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PRACTICE MANAGEMENT

BUYERS GUIDE: 2021 EDITION



FILE STORAGE
SOLUTIONS



OFFICE MANAGEMENT
SOLUTIONS



SECURE CLOUD
TRANSFER



CLIENT CONTACT
ORGANIZATION

Extensive Billing, Financial, and Matter Management Tools for Small and Midsize Firms Offering Cloud-Based or On-Premise Access Options with Powerful Document, Calendar, and Client Payment Integrations

“PracticeMaster has a wide range of functionality. Creating and sharing documents, sending notifications to coworkers, and tracking billable hours are all possible without any add-ons that muddy the experience.”

Ben Hammar,
Law Clerk at Atwood, Holsten,
Brown, Deaver & Spier Law Firm

Company Name Brand
Software Technology, LLC dba Tabs3

Product Name Brands
Tabs3 Billing, Tabs3 Financials,
PracticeMaster, Tabs3 Connect (mobile),
Tabs3 Hosted by ProCircus, and CosmoLex
by Tabs3

Latest Developments and Updates (Version 2021)
Tabs3 continually releases **new features and functionality** throughout the year with annual releases identified by the year.

- Integrations with **LawPay** and NetDocuments can save you time and help you get paid faster.
- Billing **Matter Manager** creates a single unified hub to manage financial data for matters including work in process, accounts receivable, and trust balances.
- **Dashboards** help you monitor billings and accounts receivable to manage a law business.

- **Statement Manager** manages the content and distribution of client invoices, batches actions, and supports Quick View filters for custom views.

Lawyers always have a lot to juggle between client requests, drafting documents, and doing research but none of that matters if you can't stay on top of your firm's financial health. You didn't go to law school to run a business but, if you can't, your work life includes a lot of stress and drama that you could live without. That's why you need a trusted software product designed to manage your practice.

Software Technology, LLC offers **Tabs3 Billing, Tabs3 Financials,** and **PracticeMaster** and they comprise a comprehensive and intuitive Microsoft Windows-based software suite for law firms. The company sells the software components separately or bundles one or more of them together. When you use

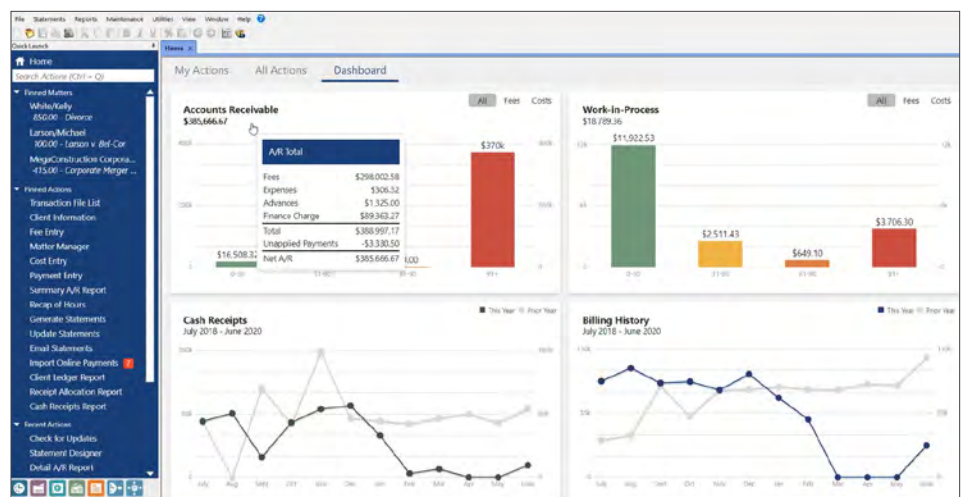


Figure 1: The Tabs3 dashboard reports high-level data on accounts receivable, work in process, and annual billing. Mouse over the totals to get a breakdown for particular periods and drill down into any area in a single click.

“ Tabs3 Billing and PracticeMaster help us work more efficiently and when we are more efficient, we can be more profitable.”

Steve Quinn, Stretz/Quinn

them all, you can set up a new matter in PracticeMaster and all the data automatically populates into the Tabs3 Billing and Financials software which all feature similar dashboards.

