Tabs3

Quick Start Guide

Getting you up to speed quickly.

Tabs3 Quick Start Guide

Version 16.2 (September 2012)

Tabs3 Getting Started Guide

Congratulations! You've made the decision to work with Tabs3. 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 Tabs3.

Installation

If you have not yet installed Tabs3, it's easy to do. Simply follow the instructions provided with the CD.

> **More Info – Installation**
> **Printed instructions come with the CD. If you do not have these instructions, a copy is on the CD in the DOCS folder.**

Tip: During the installation of the software, you will be asked if you would like to install the Starter Data. We recommend installing Starter Data for a faster start. Starter data includes transaction codes, statement templates, categories, and more.

Starting Tabs3

1. From the Windows **Start** button, point to **All Programs**, click **Tabs3 & PracticeMaster**, and then click **Tabs3**.
2. You will be asked to enter your User ID and Password at the Logon window. For now, use the User ID of **(BLANK)** with no password; simply leave both fields blank and click **OK**. This temporary User ID is the default Manager User ID. You can set up users in System Configuration after you have set up Tabs3.

Setting Up Tabs3

Tabs3 uses two fields named **Key Type** and **Decimal Places** to determine your client numbering scheme.

There are three different **Key Types**: **Numeric**, **Mixed**, or **Alpha**. Typically the client portion of the Client ID is left of the decimal and the matter number is right of the decimal. The **Decimal Places** determines the number of digits for the matter position. Many firms will use 2 or 3 to start with. It can be enlarged later as needed.

<table>
<tr><td>**More Info – Customization**</td></tr>
<tr><td>**Help Topics**
    •   **Press F1 in the Customization window**
    •   **Click the Index tab and type "Client ID"**

Tabs3 Manual – Chapter 2: Using & Setting Up Tabs3</td></tr>
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- A **Numeric Key Type** allows only numbers in the client and matter portions of the Client ID. 123.45, 20.001, and 5000.110701 are all examples of a Numeric Client ID.
- A **Mixed Key Type** allows alpha or numeric characters in the client portion of the Client ID but only allows numeric characters in the matter portion of the ID. ABC.01, DE12.004, and Smith.110801 are all examples of a Mixed Key Type.
- An **Alpha Key Type** allows both alpha and numeric characters in the client and matter portions of the Client ID. ABC.DE and FG12.H34 are examples of an Alpha Key Type.

There are advantages to using a **Numeric Key Type**. When using a **Numeric Key Type**, the primary advantage is that Tabs3 can automatically assign new Client IDs and Matter IDs. When using a **Mixed Key Type**, Tabs3 can automatically assign new Matter IDs, but not new Client IDs. If you are not sure which Key Type to use, we recommend using a **Numeric Key Type**.

You will need to define your **Key Type** and **Decimal Places** before using Tabs3.

Step 1 – Customize Tabs3

The first time you start Tabs3 after installing the software, the Tabs3 Customization window will be opened. The Customization window consists of several tabs. There are a few fields that must be set before proceeding.

Configuring the Tabs3 Customization Window
1. Start Tabs3. The Customization window will be opened automatically.
   Tip: If the Customization window does not open automatically, use the *Utilities | Customization* menu to open the window, and see the note following these procedures for more information.
2. On the **Main** tab:
   a. Specify the desired **Key Type** and **Decimal Places** as described above.
   b. Specify the **First Month of Reporting Year** field. Most firms use January, but some firms' fiscal year starts with a different month. *(Note: This month is different than the current reporting month.)*
3. On the **Options** tab:
   a. Specify whether you want statements numbered at the firm or client level in the **Statement Numbering** field. *(Note: We recommend numbering at the firm level so you can easily search by statement number when entering payments.)*
4. On the **Rates** tab:

        a. If your state requires you to charge sales tax on services, expenses, or advances, select the corresponding check box and enter the tax rate in the Rate 1 field.

        b. If you would like to charge finance charge on past due balances, select the corresponding check boxes and enter the annual rate in the Rate 1 field (e.g., enter 12.00 if you charge an annual finance charge of 12% per year).

5. On the **Client Defaults** tab:

        a. Specify the defaults that will be used when adding a new client.

        b. If assessing sales tax, under the Sales Tax section, select the default sales tax rate.

        c. If assessing finance charge, select the **Assess Finance Charge** check box, the **Rate**, and the number of **Days** past due before the finance charge will be assessed.

6. Click 💾 to save the changes, then close Customization.

Note: If the Customization window was previously saved, the window will not be opened automatically. Once Customization is saved, the **Key Type**, **Decimal Places**, and **First Month of Reporting Year** fields will be dimmed and must be changed using the **Change Key Type** or **Change Beginning Reporting Month** programs.

