Tabs3® Palm

www.Tabs3.com

Product Guide

Tabs3 Palm Application Manual

Version 16 (January 2012)

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Introduction & Getting Started

Software Technology, Inc.

Since 1979, Software Technology, Inc. has been developing, selling and supporting billing, practice management and financial software for law firms—from solos to 50+ attorney firms. Our software is backed by our professional staff, which has extensive experience in accounting, program development and customer support. We are committed to providing our customers with user-proven, reliable software.

Tabs3 Palm Application Overview

Software Technology Inc.'s Tabs3 Palm Application software gives you the ability to integrate Tabs3 with handheld computers, such as Palm Inc.'s Palm™ Handhelds. This allows users to accurately keep track of billable time and expenses for clients while working away from the office and later HotSync those transactions to Tabs3. Handheld users have the ability to edit or delete any fee or cost transaction on the handheld prior to HotSyncing them to Tabs3. The Tabs3 Palm Application alleviates the additional time and expense of having to record transactions, then having someone enter the transactions into Tabs3 at a later date. The handheld device can interface with a PC running Tabs3 and transfer all of the recorded transactions for clients directly into Tabs3 attributing all fee, cost, and expense transactions to the appropriate timekeeper. If Tabs3 is set up to integrate with Tabs3 General Ledger Software (GLS), debits and credits for cost transactions will automatically be created and posted to GLS at the time you synchronize transactions from the handheld computer.

The following is a list of features that are available in the Tabs3 Palm Application on the handheld:

- ❑ Ability to add Fee and Cost transactions.
- ❑ Ability to edit or delete Fee and Cost transactions in the handheld prior to HotSyncing.
- ❑ Ability to specify which timekeeper worked on a fee transaction.
- ❑ Ability to time fee transactions using the Timer feature.
- ❑ Ability to browse Client information.
- ❑ Ability to browse Timekeeper information.
- ❑ Ability to browse Category information.
- ❑ Ability to browse Tcode information.
- ❑ Ability to browse Task Code information.

Computer Requirements

To integrate a handheld computer with Tabs3 the following software and hardware is required:

System Requirements

- Windows 7/Vista/XP.
- 40 MB of free hard disk space for Tabs3.
- 52 MB of free hard disk space for System Configuration. System Configuration must be installed in order to use Tabs3.
- This software must be installed on a system that supports long file names. This software will not run on older Novell servers that do not support long file names.
- A Palm OS® Version 4 or 5 compatible handheld computer with 1 MB of RAM.
- Wireless networks are not recommended or supported.

Software Requirements

- System Configuration and Tabs3 Version 16 are required in order to use the Tabs3 Palm Application program.
- Palm Desktop program Version 4.

Installation

Installation & Configuration

There are three software systems required to set up Tabs3 integration with the handheld:

Palm Desktop The Palm Desktop software includes the HotSync® Manager that is provided with the handheld. The HotSync® Manager is used to sync information from Tabs3 to the handheld as well as fee and cost transactions from the handheld to Tabs3.

Tabs3 Palm App The Tabs3 Palm Application software from Software Technology, Inc., is installed on the handheld. This program displays the Tabs3 client, timekeeper, category, tcode and task code lookup information and also allows you to add fee and cost transactions.

Tabs3 Palm Sync The Tabs3 Palm Sync program (i.e., TBPALM.EXE) from Software Technology, Inc., is installed in the Tabs3 program directory. The Tabs3 Palm Sync program works behind the scenes with the HotSync® Manager to pass lookup information from Tabs3 to the handheld as well as fee or cost transactions from the handheld to Tabs3.

Installation Overview

The following represents a summary of the installation process to set up the integration between the handheld and Tabs3.

1. **Set up System Configuration User IDs** *(File|Open|Users)*. These users will be used as your handheld User IDs.

   Note: For integration with Tabs3, the user(s) of the handheld(s) must be set up as users in the System Configuration program. To integrate properly, the user of the handheld ***must*** have the same name as the User ID in the System Configuration program. The System Configuration program only allows 8 characters for the User ID and does not allow spaces or special characters other than the underscore character. If the user name on the handheld does not match these requirements, you will need to rename the user of the handheld to conform to the 8-character limit. ***Instructions for changing the user name of the handheld can be found in Appendix A of this manual on page 22.***

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2. **Install the Palm Desktop software** as discussed in the "Installing Palm Desktop Software" section on page 4. If you already have the Palm Desktop software installed, you can skip to step 4.

3. **Configure Handheld Users** in the Palm Desktop software *(Tools|Users)*.

   Note: This step is necessary only if you are configuring multiple handheld users at this time.

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4. **Install the Tabs3 Palm Sync** program and the **Tabs3 Palm Application** program as described in the "Installing Tabs3 Palm Sync and Tabs3 Palm Application" section on page 4.