Keeping Tabs on Your Financial Dashboard

The Tabs3 Billing dashboard can immediately show you accounts receivable, work in process, year-over-year reports on cash receipts, billing history, and more.

The navigation panel on the left side keeps all your options accessible while the main window changes context to reflect the selected matter or action. You can access standard tools to start timers at the bottom of the navigation panel allowing you to create time entries, access files, and generate documents. Drop-down menus appear across the top of the interface but, if you don't see an action, you can type it into the search window to bring it up. See *Figure 1 on the previous page.*

Time Tracking, Billing, and Accounting Made Easy

Tabs3 Billing tracks time entries to accounts receivable and supports extensive reporting capabilities with more than 100 standard reports. As payments come in, compare them to receipts applied to various expenses and perform write-ups, write-downs, and write-offs as necessary. You can automate functions, such as paying off advances, and dedicate payments to originating partners before costs. The system supports multiple billing formats (including LEDES) and can customize them according to client requirements.

You can navigate to a specific matter from the panel on the left and a new tab opens in the Matter Manager. You can view case information in four sections: 1) matter information on top; 2) billing summary tiles in the center; 3) quick clicks on the right; and 4) list contents below. The summary tiles show accounts receivable, work in process, and the trust balance for the case. See *Figure 2.*

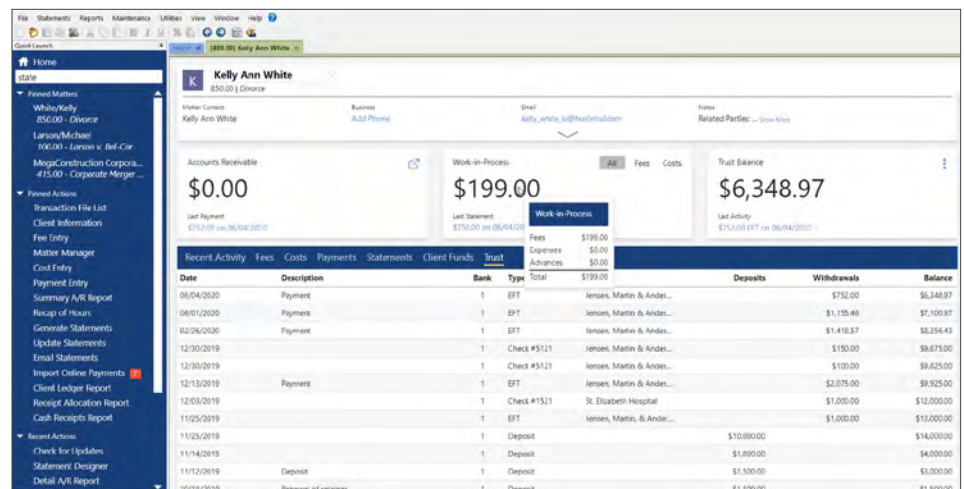


Figure 2: In the Tabs3 Matter Manager, select list views to focus on recent activity, fees, costs, payments, statements, client funds, write-offs, and trust accounts. You can quickly drill down to the last statement sent and payment and the most recent trust account activity.

“The Tabs3 general dashboard can immediately show you accounts receivable, work in process, year-over-year reports on cash receipts, billing history, and more.”

Tab3 Financials supports bank accounts and legal trust accounting with import capabilities, three-way reconciliation, and check writing. You can set up automatic trust payments to pay the balance due on invoices and record them on the invoice. You can also easily identify a trust account that drops below the agreed-upon threshold. See *Figure 3*.

Mastering the Management of Your Practice

PracticeMaster is a matter, content, document, and contact management software program with Microsoft Word document automation capabilities. Most legal practice management software platforms are built around a calendar. PracticeMaster is designed to track information and research around the issues and documents a firm handles.

PracticeMaster comes with customizable record types and templates for a dozen or more law areas such as bankruptcy, criminal law, real estate, and worker's compensation so the platform can fit your specific practice. See *Figure 4 on the next page*.

PracticeMaster includes built-in document management with versioning but you can **alternatively** access and manage NetDocuments or Worldox file repositories. The Journal function displays a timeline of activity including notes, email, phone logs, research, and billing. You can filter the list by the record type.

