



# User Newsletter

August 2009 | Vol. 15, Number 8

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## Trade Show Schedule:

Look for us at these upcoming trade shows:

**State Bar of California**  
Manchester Grand Hyatt  
September 10 - 12  
San Diego, CA

**ALA Region 6**  
DoubleTree Sonoma  
September 26  
Rohnert Park, CA

**ALA Region 4**  
Crowne Plaza Riverwalk  
October 2  
San Antonio, TX

Please visit:

[www.tabs3.com/company/trade\\_show.html](http://www.tabs3.com/company/trade_show.html)  
for a complete list of upcoming shows.

### Feature Article:

#### Quick Clicks: Information at Your Fingertips

Right now, if you don't use practice management software, you may have to sift through a pile of documents to find the information you need for a new case. Wouldn't it be easier to let practice management software do this for you?

[Read more Quick Clicks on page 2](#)

### Product Spotlight:

#### Trust Accounting Software

If it is necessary for you to track your fund activities more thoroughly, such as tracking payees, automatic check writing, check registers, and reconciliation, it may be time for you to consider Tabs3 Trust Accounting Software (TAS).

[Read more Product Spotlight on page 3](#)

### Announcements:

#### Effective January 2010: No Longer Supporting Version 11

As of January 1, 2010, STI will no longer provide telephone support for Version 11 of Tabs3 Billing and Financial Software or PracticeMaster Software.

[Read more Version 11 on page 4](#)

#### Novell NetWare

Starting with Version 16, which is currently scheduled for release in 2010, Tabs3 and PracticeMaster software will no longer be tested on Novell networks.

[Read more Novell on page 4](#)

#### New Invoicing System

You may have noticed that your current maintenance invoice looks a little different. This is because we recently implemented a new invoicing system.

[Read more Invoicing on page 8](#)

### KB Corner:

#### Working with Indexes in PracticeMaster

Just as Quick Clicks can help you tidy up your file data, indexes can make searching your files even faster! There are two kinds of indexes you can use: Temporary and Permanent.

[Read more KB Corner on page 4](#)

### Questions and Answers:

#### Tabs3 Billing Software Topics

Non-Billable Hours on Statements; Tracking Write Offs; Hiding Hours and Rate Values on Statements; Cost Recovery Startup Options; Defaults for New Clients

[Read all Tabs3 Q&A's starting on page 5](#)

#### PracticeMaster Topics

Calendar Time Interval; Marking Multiple Tasks as Completed; History Tracking Message; Recurring Dates

[Read all PracticeMaster Q&A's starting on page 7](#)



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## Tabs3 and PracticeMaster win Law Technology News® awards!



**Tabs3:** Time and Billing Software for Small and Mid-Sized Firms (up to 99 attorneys).

**Tabs3 and PracticeMaster:** Practice Management Software.



**Tabs3 and PracticeMaster:** New Product of the Year (for Version 14.3).

**PracticeMaster:** Case Management Software for Small and Mid-Sized Firms.

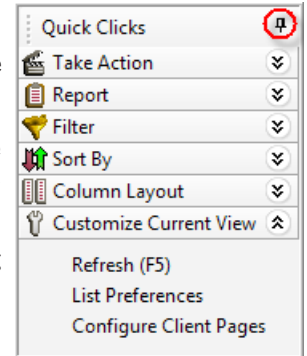
Thank you to everyone who voted for Tabs3 and PracticeMaster in this year's awards!

[Read the full press release here.](#)

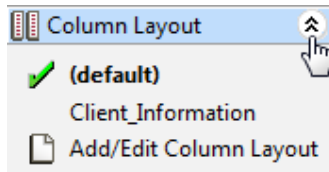
## Feature Article:

### Quick Clicks: Information at Your Fingertips

Right now, if you don't use practice management software, you may have to sift through a pile of documents to find the information you need for a new case. Wouldn't it be easier to let practice management software do this for you? Rather than flipping through a day planner, you can open a program and have information at your fingertips. At the time of purchase, the Tabs3 software is provided with a free single user license of PracticeMaster Basic that can do this for you! Open the PracticeMaster Client File and click the Quick Clicks pin icon to display and begin using all of the features available in the Quick Clicks pane. Read on to find out how Quick Clicks can help you find the information you need – fast!