5. **Install the Tabs3 Palm Application** program onto the handheld device as described in the "Installing the Tabs3 Palm Application Program on the Handheld" section on page 5.

6. **Create Tabs3 Palm Application Data Files** by running the program in Tabs3 and HotSync the data to the handheld as described in the "Create Tabs3 Palm Application Data Files" section on page 6.

Palm Desktop/Tabs3 Setup

In order for the Handheld integration to work, the User ID in System Configuration and the User in the Palm Desktop must match as shown in Fig. 1 and Fig. 2.

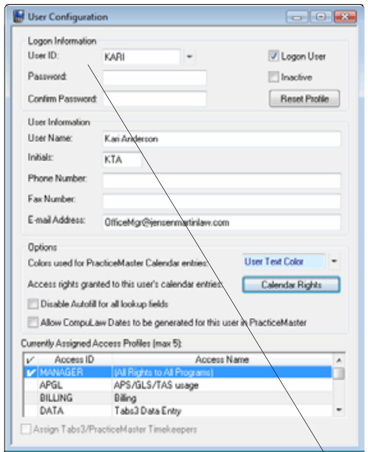


Fig. 1, System Configuration
User Configuration Window

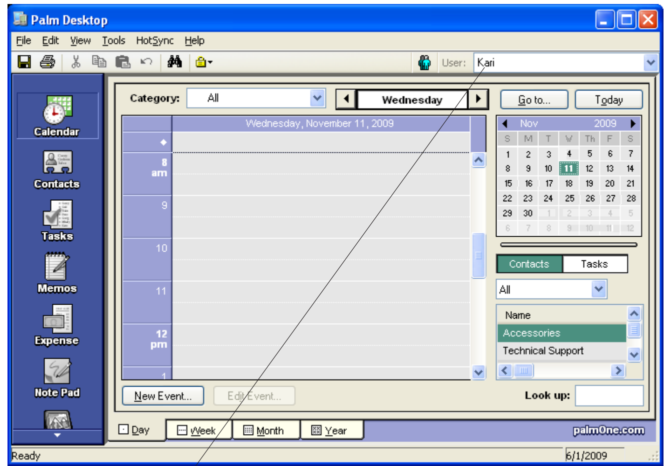


Fig. 2, Palm Desktop Program

For our example, **Kari** is the same user in both System Configuration and the Palm Desktop.

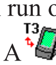
Installing Palm Desktop Software

The Palm Desktop software needs to be installed on each PC that will be used to HotSync. To install the Palm Desktop software, follow the instructions included with the handheld.

Note: If you are configuring the Tabs3 integration to work with multiple User IDs and multiple handheld users, you will need to set up each user in the Palm Desktop software. Consult the handheld manual for instructions on setting up multiple users.

Note: If you are setting up multiple users to use the Tabs3 Palm Application with the handheld, setting up a user profile in the Palm Desktop software will not work. You must configure each user separately.

Installing the Tabs3 Palm Sync and the Tabs3 Palm Application

The Tabs3 Palm Sync and the Tabs3 Palm Application software are supplied on the CD, and are installed to the workstation during the Local Install. These programs can be installed once SETUP.EXE has been run on the workstation. During the installation, the Tabs3 Palm Sync program is added to the Startup folder. A  icon will be displayed in the Windows system tray when the program is running. In order for a HotSync to complete between Tabs3 and the handheld, the Tabs3 Palm Sync program must be running as well as the HotSync® Manager.

When the Tabs3 Palm Application program is installed, a SATFORMS directory is added under Tabs3's program directory. The SATFORMS directory contains the files used to install the Tabs3 Palm Application onto the handheld.

▸ To install the Tabs3 Palm Sync & the Tabs3 Palm Application

1. Browse to the Tabs3 & PracticeMaster directory on the server, and run SETUP.EXE.

2. A Local Installation window will be displayed. Follow the on-screen instructions to install the software. From the checklist of products, select **System Configuration**, **Tabs3**, **Tabs3 Palm Application**, and any other software you would like installed.

Once the installation is complete, a **Palm Software** folder is added to the ***Start | Programs | Tabs3 & PracticeMaster*** folder. This folder includes the following programs:

Install Tabs3 Palm App	This program is usually used only once to install the Tabs3 Palm Application onto the handheld.
Tabs3 Palm Sync	This program must be running in order to HotSync information between Tabs3 and the handheld. Therefore, a shortcut to this program is also installed in the Windows Startup menu, which automatically loads the program each time the computer is started. This program works behind the scenes with the HotSync® Manager to pass information between Tabs3 and the handheld.
Update Tabs3 Palm Desktop Link	This program is usually not needed. This program is used to update registry entries that provide a link between the handheld and Tabs3.

Note: Previous versions of Tabs3 Palm App included an Update Registry shortcut. This shortcut and program is obsolete in the current version, but may still appear in the directory if the software was updated from a prior version.