You can integrate your Microsoft Outlook email with PracticeMaster and bill the time you spend on emails and appointments. When you “journal” an email from Outlook to PracticeMaster, the system records it in the **Journal** for the matter matched by the sender or recipient's email address. A journaled email retains the original link to the message in Outlook. Once in the Journal, PracticeMaster uses messages and attachments and other data in conflict searches. PracticeMaster also includes an internal messaging feature into its software. You can use the internal messaging feature to communicate with other users in the system using eNote and you can include links to documents and Journal entries.

Account	Balance	Last Import	Last Reconciliation
1 - First Bank ICLIA Account	\$1,481.43	06/30/2020	06/30/2020 3 May Rec Reconcile
2 - First Bank Interest Bearing	\$8,183.92		No reconciliation history Reconcile
3 - Medical Care Account	\$4,773.53		No reconciliation history Reconcile

Date	Trust ID	Bank	Type	Payee	Deposits	Withdrawals
08/24/2020	85000 - Kelly Ann White - Divorce Payment	1	DEP		\$425.00	
08/24/2020	10100 - John Williams - State v. Williams Payment	1	DEP			\$1,903.40
08/21/2020	85000 - Kelly Ann White - Divorce Payment of October Surpass	1	Check #45340			\$125.00
08/14/2020	Combined Transaction Client \$50.00 & \$50.00 (White, deposit)	1	Deposit		\$1,000.00	
08/13/2020	10100 - John Williams - State v. Williams Retainer Payment Received, Thank You	1	Deposit		\$1,633.58	
08/11/2020	100 - Administrative Account - For tracking all Firm and Interest adjustments Payment for Auditing Fees	1	Check #45339	Lancaster County Treasurer		\$125.00
08/11/2020	10100 - John Williams - State v. Williams Blood Testing - Direct Payment	1	Check #45338	BryantLGH East Medical Center		\$257.23
07/28/2020	85000 - Kelly Ann White - Medical Care of Blaine Purchase medical supplies and new clothing for Scappie	3	Check #2001	St. John's Hospital		\$1,250.00
07/28/2020	85000 - Kelly Ann White - Medical Care of Blaine Monthly deposit from Kelly White for Scappie	3	Deposit		\$500.00	

Figure 3: The Trust Accounts Dashboard provides quick access to your bank accounts as well as a list of your recent trust transactions.

“ PracticeMaster comes with customizable record types and templates for a dozen or more law areas such as bankruptcy, criminal law, real estate, and worker’s compensation so the platform can fit your specific practice.”

A wizard creates workflows that can, among other things, create or change records, process calendar entries, generate calendar rules for a new case, create custom notes that pop up at the right time, start document assembly, or create an email. You can automate actions on any recurring activity or configure a manual action. Workflows appear for actions in the Quick Links panel.

Software Technology’s reporting capabilities extend to the general ledger and the PracticeMaster management platform. You can build reports using a wizard with almost any criteria in the database (Microsoft SQL or NoSQL) and save them in PDF, HTML, Excel, or CSV format. All matter data is an open book to the report writer and you can generate an accounts receivable report in more than 40 different ways down to an invoice and the creation of aging reports. The software supports ODBC drivers for law firms that use SAP Crystal Reports or other software to create and distribute information.

Security in Tabs3 applies to users and roles. You can finely tune secure access to applications, matters, documents, reports, and even down to a database field. Since Tabs3 is on-premises software, there is no multifactor authentication (MFA) support but MFA is supported in [Tabs3 Connect](#) to remotely access key Tabs3 features online or the software-as-a-service (SaaS) [CosmoLex, by Tabs3](#).

Mobility and the Cloud
[Tabs3 Connect](#) provides secure, remote access to Tabs3 features and your data for mobile phones and tablets, laptops, and desktop computers from any internet-based location. Tabs3 Connect uses the same security profiles you set up in the Tabs3 platform but stores no data on devices in case they become lost or stolen. You can perform essential tasks like checking client information, reviewing your calendar, entering billable time, and writing internal messages over a secure socket layer in a web browser. A voice-enabled option lets you create time entries and task