Entering Firm Information for Statements & Reporting Purposes

Use System Configuration to enter your firm's name for reporting purposes. System Configuration includes configuration for Tabs3, PracticeMaster and Tabs3 Financial Software. Your firm's name and address information is also used for statements.

1. Start Tabs3.
2. From the Application Toolbar, click the System Configuration toolbar button as shown in the image on the right.
3. The System Configuration window will be opened. From the **File** menu, point to **Open** and select **Firm**.
4. Enter your Firm's name and other information.
5. Click 💾 to save the changes.
6. Close the System Configuration window.

Tip: System Configuration is also used to create user accounts and define privileges for individual users who will be using the software.

Tip: See **Statement Designer** for more information on customizing statements.

More Info – Firm Information
Help Topics – Press F1 in the Firm Information window
System Configuration Manual – Chapter 2: Data Entry

Step 2 – Add Timekeepers & Rates

Next, you need to set up timekeepers. Timekeepers are the individuals in your office whose time is billed to clients.

To add timekeepers
1. From the Tabs3 Task Folders, click **Setup** and then click **Timekeeper**.
2. From the **Timekeeper** tab:

        a. Press *Ctrl+N* to add a new timekeeper number.
           Tip: Most firms use "1" for the senior partner.

      b. Click the drop-down arrow in the Level field to select the timekeeper level.
          Tip: Additional levels can be defined via ***Setup | Timekeeper Level Description***.

      c. Enter the timekeeper's name (e.g., John J. Smith).

More Info – Timekeepers & Rates
Help Topics – Press F1 in the Timekeeper window
Training Videos – Billing Video Library | How Rates Work
Tabs3 Manual – Chapter 3: Billing Methods & Other Features Hourly Billing

      d. Enter the timekeeper's initials (e.g., JJS).

3. In the **Rates** section:
      a. Enter the timekeeper's default hourly billing rate in the Rate 1 field.
      b. You can use Rate 2 for a premium rate, discounted rate, court rate, etc. However, it is best to use Rate 2 consistently for all timekeepers. For example, if Rate 2 is the court rate, make sure Rate 2 is the court rate for all timekeepers. Enter any additional rates as desired.
4. Click 🖫 to save the changes.
5. Add additional timekeepers as needed by repeating steps 2 through 4.

Tip: Custom billing rates can be set up at the client level. See **Fee Rate Tables** for more information.

Using Tabs3

Once you've set up your timekeepers and rates, you're ready to add clients and fees, and then run statements.

Step 3 – Add Clients

Clients are added to Tabs3 using 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.

To add clients
1. From the **Main** Task Folder, click the **Client** icon.
2. **Address** tab:
      a. Press *Ctrl+N* to add a new client.
          i. The New Client Record window will be displayed. Select the desired option for the Client ID you want to use to identify the client.
          ii. Click **OK**.

More Info – Clients & Contacts
Training Videos – Clients & Contacts Video Library (8 videos)
Help Topics – Press F1 in the Client or Contact window
Tabs3 Manual – Chapter 3: Data Entry

      b. Enter the **Client Name** (e.g., Jones/Mary T. or United Insurance Company).
      c. A Contact Information window will be displayed allowing you to enter the address and phone information for the contact. Enter the desired information and click 🖫 to save the changes.
      d. After saving the contact information, you are returned to the **Address** tab of the client file with the contact information already filled in.

3. On the **Setup** tab, specify the desired Billing Category and Primary Timekeeper.
4. On the **Billing Preferences** tab, under Statement Delivery Options, double-click the first record in the table. This is where you designate whether the client will receive a printed statement and/or an e-mail statement.
5. Click **OK** to close the Bill To Record and then click 💾 to save the changes.

Tip: When entering information for a potential client, enter the information in a Contact record. Then, when the contact becomes a client, use the contact record to populate the client record. You can access the Contact file using the **Contact** icon on the **Main** or **Client** Task Folders.

Step 4 – Add Fees & Costs ⏱ 🧮

Fees and costs are entered using the Fee and Cost programs.