Installing the Tabs3 Palm Application Program on the Handheld

In addition to installing the Tabs3 Palm Application on each computer that will perform a HotSync operation, the Palm Application software must also be installed on each handheld.

Note: Before proceeding with the following instructions, make sure the Palm Desktop software has already been installed on the computer that will be performing the HotSync operations. Verify that the handheld is connected to the workstation and ready to HotSync.

► To install the Tabs3 Palm Application to the Handheld

1. Click the **Start** button, and then select ***Programs | Tabs3 & PracticeMaster | Palm Software | Install Tabs3 Palm App***.

   Note: If the **Palm Software** menu option is not shown in the Software Technology folder, the required folder and its contents can be added to your workstation by running the SETUP.EXE program located in Tabs3's program directory. You can access the SETUP.EXE program using the following steps:
   1. From the workstation, click the **Start** button, and then click **Run**.
   2. Click the **Browse** button and select the directory where Tabs3 is installed. Then, select the **SETUP.EXE** file found in the directory and click **OK** to run the program.
   3. Follow the on-screen instructions to run the **SETUP** program.

2. Handheld Registry entries will be created, the HotSync® Manager will be started and the "Tabs3 PRC Installer" window will be displayed. Specify the User of the handheld in the **User Name** field as shown in Fig. 3.

3. Click the **Install** button.

4. A "Waiting for HotSync" window will be displayed. Press the **HotSync** button on the handheld to continue.

5. The Tabs3 Palm Application program will be installed on the handheld.

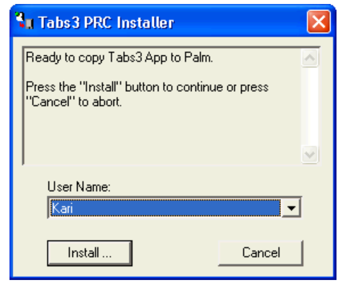


Fig. 3, Tabs3 PRC Installer Window

Create Tabs3 Palm Application Data Files

Before performing a second HotSync, you will need to run the Handheld Integration program in Tabs3 to create the files for synchronization. This program creates the Palm Application data files that are used to pass the Tabs3 client, timekeeper, category, tcode and task code information to the handheld during a HotSync. Detailed information regarding the Handheld Integration program can be found on page 19.

1. Start Tabs3.

2. From the **Integration** Task Folder, click the 'Handheld Integration' icon.

3. On the **Client** tab, specify the client, timekeeper, or category range to be included.

4. On the **Type** tab, in the **Handheld Type** field, select **Tabs3 Palm App Data Files**.

5. In the **Client Order** field, specify the order you want clients listed in the client lookup windows on the handheld.

6. Click **OK**.

7. Once the task is complete, click **OK**.

8. Close the Handheld Integration window.

9. Press the **HotSync** button on the handheld to transfer the data files to the handheld.

Uninstalling the Tabs3 Palm Application on the Handheld

Note: The following steps may vary between handheld devices.

▶ To uninstall the Tabs3 Palm App

1. From the handheld, on the Application Screen, tap the time displayed in the upper left corner.

2. Once the **App** menu is displayed, tap the **Delete** menu option.

3. Tap **Tabs3** and then tap **Delete**.

4. Tap **Yes** to confirm you want to delete the program and data.

5. Repeat steps 3 and 4 to delete Sat.FormsRDK and SFE_LSListBox.

Note: The Tabs3 Palm Application uses the Satellite Forms Application. Therefore, be aware that deleting the Sat.FormsRDK and SFE_LSListBox may affect other Satellite Forms Applications installed on the handheld.

Tabs3 Palm Application

Once you have set up the handheld to integrate with Tabs3 and the Tabs3 Palm Application data files are HotSynced to the handheld, you are ready to begin to use the Tabs3 Palm Application on your handheld. The icon will be displayed on the handheld.

To use the Tabs3 Palm Application

Tap This button displays the Tabs3 Palm Application (App) program as shown in Fig. 4. Tapping the various buttons on the Tabs3 Palm App screen displays the associated program.

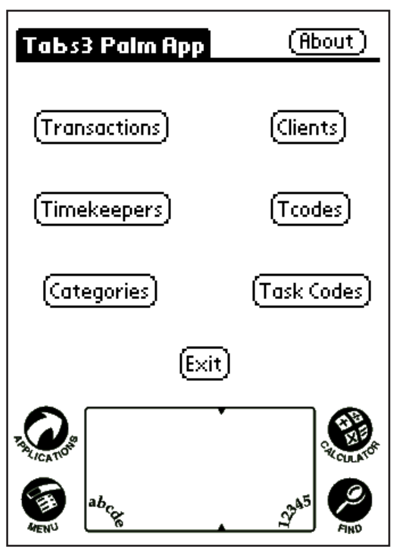


Fig. 4, Tabs3 Palm App Screen

Tabs3 Palm Application Buttons

When using the software on the handheld, the following buttons can be used to perform various functions.