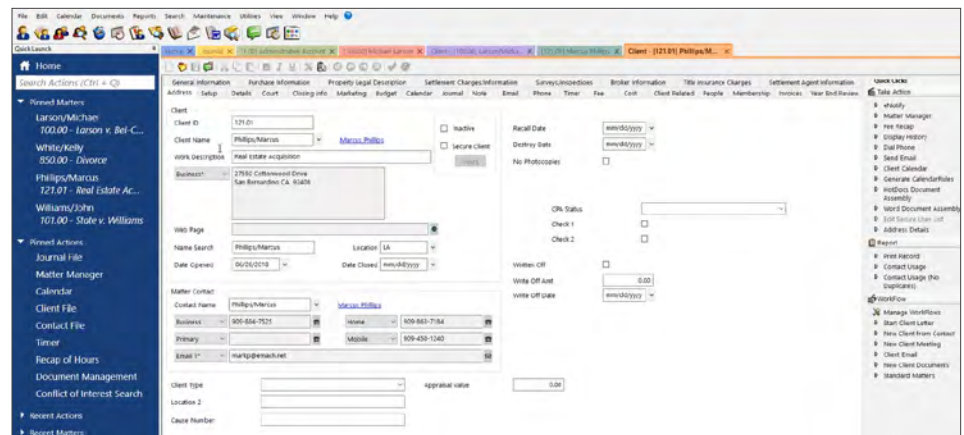


Figure 4: The Matter view in PracticeMaster condenses data and makes it actionable in the main window. Tabbed views across the top change the main window’s context, quick actions on the right start a task, and navigation sticks to the left panel. Here, a real estate practice includes record types for property, purchase, closing, and settlement.

“**Tabs3 Connect provides secure, remote access to Tabs3 software and your data for mobile phones and tablets, laptops, and desktop computers from any internet-based location.**”

codes by talking on the phone. Mac users must use Connect because there is no native software client for MacOS.

If you want a cloud-based solution, **Tabs3 Hosted by ProCirrur** runs in a hosted environment that can handle your entire IT infrastructure. You can also get software-as-a-service comparable to PracticeMaster and Tabs3 from **CosmoLex**, by Tabs3.

Pricing, Firm Size, and Powerful Integrations

Tabs3 Billing and Financials and PracticeMaster are available on a subscription per user per month basis or the firm can acquire a standard license for the on-premises client-server software. The **Platinum Version of Tabs3** software enhances the user experience with Tabs3 Connect, software accelerators, backup and auto-recovery, and eNotes. A national network of certified consultants provides sales, installation, technical support, and training for Tabs3 software. You can convert on-premise software to the cloud or revert from the cloud to on-premise.

Tabs3 has more than 40 years of experience integrating its software suite with standard law office applications in small to midsize firms. Tabs3 Billing and Financials integrate with LawPay and ProPay. With the LawPay integration, firms can send email statements with a customized LawPay link to a secure online portal and also import client payments and trust deposits. PracticeMaster integrates with AbacusNext's HotDocs, Adobe PDF, NetDocuments, ScanSnap, and Worldox. PracticeMaster customers can also use **CalendarRules** with their calendars and CosmoLex integrates with LawPay and NetDocuments.

Who is Tabs3?

Since 1979, Lincoln, Nebraska-based Software Technology has made and

distributed Tabs3 software which provides law firms with billing, financial, and practice management software. In 2018, the Tabs3 maker **acquired** CosmoLex, a legal practice management software-as-a-service with billing and law office accounting. Software Technology has more than 100 employees supporting more than 100,000 legal professionals using Tabs3 and CosmoLex. The company boasts the largest market share in the 5 to 30 attorney law firm segment and retains one of its original clients from 1979, **Keating O'Gara Law** in Lincoln, Nebraska.

Why Should You Consider Tabs3?

- Flexible deployment options for cloud and on-premises that can connect from anywhere and include a SaaS option with CosmoLex.
- Uniform interface for matter and financial management, time and billing, and trust accounting—no QuickBooks necessary.
- Integration with LawPay and ProPay for online payment processing (Tabs3 Billing and Financials).
- Standard law office applications including Adobe, CalendarRules, Microsoft Outlook and Word, NetDocuments, ScanSnap, and Worldox all work directly with PracticeMaster.

Try Tabs3 Today!

Get a free trial of Tabs3 Billing, Tabs3 Financials, and Practice Master [here](#) or schedule a walkthrough demo [here](#). ■

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