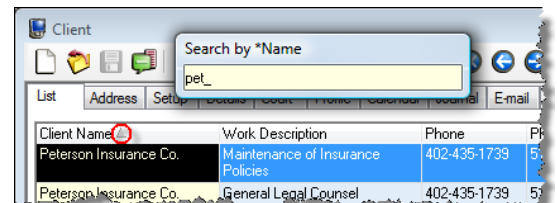
First things first – an easy change is to customize the view of the List window. Using **Configure Client Pages** in the Client file, you can select which tabs will be displayed, making scanning the client file quicker than ever. Also, your List Preferences can be changed using the **Customize Current View** group of the Quick Clicks pane. For instance, you can choose the colors of your rows and how many lines will display for each row, allowing you to fit more information per file into the List window. Now that you can see more information per file, it may be important to select which columns will be displayed in your column layout.



A quick way to organize your List window for any file is to change the column layout. To do this, expand the **Column Layout** group of the Quick Clicks pane. A simple click lets you switch to a predefined column layout, or use the **Add/Edit Column Layout** option to create a new column layout that brings the information you want to the front of the list. You can maintain

different column layouts to easily display pertinent information according to what is necessary at the time. For instance, you may want to display different columns depending on whether you are looking for client phone numbers or work descriptions. The best part of using a custom column layout is that it displays your most important columns first, which makes using the incremental search even easier.

What is incremental search? Click the Client Name column header and start typing. An incremental search window will be displayed that searches the **Client Name** field in the Client file for matches to the characters entered. If you want to search based on another



piece of information, you can click the respective column header to move the triangular sort indicator, as shown, and begin typing. A similar window will be displayed, allowing you to search the field according to the characters entered. By clicking the column header of the column you want to search, you are creating a temporary index, which will then be displayed in the **Sort By** group of the Quick Clicks pane. Permanent Indexes are also displayed in this group. Information on creating and editing indexes is provided in KB Article **R11207**, "Working with Indexes and Filters in PracticeMaster." Using the incremental search can be a very fast option, but what if you have an organizational need that is a bit more constant, like wanting to see only your active clients? In this situation, a filter will better suit your needs.

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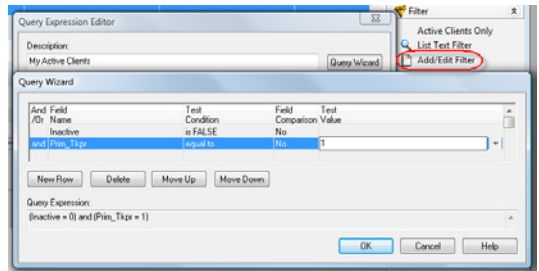
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### Quick Clicks...Continued

If you want to see only particular data in the Client file, filtering for certain criteria is a great option. To begin, expand the **Filter** group of the Quick Clicks pane. Here you have three options: using a text filter, adding a new filter, or using a predefined filter. If you want to search text from all fields in the column layout, click **List Text Filter**

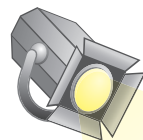


and enter your search word or phrase. What if you only want to view your clients who are still active? Click **Add/Edit Filter** and use the Query Wizard to create a filter that narrows the records in your List window to active clients with your timekeeper number listed in the **Primary Timekeeper** field, as shown in the image. Additionally, each PracticeMaster file has different options within certain Quick Clicks groups. For instance, if you are viewing the Related Party file and want to display all “witnesses,” click **Related Party Category** and select the **Witness** category. Making use of Quick Clicks filters can be an easy way to sift through what might otherwise be a thick file in a filing cabinet.

Now that you can see how to set up data files to display only what you want for any given criteria, additional step-by-step information can be found in the PracticeMaster Help topic, “Quick Clicks Pane,” or in the Multimedia Tutorial “Navigating and Quick Clicks.” If you have any questions regarding the Quick Clicks pane, contact our Technical Support Department at (402) 419-2210. Check out Quick Clicks today and bring your practice management information to your fingertips!

