Quick Start Guide

Getting you up to speed quickly.

www.PracticeMaster.com

PracticeMaster Quick Start Guide

Version 16 (January 2012)

PracticeMaster Quick Start Guide

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

Tip: If you are getting started with both PracticeMaster and Tabs3 , we recommend starting with Tabs3 first.

More Info – Installation & Startup

Printed instructions come with the CD. If you do not have these instructions, a copy is on the CD in the DOCS folder.

R11027 – Installing Your FREE License of PracticeMaster Basic
www.support.PracticeMaster.com/main/R11027.htm

Installation

If you have not yet installed PracticeMaster, it's easy to do. Simply follow the instructions provided with the CD. If you have Tabs3, you have a free one-user license of PracticeMaster Basic.

Once installed, you are ready to get started.

Starting PracticeMaster

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

Tip: The first time you start PracticeMaster, the Customization window will be displayed. The **Key Type** and **Decimal Places** must match Tabs3 and are configured to do so automatically. You can read about these fields in Help as well as Chapter 2 of the PracticeMaster manual. Click **OK** to save the Customization settings.

Getting Data into PracticeMaster

Let's start with getting your data into PracticeMaster.

Step 1 – Tabs3 Clients 

First, let's get your Tabs3 clients into PracticeMaster. Assuming you've been using Tabs3 and you've just installed PracticeMaster, all you need to do is synchronize the two. When synchronizing, the following data will automatically be brought over from Tabs3 into PracticeMaster: clients, contacts, work-in-process fees and costs, client notes, and billing files (i.e., timekeepers, transaction codes, categories, task codes, locations, and text macros). As an option, you can also bring over archived fees and costs. The following procedure needs to be done only once by one user. We recommend that your PracticeMaster administrator run the initial synchronization of PracticeMaster and Tabs3 as follows.

Synchronizing Tabs3 with PracticeMaster

1. Start Tabs3.
2. From the **Utilities** menu, run a **Data File Integrity Check**. You may have an error 500, which is expected. This error indicates that PracticeMaster and Tabs3 are not synchronized. Proceed only if the check has no errors, or only has an error 500.
3. From the Tabs3 menu bar, select ***Maintenance* | *Integration* | *Synchronize Tabs3 and PracticeMaster***.
   Tip: Synchronizing billed fees and costs is optional. If you've been using Tabs3 for several years, you may want to clear the **Convert Tabs3 archive records to PracticeMaster fee and cost records** check box. Although synchronizing all billed fees and costs allows them to be included in conflict checking, it also affects the time it takes to run certain utilities such as Data File Integrity Check.
4. From the **Utilities** menu, run a **Data File Integrity Check** again to verify the error 500 is no longer present.

Now that Tabs3 and PracticeMaster are synchronized, whenever you add or edit a client, contact, fee, or cost in Tabs3 or PracticeMaster, the changes will automatically mirror to the appropriate files in the other system.

Adding Clients

Clients are added to PracticeMaster via 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.

- From the **Main** Task Folder, click the Client button.

Tip: When entering information for a potential client, enter the information in a Contact record. Later, when the contact becomes a client, in the Contact window, use the **Create Client** option in Quick Clicks to create a new client record.

Tip: If you are not using Tabs3, other options may be available for importing client information from other software. Contact your PracticeMaster reseller or consultant, or Technical Support, to discuss other options.

