Tabs3 Billing Quick Start Checklist

1. Set Up Tabs3 Billing

Open any Tabs3 Software application and complete the Guided Setup.
Tip: In the Quick Launch, search for and select "Customization" to specify additional options.

2. Add Timekeepers & Rates

In the Quick Launch, search for and select "Timekeeper Information."
From here, you can add timekeepers and define separate billing rates for each.

3. Add Clients

In the Quick Launch, search for and select "Client Information."
Add clients and contacts to Tabs3 Billing.

Tip: Set default settings for new clients by searching for and selecting "Customization" in the Quick Launch and select the **Client Defaults** tab.

4. Add Fees & Costs

In the Quick Launch, search for and select "Fee Entry" or "Cost Entry."
You can enter billable time for timekeepers, advanced client costs, and expenses incurred.

Tip: Use the **Toggle List** button to view a list of transactions.

5. Run Statements

In the Quick Launch, search for and select "Generate Statements."
Generate draft and final statements for Tabs3 Billing clients.

Tip: Use Pre-Bill Tracking to track the status of your draft statements and launch your final statements.

6. Update Statements

In the Quick Launch, search for and select "Update Statements."
Update final statements once they have been approved and sent to clients.

Tip: Make a backup before updating statements.

7. Print Accounts Receivable Report

In the Quick Launch, search for and select "Summary A/R Report."
Run reports after updating statements.

8. Add Payments

In the Quick Launch, search for and select "Payment Entry."
Add payments upon receipt.

9. Matter Manager

In the Quick Launch, search for and select "Matter Manager" or click on a Recent or Pinned Matter.
See detailed matter information and balances; launch commonly used features and reports.

Tip: Use the **PracticeMaster** button to launch the PracticeMaster Matter Manager.

10. Resources & Advanced Features

www.Tabs3.com/quickstart
See easy step-by-step procedures for these tasks and learn where to find more information in the Tabs3 Billing Quick Start Guide.

Tip: In the Quick Launch, search for and select "Training Videos" to view a list of all available videos.

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Tabs3
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See the companion Tabs3 Billing Quick Start Guide for detailed information at:
www.Tabs3.com/quickstart