### Product Spotlight:

#### Trust Accounting Software



The Client Funds feature in Tabs3 billing software lets you keep track of a client’s escrow or trust fund balance and manually or automatically apply payments from Client Funds to the client’s billed fees, costs, and finance charges. However, if it is necessary for you to track your fund activities more thoroughly, such as tracking payees, automatic check writing, check registers, and reconciliation, it may be time for you to consider Tabs3 Trust Accounting Software (TAS). Installing TAS with Tabs3 automatically mirrors your Tabs3 Client file so that you will not have to re-enter client information for each client’s trust account. Instead, simply enter the bank account you want the client to use and you are ready to start tracking trust activity in TAS.

TAS also performs these additional functions:

- Print checks from a client’s trust account to any payee, including the firm.
- Track amounts paid by trust account, bank account, and payee.
- Print 1099 forms for payees.
- Print a variety of check registers and detailed reports.
- Reconcile trust bank accounts to bank statements.

All of these features consolidate your trust activities and allow you to take a closer look at how your firm handles each trust client. If you want more information about TAS, take a look at the trial software included on your Tabs3 and PracticeMaster CD, contact your local reseller, or call our Sales Department at (402) 419-2200.

**Microsoft®**  
**GOLD CERTIFIED**

*Partner*

Software Technology, Inc., is a  
Gold Certified Partner in the  
Microsoft Partner Program

[Read the full press release here.](#)



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Tabs3 has partnered with Nelco to offer you checks and forms that are guaranteed to work with **Tabs3 Accounts Payable** and **Trust Accounting Software**. Nelco also offers a wide variety of supplies essential to running your firm.

Give our dedicated Tabs3 Representative, Andy Thompson, a call at 800.266.4669 ext. 4333.

[www.nelcosolutions.com/tabs3/](http://www.nelcosolutions.com/tabs3/)

**30% off**

Get 30% off of your first order!  
Refer to Promo Code 31L when ordering to receive your discount.

## Announcements:

### Effective January 2010: No Longer Supporting Version 11

As of January 1, 2010, STI will no longer provide telephone support for Version 11 of Tabs3 Billing and Financial Software or PracticeMaster Software. If you are still using an older version of the software, now is the perfect time to get up-to-date with the latest version of Tabs3 and PracticeMaster software. You will be surprised at the number of features you've been missing! Our Knowledge Base includes What's New Lists for Versions 15, 14, and 12. Simply visit <http://www.support.Tabs3.com> and click the "What's New in Tabs3 and PracticeMaster Software" link.

If you have any questions regarding the discontinuation of support for Version 11, please contact your local reseller, consultant, or a member of our Sales department at (402) 419-2200.

## Novell NetWare

Starting with Version 16, which is currently scheduled for release in 2010, Tabs3 and PracticeMaster software will no longer be tested on Novell networks. Novell users will, however, receive a basic level of support from our Technical Support department, including guidance and how-to information regarding Tabs3 and PracticeMaster software functions. If you are currently operating on a Novell network, please see KB Article **R11262**, "Statement on Novell NetWare Compatibility," for more information.

## KB Corner:

### Working with Indexes in PracticeMaster

Just as Quick Clicks can help you tidy up your file data, indexes can make searching your files even faster! There are two kinds of indexes you can use: Temporary and Permanent. The first, and easiest to implement, is called a Temporary Index. You actually do this each time you click a column header to sort a file. These may take a while to sort, however, because they search the entire data file and are only stored for the current user during the current data entry session. A little more challenging, but ultimately more rewarding, are Permanent Indexes. These are available to all users, and up to four sort values can be defined. This means, for example, that not only can you sort by Primary Timekeeper, but you can then sort by Date Opened, Work Description, and Client ID. The best thing about Permanent Indexes is that they are fast!

Permanent Indexes may be a little intimidating at first. They are created in File Maintenance and you get to choose exactly how each data file is indexed. To help you out, we have created KB Article **R11207**, "Working with Indexes and Filters in PracticeMaster." This KB Article walks you step-by-step through the initial set up of indexes in PracticeMaster. Once set up, all users have access to specific indexes so that the most important information is readily available for each data file. Once an index has been created, it can also speed the actions of Filters created within PracticeMaster files. For example, if you have indexed the Client file to sort first by Primary Timekeeper, and you set up a filter in the Client file to only show Timekeeper 3's clients, the index will greatly increase the efficiency of the filter. Take a look at **R11207** today to see how you can take advantage of the benefits of indexing!

Our Knowledge Base is available 24 hours a day, 7 days a week. You can visit our Knowledge Base at <http://www.support.Tabs3.com/>.