Add — Tapping the **Add** button allows you to add a record to the file you are accessing.

Cost — Tapping the **Cost** button displays a Cost window allowing you to add or view a cost transaction.

Done — Tapping the **Done** button closes the window, saving any changes made.

Fee — Tapping the **Fee** button displays a Fee window allowing you to add or view a fee transaction.

Prev — Tapping the **Prev** button displays the information for the previous record in the file.

Timer — Tapping the **Timer** button in a Fee screen acts like a toggle switch to start or stop the Timer. Stopping the timer adds the time to the fee transaction's **Hours** field.

Cancel — Tapping the **Cancel** button closes the window without saving the record.

Delete — Tapping the **Delete** button deletes the selected record from the handheld.

Exit — Tapping the **Exit** button closes the Tabs3 Palm Application.

Next — Tapping the **Next** button displays the information for the next record in the file.

Select — Tapping the **Select** button displays the detailed information for the highlighted item.

View — Tapping the **View** button displays the information for the highlighted record.

Transactions

The Tabs3 Palm Application software allows you to add fee and cost transactions. Once a fee or cost transaction is added on the handheld, the transaction can be edited or deleted prior to HotSyncing with Tabs3. When transactions are HotSynced to the main system, they are deleted from the handheld (provided there are no errors).

Tap Transactions — Tapping this button on the Tabs3 Palm App screen displays a Transaction List screen as shown in Fig. 5. The transactions are listed in entry order. The first column indicates whether the transaction is a fee (F) or cost (C). The second column includes the assigned Client ID. The third column includes the transaction description. Tapping a fee transaction in the list or the **Fee** button displays a Fee screen with the following information: Client ID, Timekeeper (Tmkpr), Tcode, Non-Billable, Date, Hours, and Description (Desc) as shown in Fig. 6. Tapping a cost transaction in the list or the **Cost** button displays a Cost screen with the following information: Client ID, Tcode, Non-Billable, Date, Amount (Amt) and Description (Desc) as shown in Fig. 7.

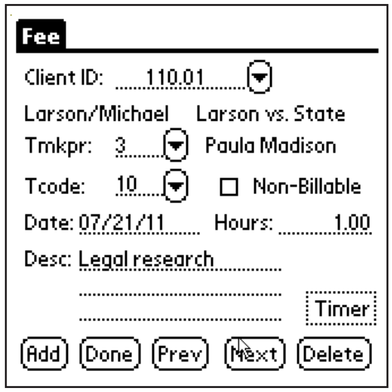


Fig. 6, Fee Screen

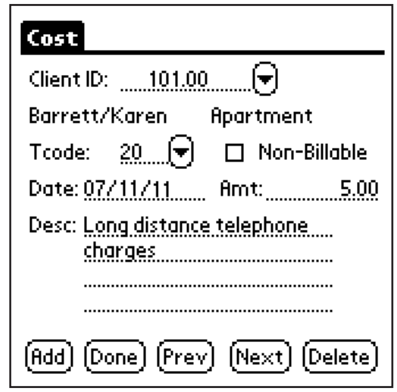


Fig. 7, Cost Screen

Fee Transactions

The Tabs3 Palm Application on the handheld allows you to add, edit or delete fee transactions on the handheld. The fee transactions can then be transferred to the Tabs3 system via the HotSync process.

▸ To add fee transactions from the Transaction List screen

Tap Fee — When fee transactions are included on the Transaction List screen, tapping the **Fee** button displays the selected fee or the most recent fee added as shown in Fig. 6. However, if no fee transactions are included in the Transaction List, tapping the **Fee** button allows you to automatically add a new fee.

Tap — When there are existing fee transactions in the Transaction List, you must tap the **Add** button on the Fee screen to add a new fee transaction.

Fee Transaction Fields

When adding a fee transaction, the following fields are available:

Client ID — The **Client ID** field is used to assign a client to the fee transaction. Tapping the drop-down arrow next to the **Client ID** field displays the Client List screen allowing you to select a client from the list. The order in which the clients are displayed is determined by the **Client Order** that was specified when the Tabs3 Palm App data files were created using the Handheld Integration program. The **Find** field or the arrows on the right side of the Client List screen can be used to advance to a specific client in the list. Selecting a client from the list displays the client name and work description below the **Client ID** field. Fig. 13 and Fig. 14 on page 13 are examples of a Client List screen.

Tmkpr — The **Tmkpr** field is used to specify which Timekeeper performed the work for the fee transaction. Clicking the drop-down arrow next to the **Tmkpr** field displays a Timekeeper List screen allowing you to select a Timekeeper from the list. Selecting a Timekeeper from the list displays the Timekeeper name next to the **Tmkpr** field. Fig. 16 on page 14 is an example of a Timekeeper List.