More Info – Clients

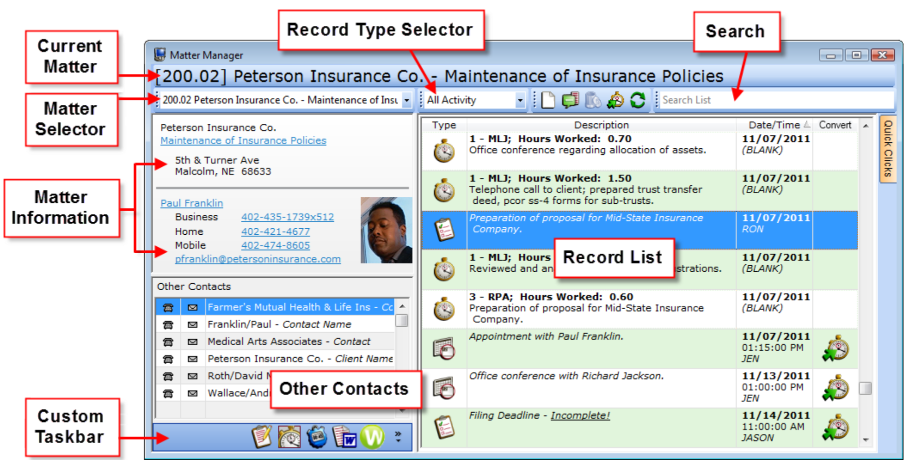
Training Videos – Entire Clients & Contacts Video Library (9 videos)
Client Overview

Help Topics
Press F1 on any tab in the Client window,
Click the Index tab and type Clients

KB Article R11130 – PracticeMaster Quick Guides – Contacts
www.support.PracticeMaster.com/main/R11130.htm

Step 2 – Matter Manager

The Matter Manager is a feature that attorneys and paralegals will use often. The Matter Manager shows detailed information for a client's matters and lets you customize and launch the most commonly used programs. You can see all contacts and activity, convert transactions to fees, view Tabs3 billing information, and more.



To open the Matter Manager, do one of the following:

- From the **Main** Task Folder, click the **Matter Manager** button.
- From the **File** menu, point to **Matter Manager**.
- Press *Ctrl+M*.

More Info – Matter Manager

Training Video – Using the Matter Manager

Help Topics – Press F1 in the Matter Manager window

KB Article R11403 – All About Matter Manager
www.support.PracticeMaster.com/main/R11403.htm

Keep in mind that as more data is added for each matter, more information will be available via the Matter Manager.

Integrating Outlook Calendar and Contacts

Steps 3 and 4 of this document walk you through synchronizing calendar entries and contacts between Outlook and PracticeMaster. Before proceeding, however, it is important to plan how you want to implement the integration. For example, if you have three attorneys who all want to synchronize their smartphones with PracticeMaster via Outlook, you will need to carefully consider how to implement this. Otherwise, you could end up having three or four different records for each contact in PracticeMaster, making it extremely difficult to clean up. It is much easier to implement synchronization for one attorney at a time, and clean up contact information *before* synchronizing the next attorney's information.

We strongly recommend reviewing the **Outlook Integration Guide** before synchronizing the first time. Specifically, the *Getting Started* and *Best Practices* sections of the **Outlook Integration Guide** include numerous guidelines to consider when planning the implementation of Outlook synchronization. Because each firm's situation and requirements are different, it is important to plan for this implementation. For example, some of the questions you will want to ask include:

- Do you want *calendar entries* to synchronize only from PracticeMaster to Outlook (i.e., one-way integration)? Or do you want *calendar information* to synchronize from PracticeMaster to Outlook ***and*** from Outlook to PracticeMaster (i.e., two-way integration)?
- Do you want *contacts* to synchronize only from PracticeMaster to Outlook (i.e., one-way integration)? Or, do you want *contacts* to synchronize from PracticeMaster to Outlook and from Outlook to PracticeMaster (i.e., two-way integration)? Do you only want certain contacts to synchronize? If so, you can set up advanced filters for each user to designate which contacts to synchronize.
- Do you want integration to be automatic or manual? Most firms prefer automatic.
- Do you want personal *calendar entries* from Outlook in PracticeMaster? If not, enter your personal calendar entries in a separate Outlook folder than the folder specified for integration.
- Do you want personal *contacts* from Outlook in PracticeMaster? All contacts can be seen by all PracticeMaster users. If not, select the **Private** check box in the Outlook record and clear the **Include private Outlook contacts** check box on the **Contacts** tab of the Outlook Synchronization window.

