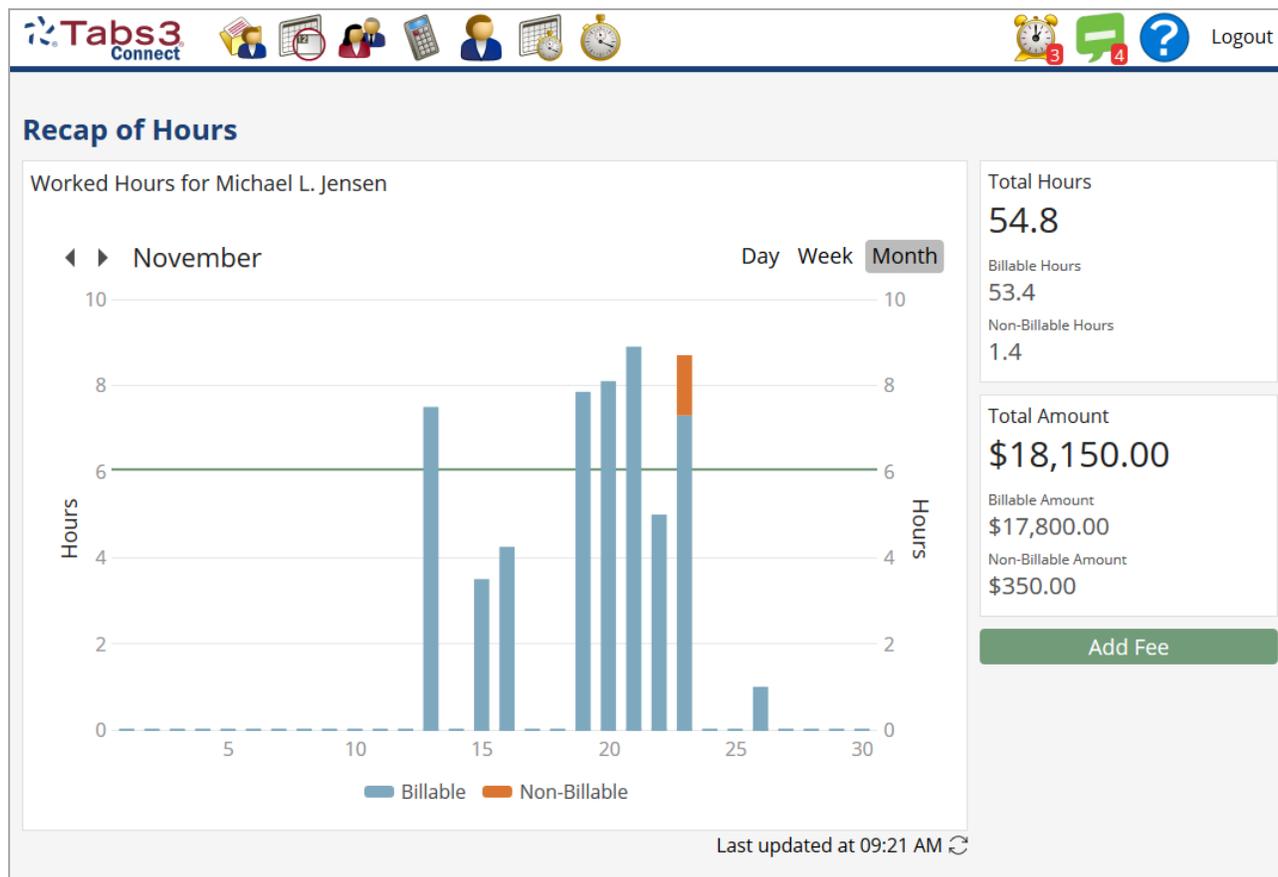
Tabs3 Connect Changes

Updated Interface

- Updated with new icons, a new font, and updated colors.
- Now uses the Open Sans Google font to provide a consistent look between devices and improve readability.

Recap of Hours

- New graphical Recap of Hours widget includes Daily, Weekly, and Monthly options.
- Easily see total hours and amounts broken down by billable and non-billable fees for the timekeeper assigned to the Tabs3 Connect user.
- New Quick Access menu includes Recap of Hours option.



Search Enhancement

- Improved searching now behaves like PracticeMaster when searching for multiple words by performing AND searches instead of searching for the exact phrase. For example, searching for **DEPOSITION SMITH** now finds occurrences of **Deposition of John Smith** whereas before it did not.
- Improved searching applies to the search box on all List pages, the Matter Manager, and all lookup windows.

Data Entry Enhancements

- Easily add fees for any timekeeper using the new Timekeeper field.
- Optionally hide the Timekeeper field on the Fee Entry window by user. This option is configured in System Configuration via the User file in **Tabs3 Connect Settings**.
- Use the new drop-down button in the Fee List to display fees for other timekeepers.
- The Tcode field on Fee and Cost entry windows now defaults to the last used tcode.
- Added the Bill Code field to the Fee and Cost entry windows, allowing users to override the default billable or printable status.
- Changes to the Start Time field on the Calendar entry window now automatically adjust the End Time field to preserve the duration, just like in PracticeMaster.
- If Tabs3 archive records are converted to PracticeMaster as archived fee and cost records, the archived fee records can now be viewed in Tabs3 Connect.