Tcode — The **Tcode** field is used to assign a Tcode to the fee transaction. Tapping the drop-down arrow next to the **Tcode** field displays the Tcode List screen allowing you to select a Tcode from the list. Fig. 18 on page 14 is an example of a Tcode List screen.

Non-Billable

The **Non-Billable** check box is used to indicate whether a transaction is billable or non-billable. By default, the **Non-Billable** check box is cleared unless you select a non-billable client or a non-billable tcode. Selecting the **Non-Billable** check box indicates the transaction is not a billable transaction.

Date

The **Date** field is used to specify a Date for the transaction. Tapping the **Date** field displays a Select Date screen allowing you to select a date from the calendar as shown in Fig. 8. By default, the date in the **Date** field is the system date on the handheld.

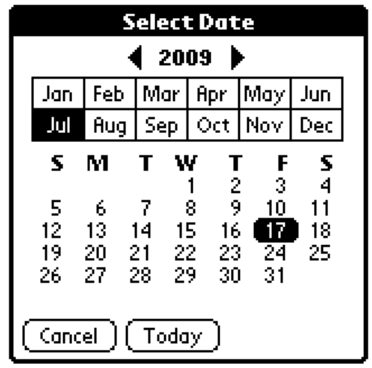


Fig. 8, Select Date Screen

Hours

The **Hours** field is used to specify the amount of time for the fee transaction. A range of 9,999.99 to -999.99 is allowed. For example, 1 hour and 15 minutes is entered as 1.25. A credit entry is made by preceding the number with a minus sign (i.e., -1.25)

Timer

The **Timer** button can be used to time a fee transaction. Tapping the **Timer** button displays a timer in the upper right corner of the Fee screen as shown in Fig. 9. Tapping the **Timer** button a second time stops the timer and the time from the timer is added to the **Hours** field as shown in Fig. 10. The settings for the “Minimum Time” and “Rounded Time Increment” Timer Options on the **Options** tab in Tabs3 Customization are also used as the settings for the timer in the handheld device.

Minimum Time — This Tabs3 Customization option allows you to specify a minimum time to be added to the **Hours** field if the elapsed time is not greater than the Minimum Time specified.

Rounded Time Increment — This Tabs3 Customization option allows you to specify the portion of an hour that you want the time elapsed rounded to.

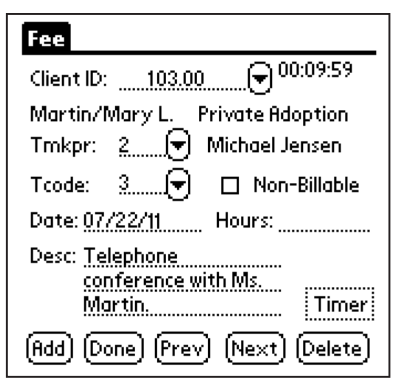


Fig. 9, Timer Running

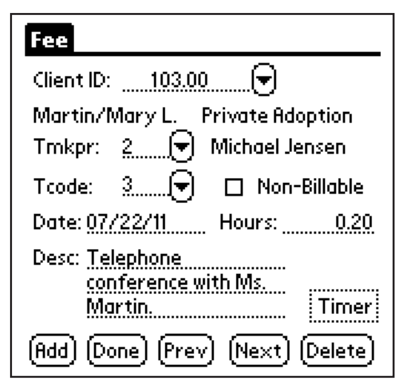
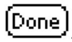


Fig. 10, Time Added to Hours Field

Desc The **Desc** field can be used to include a description for the fee transaction. When a tcode is specified in the **TCode** field, the default description will be displayed in the **Desc** field replacing any existing description. The **Desc** field allows you to enter information for the transaction as well as add additional information to the Tcode description.

To save the fee transaction, tap .

Cost Transactions

The Tabs3 Palm Application allows you to add, edit or delete cost transactions on the handheld. The cost transactions can then be transferred to the Tabs3 system via the HotSync process.

▸ To add cost transactions from the Transaction List screen

Tap When cost transactions are included on the Transaction List screen, tapping the **Cost** button displays the selected cost or the most recent cost added as shown in Fig. 11. However, if no cost transactions are included in the Transaction List, tapping the **Cost** button allows you to automatically add a new cost.

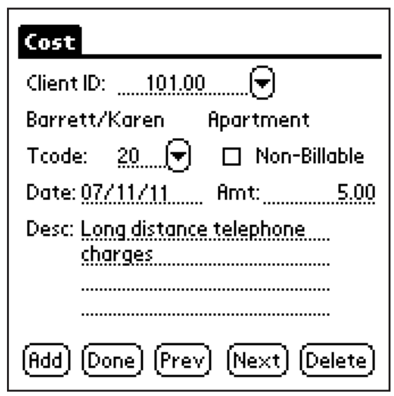


Fig. 11, Cost Screen

Tap When there are existing cost transactions in the Transaction List, you must tap the **Add** button on the Cost screen to add a new cost transaction.