More Info – Outlook Integration

Help Topics – Press F1 in the Outlook Synchronization window

R11400 – Outlook Integration Guide
www.support.PracticeMaster.com/main/R11400.htm

R11366 – Configuring PracticeMaster/Microsoft Outlook Calendar & Contact Integration
www.support.PracticeMaster.com/main/R11366.htm

R11402 – PracticeMaster & Microsoft Outlook Calendar & Contact Integration FAQ
www.support.PracticeMaster.com/main/R11402.htm

Additionally, it is important to review the differences in how information is treated. The **Outlook Integration Guide** includes information regarding these differences.

Important Tips: Before you perform your first synchronization, keep in mind that calendar events that span multiple days ***must*** be entered in PracticeMaster as multiple single-day events. Additionally, recurring events entered in Outlook do not synchronize to PracticeMaster; therefore, recurring entries ***must*** be entered in PracticeMaster using the Recurring Date feature.

After reviewing the **Outlook Integration Guide**, we recommend contacting your PracticeMaster reseller or consultant, or our Technical Support staff, with any questions you have before proceeding.

Step 3 – Outlook Calendar Entries

Now, let's get your calendar entries from Outlook into PracticeMaster. PracticeMaster classifies calendar entries as events and tasks, just like Outlook.

Let's configure the calendar integration.

Configuring & Synchronizing Outlook Calendar Integration

1. Start PracticeMaster.
2. From the **Maintenance** menu, point to **Integration** and select **Outlook Synchronization**.
3. Click the **Calendar** tab.
    a. Select **PracticeMaster to Outlook** to add PracticeMaster calendar entries to Outlook, and select either **Automatic** or **Manual**.
    b. Select **Outlook to PracticeMaster** if you want calendar entries from Outlook added to PracticeMaster, and select either **Automatic** or **Manual**.
    Tip: Decide if you want calendar entries deleted in Outlook also deleted in PracticeMaster. Some firms do not allow this because it is too easy for someone to accidentally delete a critical calendar entry in Outlook and then have it also deleted in PracticeMaster. Leave the **Allow deletions in PracticeMaster** check box cleared if you do not want Outlook deletions made in PracticeMaster.
    c. Under **Record Type**, select whether you want to synchronize events, tasks, or both. Then click the corresponding **Select Folder** button to specify the calendar folder with which you want to synchronize.
    Tip: PracticeMaster events typically integrate with the Outlook Calendar folder. However, you may want to consider setting up a special folder in Outlook that is used solely for synchronizing PracticeMaster calendar entries. This makes it easy to keep the PracticeMaster calendar entries separate from personal calendar entries.
    d. Select any other desired options.
4. Click the **Synchronization Options** tab.
5. Under Manual Synchronization, click **Sync Now** to perform the initial calendar synchronization.
    a. You will be asked if you want to save the changes.
    b. Click **Yes**.

Tip: After synchronizing calendar entries from Outlook, start PracticeMaster and add the client ID to the client-related calendar entries.

Step 4 – Outlook Contacts

Next, let's get your contacts from Outlook. As with calendar entries, you need to decide how you want your contacts to integrate. Integration of contacts between PracticeMaster and Outlook is extremely flexible, allowing you to use different criteria for each user that integrates with Outlook. PracticeMaster will include any clients and contacts from Tabs3.

Let’s configure and synchronize contacts.