To add fees
1. From the **Main** Task Folder, click the **Fee** icon.
2. By default, the last accessed client ID is used for the default. Select the desired client by doing one of the following:
   - Press Enter to accept this client ID.
   - Type in a different client ID.
   - Click the drop-down button to select a different client from the Client Lookup window.
3. Press Enter in the **Reference** field to add a new fee.
4. Select the desired **Timekeeper**.
5. Enter the desired **Date**.
6. Click the drop-down button in the **Tcode** field to select the desired tcode. Tcodes represent a type of service or activity.
   Tip: Tcodes are optional. If desired, use tcode 1 and type your own description.
   Tip: Right-click the **Tcode** field and select **Edit Transaction Code** to add or edit tcodes.
7. Enter the **Hours Worked**. For example, 15 minutes would be entered as .25 hours.
8. After selecting the desired tcode, the default tcode description will be used in the Description field. Edit this field as desired.
   Tip: Use tcodes or Tabs3 text macros to create commonly used phrases or paragraphs to aid in faster data entry.
9. Click 💾 to save the changes.

More Info – Fees
Training Videos – Adding Fees   **Recap of Hours** **Help Topics – Press F1 in the Fee window** **Tabs3 Manual** – Chapter 3: Data Entry

Detail vs. Rapid Entry Mode

The Fee Entry program has a detail mode and a rapid mode. The steps above use the fields in Rapid mode. Let's take a look at Detail mode.

- While in the Fee window, click the **Detail/Rapid** 📋 button.

When in Detail mode, additional fields are shown above the Description including the Hours to Bill, Rate, and Amount fields. Furthermore, additional fields are shown below the Description field including

Category, Bill Code, Rate Code, Status, Sales Tax, User ID, and Date Entered. When you are in Rapid mode, the text **Rapid Fee** is shown in the title bar.

Fee Entry List

You can see a list of fee transactions by using the **Toggle List** button (or *Alt+G*). Notice that the transaction you saved is shown in the list. If you want to edit the transaction, simply double-click the entry to retrieve it in the data entry form. After making any changes, click to save the changes.

Recap of Hours

While in the Fee program, click the **Recap of Hours** button to view a Recap of Hours window. This window shows the cumulative hours worked for the specified timekeeper on any given day. This makes it easy for timekeepers to see whether any time entries are missing.

Tip: From the **Transactions** Task Folder, click the **Recap of Hours** icon to run a Recap of Hours Report for any time period. This report shows a calendar with the number of billable and non-billable hours for each day by timekeeper.

Verification Lists

When you close the Fee program, you will be given the opportunity to print a Verification List. Verification Lists are optional and include a list of the transactions that were entered, changed, or deleted during the session. Verification Lists are also available for the Cost and Payment data entry programs.

Working with Costs

In Tabs3, costs are classified as expenses or advances. Expenses are "soft" or "indirect" costs, whereas advances are "hard" or "direct" costs. Costs are classified differently for accounting and tax purposes. Examples of expenses include photocopy expenses, long distance, postage, etc. Examples of advances include filing fees, witness fees, medical costs, etc.

Tip: You can show expenses and advances separately on the statement, or you can combine them.

To add costs
1. From the **Main** Task Folder, click the **Cost** icon.
2. Enter the desired client ID.
3. Press Enter in the **Reference** field to add a new cost.
4. Enter the desired **Date**.
5. Click the drop-down button in the **Tcode** field.
   a. Notice that the list of tcodes is different for costs. This is because each tcode is assigned a Fee, Expense, or Advance attribute when it is defined. Notice the Type column in the Tcode lookup window shows E or A, thus indicating whether the tcode is an expense or advance.
   b. Select the desired tcode.
6. Notice a **Units** and **Rate** field is available. These fields can be used for mileage or photocopies, for example.
7. Enter the **Amount**.

More Info – Costs
Training Videos – Adding Costs
Help Topics – Press F1 in the Cost window
Tabs3 Manual – Chapter 3: Data Entry

8. Enter the **Description**.
9. Click 🖫 to save the changes.

Like the Fee Entry program, you can use the **Detail/Rapid** 🖳 button to toggle between Detail and Rapid Mode. You can use the **Toggle List** 🖹 button to hide or display a list of costs at the bottom of the window. When you exit the Cost Entry program, you will be given the option to print a Cost Entry Verification List.

Step 5 – Run Statements 🗐

Once all fees and costs have been entered, you can run a statement for the client.

To run a statement
1. From the **Statements** Task Folder, select **Generate Statements**.
2. On the **Client** tab, specify the desired client for the beginning and ending Client ID, or leave these fields blank to print statements for all clients.
3. On the **Transactions** tab, you can specify a cut-off date for fees and costs if desired.
4. On the **Options** tab, select **Draft**. We want to run a draft statement for review purposes.
   Tip: Select the **Print Reference Numbers** check box to include reference numbers on statements to assist with selecting individual transactions for editing purposes.
5. Click **OK**.
6. You can either print or preview the statement. Click **Preview** to review the statement on screen.