Cost Transaction Fields

When adding a cost transaction, the following fields are available:

Client ID The **Client ID** field is used to assign a Client ID to the cost transaction. Tapping the drop-down arrow next to the **Client ID** field displays the Client List screen allowing you to select a Client ID from the list. The order in which the clients are displayed is determined by the **Client Order** that was specified when the Tabs3 Palm App data files were created using the Handheld Integration program. The **Find** field or the arrows on the right side of the Client List screen can be used to advance to a specific client in the list. Selecting a client from the list displays the client name and work description below the **Client ID** field. Fig. 13 and Fig. 14 on page 13 are examples of a Client List screen.

Tcode — The **Tcode** field is used to assign a Tcode to the cost transaction. Tapping the drop-down arrow next to the **Tcode** field displays the Tcode List screen allowing you to select a cost tcode from the list. Although cost tcodes in the Palm Application have a Type of "C" (cost), they are actually the transaction codes from Tabs3 that have either "Expense" or "Advance" in the Tabs3 transaction code's **Trans. Type** field. Fig. 18 on page 14 is an example of a Tcode List screen.

Non-Billable — The **Non-Billable** check box is used to indicate whether a transaction is billable or non-billable. By default, the **Non-Billable** check box is cleared unless you select a non-billable client or a non-billable tcode. Selecting the **Non-Billable** check box indicates the transaction is not a billable transaction.

Date — The **Date** field is used to specify a Date for the transaction. Tapping the **Date** field displays a Select Date screen allowing you to select a date from the calendar as shown in Fig. 12. By default, the date in the **Date** field is the system date on the handheld.

Fig. 12, Select Date Screen

Amt — The **Amt** field is used to specify the amount of the cost transaction. A range of -999,999.99 to 9,999,999.99 is allowed. A credit entry is made by preceding the number with a minus sign (i.e., -150.50).

Desc — The **Desc** field can be used to include a description for the cost transaction. When a Tcode is specified in the **Tcode** field, the default description will be displayed in the **Desc** field replacing any existing description. The **Desc** field allows you to enter information for the transaction as well as add additional information to the Tcode description.

To save the cost transaction, tap Done.

Client Information

The Tabs3 Palm Application software on the handheld allows you to view Client information transferred from the Tabs3 system.

Tap Clients — Tapping this button on the Tabs3 Palm App screen displays a Client List. The order in which the clients are displayed is determined by the **Client Order** that was specified when the Tabs3 Palm App data files were created using the Handheld Integration program. Specifying a **Client Order** of **Client ID** displays a Client List as shown in Fig. 13. Specifying a **Client Order** of **Name Search** displays a Client List as shown in Fig. 14. The **Find** field or the arrows on the right side of the screen can be used to advance to a specific client in the list. Tapping the **Select** or **View** button when a client is highlighted displays the information for the client. The following information is included as shown in Fig. 15: Client ID, Name, Work Description (Desc), Primary Timekeeper, Category and whether or not the client is a Task Based Billing client.

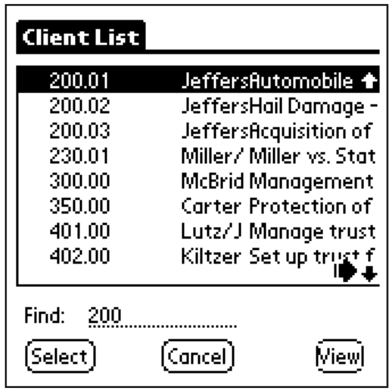


Fig. 13, Client List - Client ID Order

Fig. 14, Client List - Name Search Order

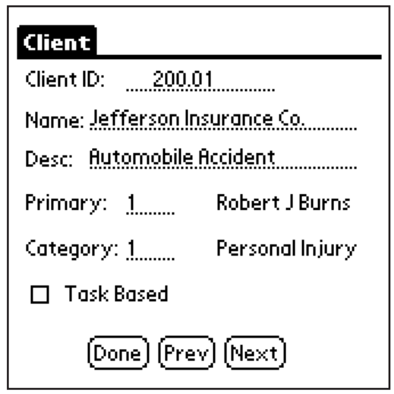


Fig. 15, Client Screen

Timekeeper Information

The Tabs3 Palm Application software on the handheld allows you to view a list of timekeepers transferred from the Tabs3 system.

Tap Timekeeper Tapping this button on the Tabs3 Palm App screen displays the Timekeeper List as shown in Fig. 16. Highlighting a timekeeper record in the list and tapping the **Select** or **View** button displays the Timekeeper number and the Timekeeper Name as shown in Fig. 17.