Configuring and Synchronizing Outlook Contact Integration

1. Start PracticeMaster.
2. From the **Maintenance** menu, point to **Integration** and select **Outlook Synchronization**.
3. Click the **Contacts** tab.
    a. Select **PracticeMaster to Outlook** to add PracticeMaster contacts to Outlook, and select either **Automatic** or **Manual**.
    b. Select **Outlook to PracticeMaster** if you want contacts from Outlook added to PracticeMaster, and select either **Automatic** or **Manual**. If you’re not sure at this time, you can turn this feature on later.
    c. Under **Synchronization Options**, click the **Select Folder** button to specify the contact folder with which you want to synchronize.
    Tip: When first starting to synchronize PracticeMaster and Outlook, consider setting up a separate folder in Outlook that is used solely for synchronizing PracticeMaster contacts. This prevents PracticeMaster/Tabs3 contacts from being combined with your Outlook contacts. You may have hundreds or thousands of contacts in Tabs3 and PracticeMaster that you want kept separate from your other Outlook contacts.
    Tip: You can set up advanced filters for each user to designate which contacts to synchronize.
    d. Select any other desired options.
4. Click the **Synchronization Options** tab.
5. Under Manual Synchronization, click **Sync Now** to perform the initial contact synchronization.
    a. You will be asked if you want to save the changes.
    b. Click **Yes**.

Tip: Review your contacts. Open the Contact file in PracticeMaster by clicking the **Contact** button on the **Main** Task folder.

Tip: If synchronization requires user intervention, an “Outlook Synchronization Suspended” message will be displayed in red in the task bar at the bottom of the PracticeMaster window. Click the message to resolve the issue. Read more about suspension in the **Outlook Integration Guide**.

Wrapping Up Outlook Integration

In the previous steps, we started the initial synchronizations by clicking the **Sync Now** button. However, PracticeMaster can be configured to perform a periodic synchronization that occurs when you start PracticeMaster and at a set interval, thus eliminating the need to manually synchronize data. After performing the initial synchronizations, go back into Outlook Synchronization.

1. From the PracticeMaster **Maintenance** menu, point to **Integration** and select **Outlook Synchronization**.
2. Click the **Synchronization Options** tab.
3. Verify that the **Periodically run synchronization** check box is selected.
4. In the **Require confirmation** check box, change the number of records that require confirmation to a reasonable number for which you would want to confirm the changes before they are committed, such as 20 or 30 for example. Otherwise, leaving this number set to 1 will display

the confirmation window each time a periodic synchronization is started when there are entries that need synchronized, thereby allowing you to review all pending changes before the synchronization occurs.

5. Click **OK**.

Now that the initial setup is done, let's take a look at the various PracticeMaster features that you will want to use right away.

Features

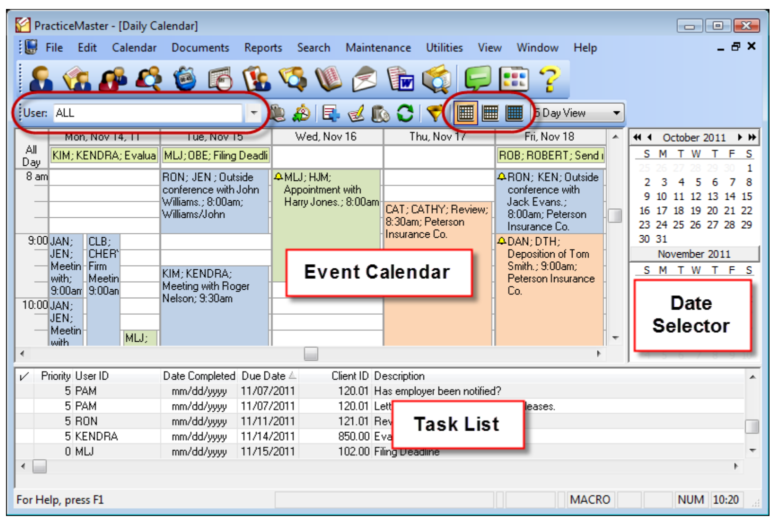
Although PracticeMaster has many features, we will show you just a few to help you get started right away.

Step 5 – Calendar

The PracticeMaster Calendar is probably one of the first features that firms will use. Unlike the calendar in Outlook, you can easily associate calendar entries with clients and contacts. Use the following to take a quick tour of the calendar.

