What's New List for Tabs3 Software Version 2023
Including Tabs3 Billing, PracticeMaster, and Tabs3 Financials

Tabs3 Platinum Software Highlights

- **Client Portal** - We've added a client portal to Tabs3 Billing that allows selected clients to access their current balance and billing history with any web browser. When combined with Tab3Pay, clients can submit electronic payments that automatically apply towards their current balance due.

- **Check Requests** - A check request feature has been added to the software allowing you to enter, track, and review requests for reimbursements via PracticeMaster. Those check requests can then be used to create an invoice and generate a check or electronic funds transfer (EFT) in Tabs3 Accounts Payable or Trust Accounting.

- **Outlook Recurring Event Synchronization** - Enhanced the Microsoft 365 Exchange Connector so recurring events created in Outlook will synchronize with the PracticeMaster calendar.

PracticeMaster Highlights

- **Tabs3 CRM** - Easily track and manage potential client leads with Tabs3 CRM (client relationship management). Tabs3 CRM is an add-on service that will help your firm build your business with customized intake forms and marketing automation. Once your firm is ready to take on the client, you can easily create a client in PracticeMaster using an import process. Additionally, the PracticeMaster Conflict of Interest Search can optionally check leads in Tabs3 CRM for conflicts.

- **Contact Categories** - A new access right has been added allowing you to control who can add new Contact Categories. Contact Categories are used in the Contact file to classify contacts by type such as attorney, judge, opposing counsel, etc.

Tabs3 Software Highlights

- **Simplified Update** - Beginning with Version 2023, any necessary data conversions are done automatically during the installation. This means you don't need to perform additional steps prior to using the software, greatly simplifying the update process. Furthermore, if you are currently on Version 2020 or later, updating to the latest version can be done with a single installation.

    See the [Release Notes](#) for additional changes made in Tabs3 Software Version 2023.