When reviewing the statement in the Preview window, you can easily modify any transaction by moving your mouse over the transaction description, then clicking it when it turns yellow. After saving any changes to the transaction, you will be returned to the statement. Click the **Refresh** button at the bottom of the Preview window to refresh the statement with your changes.

Changing the Statement Format

Statement format is controlled by statement templates. Each client is assigned a statement template for draft statements and one for final statements. Tabs3 also includes a Statement Designer that provides the ability to create customized page layouts for your Tabs3 statements. Once designed, page layouts can be applied to one or more statement templates.

More Info – Statements

Training Videos
    • **Statements Overview**
    • **E-mailing Statements**
    • **Customizing Statements**
 	
 Help Topics
    • **Type Statements on the Index tab and select Overview**
    • **Press F1 in the Generate Statements, Statement Designer, and Statement Templates windows**
 	
 Tabs3 Manual – **Chapter 6: Statements**
         Sample Reports Chapter includes statement examples
 	
 Knowledge Base Article R11338 – E-mailing Tabs3 Statements
      http://www.support.Tabs3.com/main/R11338.htm

Let's say after reviewing the statement, you want to change the format of the fees so it shows hours and rates. The statement format can be changed via the Client file. However, if you still have the statement displayed in the Preview window, you can open the Client file by moving the mouse over the **Account No.** at the top of the statement and clicking it when it turns yellow.

To change the statement format
1. Open the Client File by doing one of the following:
   - When previewing a statement, mouse over the **Account No.** at the top of the statement and click it when it turns yellow.
      …or…
   - From the **Main** Task Folder, click **Client**.
2. Click the **Statement Options** tab.
3. Right-click in the **Draft Template** field (or **Final Template** field) and select **Edit Statement Templates**.
4. Click the **Fee Format** tab.
5. Under the Include section that is right of the Fee Format section:
   a. Select the **Rate** check box.
   b. In the **Hours** drop-down list, select **Detail**.
6. After making all changes to the statement template:
   a. Press *Ctrl+S* to save the changes.
   b. Close the Statement Template window.
   c. Close the Client window.
7. Rerun the statement. If you are still in the Preview window, simply click the **Refresh** button to rerun the draft statement.

Tip: Keep in mind that changing the statement template affects *all clients* that use that template.

Generate a Final Statement

Once you approve the draft statement, you must run a final statement. This can be done the same way the draft statement was run by changing the Statement Type from **Draft** to **Final** on the **Options** tab. Or, it can be run using the Pre-Bill Tracking window.

Generating a Final Statement via Pre-Bill Tracking
1. From the **Statements** Task Folder, click **Pre-Bill Tracking**.
2. Highlight the desired client ID.
3. Click the **Reviewed** button at the bottom of the window to indicate the statement was reviewed.
4. Click the **Final Statements** button to generate a final statement.
5. Click **OK**.

Pre-Bill Tracking

The Pre-Bill Tracking window makes it easy to track the status of statements. When draft statements are run, a statement record for that batch of statements is added to the Pre-Bill Tracking window. As draft statements are reviewed, you mark them as reviewed or on hold. You can then easily run final statements directly from the Pre-Bill Tracking window for all statements that have been reviewed. The Pre-Bill Tracking window provides a centralized location that shows the status of all pending statements.

Tip: Some firms prefer to use Detail Work-In-Process Reports instead of draft statements to review information before billing. Running Detail Work-In-Process Reports also adds statement records to the Pre-Bill Tracking window.

More Info – Pre-Bill Tracking
Training Videos – Pre-Bill Tracking Video
Help Topics – Press F1 in the Pre-Bill Tracking window
Tabs3 Manual – Chapter 6: Statements: Pre-Bill Tracking

Step 6 – Update Statements

Now that the final statement has been generated, you must update the statement using the Update Statements program. This process finalizes the statement and sends the information to accounts receivable and other productivity reports.

To update a statement
1. From the **Statements** Task Folder, click **Update Statements**.
2. If prompted to make a backup, click **Yes**.
3. After the backup completes, the Update Statements window will be displayed. Specify the desired client ID you want to update, or leave the fields blank to update all final statements for all clients.
4. Click **OK**.

Step 7 – Print Accounts Receivable Report

When statements are updated, the information is updated to accounts receivable and other reports. Let's look at an accounts receivable report.