Calendar Quick Tour

1. Select **Calendar** | **Daily Calendar** to open the calendar.
2. In the toolbar at the top, click to view a weekly calendar. Click to view a monthly calendar.
3. In the **User** field at the top of the calendar, click the drop-down arrow to select whose calendar you want to view.
4. Using the Date Selector to the right side of the calendar, click a different day in a different month to easily change which day is shown.



5. From the **Calendar** menu, click **Calendar Properties**. This window is where each user can configure his or her properties. Click on each tab to see the various options.
6. Read the **Calendar Quick Guide**, as listed in the following **More Info** table. It provides an excellent introduction to the PracticeMaster calendar.

Just like Outlook, calendar entries are classified as Events (i.e., appointments) or Tasks.

More Info – Calendar

Calendar Quick Guide

Press F1 in the Calendar window and click the icon
KB Article R11130 – PracticeMaster Quick Guides – www.support.PracticeMaster.com/main/R11130.htm

Training Video – Calendar Overview

Help Topics – Press F1 in the Calendar window and Calendar Properties window

PracticeMaster Manual – Chapter 7: Calendar

Step 6 – Journaling E-mail Messages

You can journal any e-mail message to PracticeMaster while using Outlook. This is done using the Outlook Toolbar Plug-in. Clicking the **PM Journal** button on the toolbar opens a journal record with the e-mail message and any attachments, allowing you to assign the matter. Once journaled, you can easily see all e-mail communications for a specific matter, regardless of who sent or received the e-mail in Outlook.

All users in your firm can easily install the Outlook Toolbar Plug-in.

Installing the Outlook Toolbar Plug-in

1. From the **Integration** Task Folder, click the **Toolbar Plug-ins** button.
2. On the **Outlook** tab, click **Install Outlook Plug-in**.

In addition to journaling e-mail messages while in Outlook, you can also quickly create a calendar entry or fee entry from any e-mail message using the **PM Calendar** and **PM Fee** buttons on the Outlook Toolbar.

The Outlook Toolbar Plug-in makes it easy for PracticeMaster to be your central repository for all client e-mail communications.

More Info – Journal

Outlook E-mail Plug-in Quick Guide – KB Article R11130 – www.support.PracticeMaster.com/main/R11130.htm

Training Video – Outlook E-mail Toolbar

Help Topics – Press F1 in the Toolbar Plug-ins window

Step 7 – Conflict of Interest Search

Conflict of Interest searching in PracticeMaster is lightning fast. Search contacts, appointments, e-mail messages, documents, and meeting notes. In just one click, you can access the details of any conflict.

- To open a Conflict of Interest search window, from the **Search** menu, select **Conflict of Interest Search**.

More Info – Conflict of Interest

Training Video – Conflict of Interest Search

Help Topics – Press F1 in the Conflict of Interest Search window

KB Article R11091 – Comparing Tabs3 & PracticeMaster Conflict of Interest
www.support.PracticeMaster.com/main/R11091.htm

KB Article R10515 – Technical Info on PracticeMaster Conflict of Interest
www.support.PracticeMaster.com/main/R10515.htm

Step 8 – Fees

Fees entered in PracticeMaster automatically integrate to Tabs3. Many attorneys will perform their data entry in PracticeMaster.

To open the Fee window, do one of the following:

- From the **Files** Task Folder, click the **Fee** button.
- From the **File** menu, point to **Open** and select **Fee**.
- Press *Ctrl+Shift+F*.

A list of fees is shown with a snapshot of the highlighted fee.