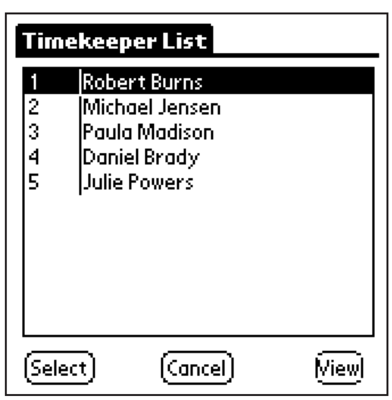


Fig. 16, Timekeeper List Screen

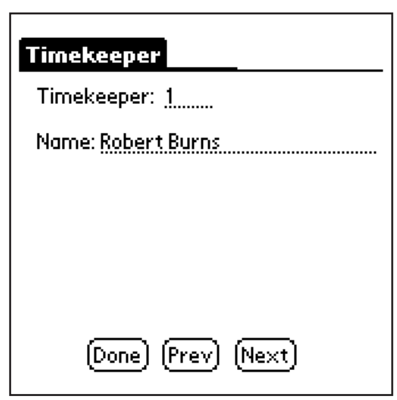


Fig. 17, Timekeeper Screen

Tcode Information

The Tabs3 Palm Application software on the handheld allows you to view Transaction Code (Tcode) information transferred from the Tabs3 system.

Tap Tcodes

Tapping this button on the Tabs3 Palm App screen displays the Tcode List screen as shown in Fig. 18. Highlighting a Tcode record in the list and tapping the **Select** or **View** button displays the information for the Tcode. The following information is displayed as shown in Fig. 19: Tcode, Type and Description (Desc). The **Type** field will include an “F” for a fee tcode and a “C” for a cost tcode (i.e., expenses and advances).

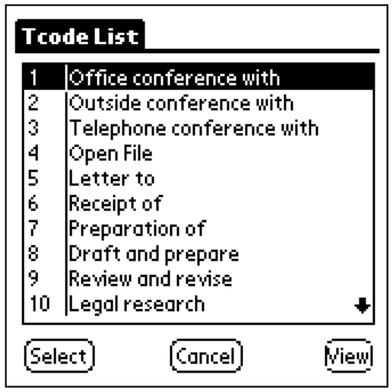


Fig. 18, Tcode List

Fig. 19, Tcode Screen

Category Information

The Tabs3 Palm Application software on the handheld allows you to view Category information transferred from the Tabs3 system.

Tap Categories

Tapping this button on the Tabs3 Palm App screen displays the Category List as shown in Fig. 20. Highlighting a Category record in the list and tapping the **Select** or **View** button displays the information for the Category. The category number, description and whether the category is associated with a Task Code Set is displayed as shown in Fig. 21.

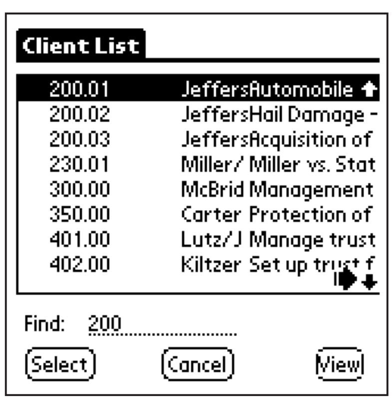


Fig. 20, Category List

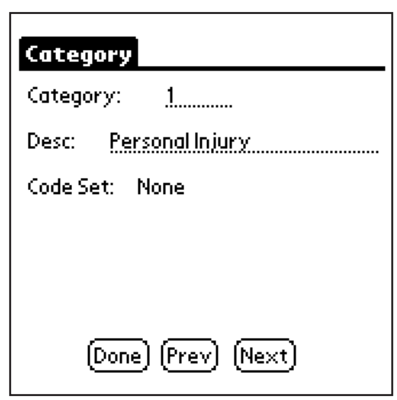


Fig. 21, Category Screen

Task Code Information

The Tabs3 Palm Application software on the handheld allows you to view Task Code Information transferred from the Tabs3 system.

Tap Task Codes — Tapping this button on the Tabs3 Palm App screen displays the Task Code List as shown in Fig. 22. Highlighting a Task Code in the list and tapping the **Select** or **View** button displays the information for the Task Code. The Task Code description and associated tcode is displayed as shown in Fig. 23.