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## Questions and Answers:

### Tabs3 Billing Software

#### Non-Billable Hours on Statements

***When printing a statement that includes non-billable fees, only "n/c" is printed in the Amount column. How can I also show the number of hours for each non-billable transaction?***

You can print hours for non-billable fees by updating your Statement Customization options. However, the non-billable fee transactions need to have hours associated with them for this procedure to work.

#### To print hours for non-billable transactions

1. From the Tabs3 **File** menu, point to **Open** and select **Fee**.
2. Enter the Client ID that has non-billable fee transactions.
3. In the Fee Entry List, make sure the **Hours to Bill** column has a value displayed for each non-billable transaction.
4. From the Tabs3 **Statements** menu, point to **Statement Setup** and select **Statement Customization**.
5. From the **Options** tab, select either **Printable Only** or **Both Printable and Non-printable** for the **Print Non-Billable Hours** option. (**Note:** If you choose **Printable Only**, only transactions with the **Non-billable/Printable Bill Code** will be included in the **Total for Non-billable Hours**. If you choose **Both Printable and Non-printable**, both types of transactions will be included in the **Total for Non-billable Hours**. This line will only print on your statements if it is selected for the current Statement Template (**Statements | Statement Setup | Statement Templates**).)
6. Press **Ctrl+S**.

Now you will want to preview a draft statement to confirm that the hours for each non-billable transaction are displayed in the **Hours** column.

#### Tracking Write Offs

***Is there a way to see the total amount of write offs that a client has to date?***

Yes, there is. This information can be found by running a Client Ledger Report for write offs only.

#### To generate the Client Ledger Report

1. From the Tabs3 **Reports** menu, point to **Management** and select **Client Ledger Report**.
2. On the **Client** tab, enter the Client ID.
3. On the **Options** tab, clear the **Beginning**, **WIP Pymt Cut-Off**, and **Ending Date** fields.
4. Select the **Write Offs Only** check box.
5. On the **Sort** tab, select the **Totals Only** check box.
6. Click **OK**.

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### Tabs3 Q&A...Continued

#### Hiding Hours and Rate Values on Statements

**When generating a statement for a flat fee billing client, the statement shows the hours and the rate for each transaction. How do I remove the hours and rate, and only print the total amount?**

To generate a statement that only shows the amount of the adjusted fees, you will need to change the client's statement template.

#### To create a new statement template for this client

1. From the Tabs3 **Statement** menu, point to **Statement Setup** and select **Statement Templates**.
2. Click the **New** button to create a new statement template.
3. Enter a new Template ID (such as "FlatFee").
4. On the **Fee Format** tab, click the **Hours** field and select **No Hours**.
5. Click the **Amount** field and select **Totals Only**.
6. Clear the **Rate** check box.
7. On the remaining tabs, select how you want costs and payments to print.
8. Press **Ctrl+S** to save your changes.

Once the new statement template has been created, you will need to assign it to the client. Open the client (**File | Open | Client**). On the **Statement Options** tab, change the **Draft** and/or **Final** fields to use the new statement template.

#### Cost Recovery Startup Options

**We use the Tabs3 Device Interface to convert photocopier information to be imported into Tabs3. Is there a way to streamline the conversion process so the software automatically chooses the device from which I am converting?**

Yes, there is! You can use Startup Commands in the Tabs3 Device Interface icon so that it will automatically follow these commands upon startup.

#### To set up startup commands for the Tabs3 Device Interface icon

1. Right-click the Tabs3 Device Interface icon and select **Properties**.
2. Add the following text to the end of the **Target** field: [User ID] \CONVERT [Device Name]
  - Your Tabs3 Device Interface icon **Target** field should look similar to the following: **C:\Program Files\Tabs3\TBDEVICE.EXE JSMITH \CONVERT ASCII VARIABLE**
  - **Note:** Provided you do not use a password, adding your User ID allows the software to bypass the User/Password window. Also, the device name must match the complete name of the device you want to convert, and the device must already be configured in the Tabs3 Device Interface.
3. Click **OK** to save the changes to Properties.

Double-click the icon to automatically convert your photocopier information to be imported into Tabs3.