To view fees for a specific client:

1. From the **Client** Task Folder, click **Client**.
2. Click the **Fee** tab.

More Info – Fees

Help Topics – Press F1 in the Fee window

Fee Entry Quick Guide

Press F1 in the Fee window (the Fee Entry window – not the List) and click the icon
KB Article R11130 – PracticeMaster Quick Guides –
www.support.PracticeMaster.com/main/R11130.htm

PracticeMaster Manual **– Chapter 3: Data Entry**

Tip: When adding a new fee, leave the **Rate** and **Amount** fields blank; these fields will be retrieved from Tabs3 when the fee is saved. The **Hours to Bill** field will default to what was entered for **Hours Worked**.

Step 9 – Convert to Fee

PracticeMaster makes it easy to convert calendar entries, e-mails, timer records, and phone calls to fees. You can do all of this in the Matter Manager as well as other areas. To get started, open the **Convert to Fee Settings** program.

Convert to Fee Settings

Because each user may want different defaults for the Fee window when converting to fees, you can configure your own defaults.

- From the **Maintenance** menu, point to **Preferences** and select **Convert to Fee Settings**.

Each tab in the "Convert to Fee Settings" window lets you designate your own defaults for each type of record that can be converted to a fee entry (i.e., Calendar, E-mail, Note, Phone, Research, and Timer).

More Info – Convert to Fee

Help Topics – Press F1 in the Convert to Fee Settings window

Fee Entry Quick Guide – KB Article R11130 – www.support.PracticeMaster.com/main/R11130.htm

Training Video – Converting Records to Billable Fees

Converting to Fee Using Matter Manager

1. From the **File** menu, point to **Matter Manager**.
2. Select **All Activity** in the toolbar drop-down list.
3. Each billable transaction that has not yet been billed will have a icon in the **Convert** column. Clicking the icon displays a Fee window allowing you to create a fee. Once created, the icon is removed from the column, making it easy to see which items have and have not been converted to fee.

Converting to Fee Using Calendar

1. Open the Calendar ***(Calendar | Weekly Calendar)***.
2. From the calendar, right-click any calendar item and select **Convert to Fee**. A Fee window will be displayed allowing you to create a fee.

Converting Journal Records to Fee

E-mails, phone calls, notes, and research tasks are all stored in the Journal File.

1. From the **File** menu, point to **Open** and select **Journal**.
2. Do one of the following:
    - Double-click or highlight any record in the **List** tab. In the Quick Clicks pane, under **Take Action**, select **Convert to Fee**.
    - Right-click any record in the **List** tab. Point to **Action** and select **Convert to Fee**.

Tip: You can also convert journal records to fees while in the Client file via the **Journal** tab using similar methods.

Tip: You can set up a filter to show only your journal records.

Use the PracticeMaster Timer to Create Timer Records

Use the PracticeMaster **Timer** to create timer records to track your activity throughout the day. The timer is easy to use and allows you to easily switch back and forth between tasks.

1. On the **Main** Task Folder, click the button (or from the **File** menu, select **Timer**).

2. Click the button to add a new Time Task to the Timer window. The timer will be started and a new journal record will be displayed, allowing you to specify the Client ID or Contact if desired, as well as record any notes. You can use *Ctrl+S* to save the record now or later.
3. In the Timer window, click the button to stop the timer; click the button to start the timer. Double-clicking the task itself will open the timer record and allow you to edit the Description and assign a Client ID.

Tip: Right-click in the Timer window and select **Preferences** to change the default settings for the user.

View Your Timer Records

Use the **Visual Timer Display** to view your timer records.

1. From the **File** menu, select **Visual Timer Display**.
2. In the upper-left corner, specify your User ID in the **User** field.

Converting Timer Records to Fees

The **Process Timer Records** program is used to convert timer records to fees, on a weekly basis for example.

- From the **File** menu, select **Process Timer Records**.

More Info – Timer

Help Topics – Press F1 in the Timer window, Visual Timer Display window, Process Timer Records window

Timer Window Quick Guide

Press F1 in the Timer window and click the icon

KB Article R11130 – PracticeMaster Quick Guides – www.support.PracticeMaster.com/main/R11130.htm

PracticeMaster Manual – Chapter 6: Journal File: Timer Window

Training Video – Timer Journal

Advanced Features

This section provides you with information regarding advanced features found in PracticeMaster Premier.