To print a Summary Accounts Receivable Report
1. From the **Accounts Receivable** Task Folder, click **Summary A/R Report**.
2. *On the **Client** tab, specify the desired client (or leave the Client ID fields blank to select all clients).*
3. Click the **Options** tab and select any desired options.
4. Click the **Format** tab and select any desired options.
5. Click **OK**.
6. Click **Preview** when the Print Summary Accounts Receivable Report window displays.
7. After you've finished viewing the report, click the **Close** button at the bottom of the Preview window. You will be returned to the report window allowing you to run another report if desired.

More Info – Reports
Training Videos   • **Reports Overview**   • **Detail and Summary Accounts Receivable Reports**   **Help Topics – Press F1 in the Accounts Receivable Report window**   **Tabs3 Manual**   • **Chapter 7: Reports**   • **Sample Reports Chapter**

Tip: There are other accounts receivable reports available on the **Accounts Receivable** Task Folder.
Tip: After clicking the Task Folder icon for any report, press F1 while in the criteria selection window for the report. In the heading bar of the help topic, click the icon. This icon opens the Sample Reports, which shows an example of the report and provides detailed information for every item on the report.

Step 8 – Enter Payments

Upon receipt of a client's payment, you need to enter a payment transaction.

To add payments
1. From the **Main** Task Folder, click the **Payment** icon.

2. Enter the desired Client ID.
   Tip: Notice that the client's accounts receivable balance is shown at the bottom of the window after specifying the Client ID.
3. Press Enter in the **Reference** field to add a new payment.
4. Enter the desired **Date**.
5. Click the drop-down button in the **Tcode** field and select the desired tcode.
6. Enter the **Amount**.
7. Enter the **Description**.
8. Click 🖫 to save the changes.

More Info – Payments
Training Videos – Adding Payments, Credit Card Processing, Receipt Allocation, Payment Types, Method to Apply Payments, Manual Payment Allocation
Help Topics – Press F1 in the Payment window
Tabs3 Manual – Chapter 3: Data Entry

Once the payment is entered, the accounts receivable automatically reflects the payment. However, in order to process the payment, a final statement must be run and updated that includes the payment. This typically occurs when the next statement for the client is run. If no other work will be performed for the client, then you can run a payment-only statement.

Tip: You can run a report of all cash receipts *(Reports | Management | Cash Receipts Report)*.

Step 9 – Client Manager

The Tabs3 Client Manager shows client contact information, balance due information, work-in-process information, and the date of the last statement and payment. You can launch the reports you run most often for individual clients. The PracticeMaster button launches the Matter Manager in PracticeMaster, which provides quick access to other case related information.

To launch the Client Manager, do one of the following:

- From the **Main** Task Folder, click the **Client Manager** icon
- From the **File** Menu, select **Client Manager**
- Press *Ctrl+M*

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 and PracticeMaster include numerous training videos to help you learn the software. Training video libraries are installed with the software and can be accessed via the software from the *Help | Training Videos* menu option.

Help ![help icon]

Help is installed with the software and is easily accessed by pressing F1, by clicking the ![icon] button, or by selecting the *Help | Help Topics* menu option. Help includes detailed information regarding specific programs. Clicking the ![icon] 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.

Manual ![manual icon]

The Tabs3 manual is installed with the software in PDF format. Shortcuts are created during installation. From the **Start** menu, point to *Tabs3 & PracticeMaster | Documentation | Tabs3 | Tabs3 Manual*. The manual includes information on basic setup and use of the software. It provides an overview for all features in the software. Manuals can also be accessed via our Web site at http://www.Tabs3.com/support/docs.html.

Tabs3 Reports ![reports icon]

The Tabs3 Reports packet is installed with the software in PDF format along with the manuals. Tabs3 has dozens of reports and this packet makes it easy to see examples of each report. Many firms will print this packet as a reference guide for the various reports to help familiarize them with what is available.

Knowledge Base ![KB icon]

Tabs3 and PracticeMaster publish an extensive Knowledge Base on the Internet with advanced information. It 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 www.support.Tabs3.com/.

For example, as a new Tabs3 user, you may want to learn more about Tabs3. Knowledge Base Article R11103, "Tabs3 Frequently Asked Questions," provides numerous questions and answers on various areas of the software. 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.

Technical Support

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

> *Reliable software. Trusted service.*

Technical 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 Technical Support staff at (402) 419-2210.

Tabs3 Resellers & Consultants

Tabs3 and PracticeMaster products are available through a national network of over 250 resellers and consultants. Those resellers and 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 resellers and consultants service all 50 states, you can work directly with a local person familiar with Tabs3 and PracticeMaster software, who can provide personalized on-site installation, training, and support services. Visit our Web site at www.tabs3.com/resellers/resellers.html for a reseller near you or contact our Sales staff at (402) 419-2200.

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

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