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**\$150<sup>00</sup>**

With your copy of  
**Tabs3**

(which includes a single-user version  
of PracticeMaster Basic)

you will receive a  
\$150.00 credit when  
you upgrade to:

**PracticeMaster  
Premier**

[Click Here For Details!](#)



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## Tabs3 Q&A...Continued

### Defaults for New Clients

#### *How can I set up default client options for all new clients?*

You can enter client information defaults for all new clients using Tabs3 Customization. These options determine the setup for Client Information tabs, including Setup, Billing Options, Billing Preferences, and Statement Options. Tabs3 Customization is an exclusive task; therefore, no other tasks can be active while setting up new client defaults.

#### To set client defaults

1. From the Tabs3 **Utilities** menu, select **Customization**.
2. On the **Client Defaults** tab, select any options you want to be included for all new clients.
3. Press **Ctrl+S**.

**Note:** Any changes made will not affect clients that have already been entered. If desired, you can use the Change Client Options program to change options for existing clients.

## Questions and Answers:

### PracticeMaster Software

#### Calendar Time Interval

#### *I want to use the daily calendar but need to change the default time intervals to something smaller than 15 minutes. How can I do this?*

This can be done by first opening Calendar Properties (**Calendar / Calendar Properties**). On the **Daily** tab, select the Time Interval desired. The **Time Interval** field can be set to any value in the drop-down list. The values in the list include 5, 10, 15, 20, 30, and 60 minutes. Select 5 or 10, and click **OK** to save your new interval.

#### Marking Multiple Tasks as Completed

#### *Is there a way to mark all tasks for a single client as completed at the same time?*

Absolutely! You can do this on the **Calendar** tab of the client file.

#### To mark multiple tasks as completed

1. From the PracticeMaster **File** menu, point to **Open** and select **Client**.
2. Select the client whose records you want to mark as completed.
3. On the **Calendar** tab, click the **Type** column header so that records are sorted based on whether they are marked as an Event or a Task. (**Note:** You may need to select a different column layout in the Quick Clicks pane if the **Type** column is not displayed.)
4. Click to highlight the first T (Task) in the list.
5. Press and hold the **Shift** key and click on the last Task record. (**Note:** This will highlight all Tasks in the list.)
6. Right-click one of the highlighted entries, point to **Action** and select **Mark as Completed**.

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## In Closing:

### E-mail Us Your Questions!

We hope that this newsletter has been informative and helpful. If you have any topics you would like to see covered or if you have any questions you would like answered in a future issue, please send an e-mail to:

[newsletter@tabs3.com](mailto:newsletter@tabs3.com)

Your comments, questions and suggestions regarding the Newsletter are always welcome. *(Note: We cannot personally respond to support questions.)*

### PracticeMaster Q&A...Continued

#### History Tracking Message

***When starting PracticeMaster, a message about the History Tracking File size becoming too large appears. How do we stop this message from being displayed?***

History Tracking records the additions or changes made to specified fields by documenting the User ID and System Date when each function is performed. This message is being displayed because the size of the file storing this information is close to the configured file size limit.

You have two options regarding this message: You can leave the file the size that it currently is and choose to not show the message again when clicking **OK**, which will result in the oldest tracking information being removed as new information is added; or, you can increase the size of the file to reduce or eliminate this message from occurring.

To change the file size, increase the value of the **History File Size** field in PracticeMaster Customization (*Utilities | Customization*).

#### Recurring Dates

***How can I make recurring calendar entries in PracticeMaster so that every month, on the first Monday, a calendar record is created for a meeting with a client?***

You can use the Recurring Dates feature in PracticeMaster to schedule your monthly meetings.

#### To create a recurring entry

1. From the PracticeMaster **File** menu, point to **Open** and select **Calendar**.
2. Press **Ctrl+N** to open a new calendar record.
3. Click the **Recurring Date** button, and then click the **Formula** button.
4. In the Frequency section, select the **Monthly** option.
5. In the Activity Repeats section, select the second option and change the sentence to read "The **first Monday** of every **1** month(s)."
6. In the Range section, select the date range in which you want the records to repeat.
7. Click **OK**, and then click **OK** again.

When you save the calendar entry, meetings will be scheduled for all of the dates you selected.

### Announcement:

#### New Invoicing System

You may have noticed that your current maintenance invoice looks a little different. This is because we recently implemented a new invoicing system. If you have any questions, please contact our Sales department at (402) 419-2200.