Areas of Practice

If you are using PracticeMaster Premier, you can set up separate Areas of Practice for the various types of law practiced. Each Area of Practice has separate files for tracking unique information. For example, you might have a Family Law area of practice, a Business Law area of practice, and a Criminal Law area of practice.

- The Family Law area of practice might

More Info – Areas of Practice

Help Topics – Look up Area of Practice in the Index

KB Article R11064 – Contents of PracticeMaster Area of Practice Templates

http://www.support.PracticeMaster.com/main/R11064.htm

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Chapter 12: File Maintenance

have separate files for Assets, Debts, Spouse Information, Income, Expenses, Children, etc.

- A Business Law area of practice might have separate files for Board of Directors, Shareholders, Financial Institutions, Signatories, etc.
- A Criminal Law area of practice might have files for Witnesses, Prior Convictions, Bonds, Plea Bargains, etc.

Document Assembly

PracticeMaster Premier provides document assembly capabilities using either the built-in Word Document Assembly feature or HotDocs document assembly software. Once PracticeMaster is implemented, using Document Assembly can greatly improve the efficiency with which your standard legal documents are created. Most firms implement document assembly by coding their most commonly used forms and documents first.

> **More Info – Document Assembly**
>
> **Help Topics – Look up Word Document Assembly in the Index**
>
> **KB Article R11015 – How to Start a New Word Document Template**
> **http://www.support.PracticeMaster.com/main/R11015.htm**
>
> **PracticeMaster Manual – Chapter 9: Documents**

WorkFlows

WorkFlows can have a huge impact on a firm's daily operation by automating specified tasks and making sure things do not fall between the cracks. For example, a WorkFlow could be designed to automatically generate a thank you letter, create a follow-up calendar entry, and send an e-mail to the billing clerk whenever a new client is added to the system. WorkFlows are extremely powerful and can be customized to match your firm's workflow and way of doing things.

> **More Info – WorkFlows**
>
> **Help Topics – Look up WorkFlows in the Index**
>
> **KB Article R11307 – All About WorkFlows**
> **www.support.PracticeMaster.com/main/R11307.htm**
>
> **PracticeMaster Manual – Chapter 11: WorkFlows**

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.

Quick Guides

Quick Guides are short documents that introduce features by focusing on what you need to know to get started. They are ideal for users as an introduction to the most commonly used features in PracticeMaster. Quick Guides are great for users who want to start using the software right away with minimal instruction or training. Quick Guides are provided in PDF format and can be accessed via Help and on the Internet via our Knowledge Base in Article R11130, "PracticeMaster Quick Guides," using the following link: www.support.PracticeMaster.com/main/R11130.htm

Training Videos

PracticeMaster and Tabs3 include numerous training videos to help you learn the software. Training videos are ideal for self-guided learning and show you how to use the various features in 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 is installed with the software and is easily accessed by pressing F1, by clicking the button, or by selecting the ***Help | Help Topics*** menu option. Help includes detailed information regarding specific programs. Clicking the 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

The PracticeMaster manual is installed with the software in PDF format. Shortcuts are created during installation. From the **Start** menu, point to ***Tabs3 & PracticeMaster | Documentation | PracticeMaster | PracticeMaster 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 www.PracticeMaster.com/support/docs.html.

Knowledge Base

PracticeMaster and Tabs3 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.PracticeMaster.com.

For example, as a new PracticeMaster user, you may find it necessary to add new fields to a file for tracking information unique to your firm. Knowledge Base Article R11001, "How to Add New Fields to PracticeMaster Files and Form Layouts," provides step-by-step instructions for these common procedures. 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

PracticeMaster and Tabs3 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.

PracticeMaster 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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