

## Platinum Edition of Tabs3 Software

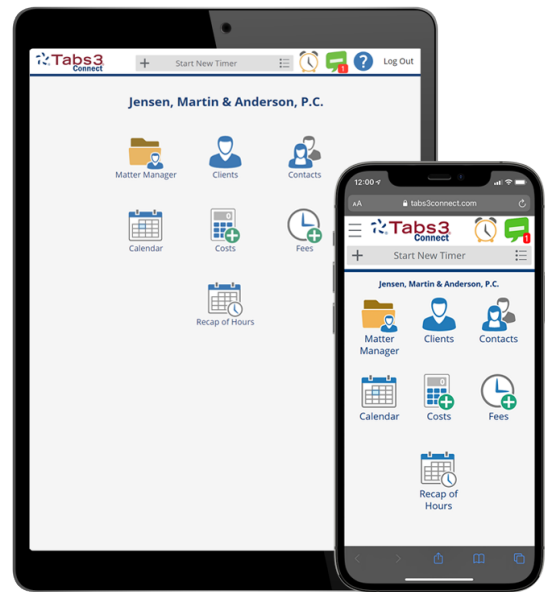
### Even More Speed, Reliability, and Convenience

The Platinum Edition of Tabs3 Software offers a variety of enhancements that will help to increase the speed, convenience, and reliability of Tabs3 Billing and PracticeMaster. The Platinum Edition provides Tabs3 Connect, Accelerators, HotBackup, Auto-Recovery, Log Off Users, Exchange Connector, eNote, and advanced reports, none of which are available in the non-Platinum Edition. Let's take a closer look at how these enhancements work.



### Tabs3 Connect

Tabs3 Connect provides access to Tabs3 Billing and PracticeMaster anywhere you can connect to the Internet. No apps to download, simply go to [Tabs3Connect.com](http://Tabs3Connect.com) from any device with a web browser. While logged in to Tabs3 Connect, you can add fees and costs, access the firm's client and contact lists, use the firm-wide calendar, and find case information in Matter Manager. You can also send and receive eNotes from others who are logged in to Tabs3 Connect or logged in at the office. On smartphones and tablets, you can tap to create a fee, and flick to scroll through a list. Tabs3 Connect was designed to protect attorneys' sensitive information. The information you access using Tabs3 Connect is secure because it resides at your office, on your server. It won't be saved on our server, or on someone else's server in another country where it may not be protected by U.S. laws. In fact, similar to a financial institution, we SSL encrypt all of the communication between your mobile device and your office. Tabs3 Connect is free for firms with Tabs3 Billing and PracticeMaster Platinum (or PracticeMaster Platinum alone) who are on maintenance.



### Accelerators

To increase the speed of common reports, Platinum uses Accelerators. Accelerators process reports on the server, rather than on your workstation. The result is that common reports run 10 to 30 times faster when compared to the non-Platinum Edition. For example, firms with large amounts of data can run a report that would currently take 30 seconds in as little as 1 second.

The increased speed is primarily due to changing where the report is processed. In the non-Platinum Edition, your workstation asks the server for report data. The server responds by sending all of the necessary data across the network. Your workstation begins to process the report, but if additional information is needed, new requests have to be sent and fulfilled over the network. In the Platinum Edition, your workstation and network play a minimal part

in report processing. This is because the report request is sent to the server, and then, rather than sending large amounts of data back to your workstation, the Accelerator on the server generates the report. The finished report is then returned to your workstation to be printed. By both reducing the data that needs to travel over the network and using a server that is typically faster than your workstation, you can experience much faster report processing, and less network traffic. In addition to faster report processing, accelerators work the same way to also provide significant improvements to filtering and sorting.



### HotBackup

Although speed is an important Platinum enhancement, eliminating the inconvenience of midday backups is also a significant benefit to many firms. Often, firms dismiss prompts to make a backup before proceeding because of the hassle involved with getting all users to log out during the day. They may choose to rely only on a nightly backup. However, if they need to restore their backup, this can result in a loss of an entire day's productivity. To make it easier to make the backups you want and need, Platinum offers HotBackup, which allows users to make a backup while others continue to work.

Here is a common scenario for firms that have the non-Platinum Edition: A bookkeeper needs to use Change WIP Transactions. When she begins, Tabs3 Billing prompts her to run a backup. To back up, everyone must exit the software. She knows that they have a lot of data and the backup will take more than a few minutes, and that getting everyone out of the software will be a major ordeal. So, she decides to skip the backup and take the risk that nothing will go wrong with her workstation or network while she runs Change WIP Transactions. Platinum eliminates the risk and anxiety for the bookkeeper. It takes a snapshot of the data file when the backup is initialized. The backup is then processed on the server while everyone continues to work in the software. The backup is safe, fast, and convenient.

You can customize HotBackup in different ways, including the number of previous backups to maintain, the location of the backups (allowing you to incorporate your Tabs3 Software backups into your firm-wide backup process), a backup scheduler that lets you choose the times and days to run the HotBackup, and optional email notifications to let you know whether or not each HotBackup completes successfully. Besides convenience, HotBackup also allows you to save an unlimited amount of data to your backup files, rather than the 2GB limitation in the non-Platinum Edition. Please remember, the HotBackup should not replace a robust firm-wide backup procedure.



### Auto-Recovery

Platinum also offers a stabilizing enhancement called Transaction Processing, which provides greater protection from data file corruption when performing most non-exclusive tasks. Many tasks in Tabs3 Software require changing several internal files. Transaction Processing requires that all file changes complete successfully before any part of the transaction is committed to the main database. If even one operation fails, the entire transaction fails, and the main database remains unchanged. This is called Auto-Recovery. In most cases, one would simply need to perform the task again for it to process successfully. Similarly, Auto-Recovery is used whenever the Platinum Server software is shut down unexpectedly. If the firm experiences a power outage or surge, or a hardware malfunction, Auto-Recovery will keep any incomplete database transactions from being committed, leaving the firm's main data set untouched.

Several processes within the non-Platinum Edition of Tabs3 Software (e.g., the Update Statements utility) prompt users to make a backup before proceeding. Platinum eliminates the need to back up for many of these functions. At the server level, Transaction Processing takes a snapshot of the data before each transaction, function, or process initiated. If the process is interrupted at any point before completion, the software will use the snapshot to roll back the transaction so that no error occurs. With this improvement, if a function such as Update Statements is interrupted due to a lost network connection, there will be no need to restore from a backup. Simply run a Data File Integrity Check to ensure no other problems exist, and then run Update Statements again once your network connection stabilizes.



### Log Off Users

There will still be times when all users must exit the Tabs3 Software, such as when updates are installed. And there will also be times when some users are away from their desks with the Tabs3 Software still running. In the non-Platinum Edition of the software, resetting the user simply removes the user from the Active User List; it does not close the software. Therefore, errors can occur. The Reset feature is provided in the event a user's workstation is shut down unexpectedly. If any Tabs3 Software files are open, resetting users can result in fatal errors. Using Log Off Users in the Platinum Edition, you can log these users out of the software safely without risking fatal errors.

Let's say your IT professional has to perform maintenance work on the server, which requires all users to be logged out of the Tabs3 Software. Everyone is logged out except for one attorney who is out of the office for the afternoon. The attorney left Tabs3 Billing open on his workstation, and his office door is locked. Rather than resetting the user, the attorney can be logged out automatically using Log Off Users, eliminating the risk of fatal errors and file lock-ups. For users who are sitting in front of their workstations, Log Off Users displays a message with a countdown, giving them the opportunity to save what they are working on.



### eNote

As a communication tool, eNote provides fast and easy notification within the software. eNote combines the best features of email and instant messaging to let you contact someone with an important message, facilitate workflow between users, retain records for accountability, and enhance your current case management procedures. It is also remarkably easy to use. When an attorney's next appointment arrives while he or she is on the phone, send them an eNote!

eNote also offers an easy way to notify a user of changes or additions to PracticeMaster records such as calendar appointments. The eNotify feature allows you to link any PracticeMaster record to an eNote. For example, a receptionist enters a new client, who has also requested a short introductory meeting with the attorney. While still viewing the client record, the receptionist can click eNotify, type a brief message, and then click "send." The sent eNote will automatically include a link to the client record. When the attorney receives the receptionist's eNote alerting her that a new client is requesting a quick meeting, she can click the link to instantly display the client's record and see all of the client's information. By using eNote, the receptionist has ensured that the attorney has the basic information about the client available at a moment's notice, without using a noisy intercom, placing a

telephone call, or sending an email to an already overflowing inbox. eNote provides a fast, easy, and convenient form of communication for your firm.



## Reports

The power of the Platinum Server software and server side processing makes the following data intensive Tabs3 Billing reports available:

**Accounts Receivable by Timekeeper Report:** This report lists all clients with receivables by any working timekeeper, or range of working timekeepers, regardless of the primary, secondary, or originating timekeeper. This report allows a timekeeper to filter clients by including only those clients that the timekeeper worked on. Reporting by working timekeeper helps the billing department see which attorneys may need collections assistance, and makes it easier to determine how much each working timekeeper is currently owed.

**Detail Accounts Receivable Report:** As a Platinum user, you have the option to include detail information for fees and costs, allowing you to view aged receivables for each working timekeeper and cost type.

With Platinum, the Detail and Summary Accounts Receivable Reports include a Print Historic A/R option, which will print accounts receivable balances for a selected date. This option calculates the A/R based on records present in Tabs3 Billing, assuming no records have been deleted or modified.



## Exchange Connector

Another Platinum feature, Exchange Connector, improves Outlook synchronization for the attorneys who spend time away from the office. PracticeMaster synchronizes contacts and calendars with Outlook, and Outlook synchronizes with most smartphones. Platinum's Exchange Connector synchronizes PracticeMaster calendars and contacts with Outlook via Microsoft Exchange. Because Microsoft Exchange is always on, appointments and contacts on your smartphone are synchronized with PracticeMaster even when your workstation is turned off.

This means that if only one computer (e.g., your server) is on with PracticeMaster running, the calendar and contacts added to PracticeMaster will synchronize with your smartphone no matter where you are. The opposite is also true. If, while you are away from the office, you add an appointment to the calendar on your smartphone, Exchange Connector will add it to your PracticeMaster calendar so that everyone at the office can see it.

## Summary

The use of Tabs3 Connect, Accelerators, HotBackup, Auto-Recovery, Log Off Users, Exchange Connector, eNote, and advanced reporting make Tabs3 Platinum not only faster, but more convenient and reliable.

For more information regarding the Platinum Edition, please visit [tabs3.com/platinum](http://tabs3.com/platinum), contact your local consultant, or contact us at (402) 419-2200 or [platinum@tabs3.com](mailto:platinum@tabs3.com).