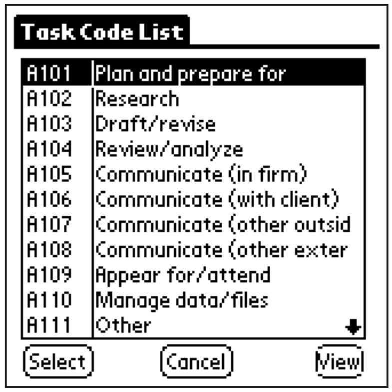


Fig. 22, Task Code List

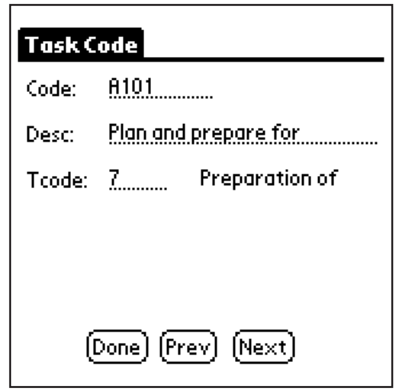


Fig. 23, Task Code Screen

HotSyncing to Tabs3

When a HotSync is performed, any fee or cost transactions added on the handheld are transferred to Tabs3 and then removed from the handheld (provided there are no errors). All existing lookup data files on the handheld (i.e, clients, timekeepers, tcodes, etc.) will remain unchanged in the handheld unless new Tabs3 Palm App data files are created prior to the HotSync.

The following steps can be used to HotSync Tabs3 and the handheld if you do *not* want different or updated client, timekeeper, tcode, task code or category information passed to the handheld.

To HotSync the Handheld to Tabs3

1. Make sure the  icon is displayed on the Host PC's Desktop System Tray. If the icon is missing, click ***Start* | *Programs* | *Tabs3 & PracticeMaster* | *Palm Software* | *Tabs3 Palm Sync*** to start the program.

2. Place the handheld in its cradle.

3. Press the **HotSync** button on the handheld.

4. Once the HotSync is complete, a T3PALM.LOG file is created if errors were encountered. View the T3PALM.LOG file located in the Tabs3 program directory on the Tabs3 computer with any text editor such as Windows Notepad to determine if any errors were reported.

Note: Any new clients added to Tabs3 will not be passed to the handheld when using the above procedure.

The following steps can be used to HotSync Tabs3 and the handheld if you want new and updated information passed to the handheld.

▸ To HotSync the Handheld and Tabs3 with New and Updated Information

1. Start Tabs3.
2. From the **Integration** Task Folder, click the 'Handheld Integration' icon. *(Detailed information regarding the Handheld Integration program can be found on page 19.)*
3. On the **Client** tab, specify the client, timekeeper, or category range to be included.
4. On the **Type** tab, in the **Handheld Type** field, select **Tabs3 Palm App Data Files**.
5. In the **Client Order** field, specify the order you want clients listed in the client lookup windows on the handheld.
6. Click **OK**.
7. Once the task is complete, click **OK** and then close the Handheld Integration window.
8. Make sure the T3 icon is displayed on the Host PC's Desktop System Tray. If the icon is missing, click ***Start | Programs | Tabs3 & PracticeMaster | Palm Software | Tabs3 Palm Sync*** to start the program.
9. Place the handheld in its cradle.
10. Press the **HotSync** button on the handheld.
11. Once the HotSync is complete, a T3PALM.LOG file is created if errors were encountered. View the T3PALM.LOG file located in the Tabs3 program directory with any text editor such as Windows Notepad to determine if any errors were reported.

HotSyncing Notes

The following is a list of important guidelines to be aware of when performing a HotSync:

All Transactions

- All fee and cost transactions without a valid Client ID, Timekeeper, Date or Tcode will not be merged into Tabs3 and will be left in the handheld device. These transactions can be edited on the handheld.
- Fee and cost transactions are merged into Tabs3 and the associated Verification Lists for the User ID of the handheld will be updated.
- All fee and cost transactions are merged into Tabs3 with a source of "Billing".
- All fee and cost transactions are merged into Tabs3 with a status of "P-Print".
- Credit fee and cost transactions added to the handheld using a tcode with a Non-Printable Bill Code will not be merged into Tabs3 and will be left in the handheld device.

- Non-Billable fee and cost transactions with a credit for hours or amount will not be merged into Tabs3 and will be left in the handheld device.
- Assigned Timekeepers do not apply when using the Tabs3 Palm Application.

Fee Transactions

- The Category assigned to the client will be the category assigned to the handheld transaction when it is merged.
- Rates are assigned based on the default billing rate for the client.
- Amounts are calculated based on the hours entered in the handheld multiplied by the default billing rate from Tabs3.
- If a cost tcode is used for a fee entry, it will be merged. However, cost tcodes set up with a predefined amount or rate (i.e., value billing) are not merged using the predefined amount. Those transactions will need to be edited in Tabs3 after they are merged.
- Non-Billable fee transactions added for a client set up to assess sales tax *and* assigned a tcode that is set up to assess sales tax will be merged into Tabs3 with a Bill Code of 0 (Billable/Printable).

Cost Transactions

- If a fee tcode is used for a cost transaction, the transaction will not be merged into Tabs3, an error will be generated and the transaction will be left in the handheld device.
- Cost transactions created using the Tabs3 Palm Application do not integrate with QuickBooks®.

Bill Codes for Fees or Costs from the Tabs3 Palm Application

Billable Client with the Handheld Entry Set as Non-Billable
(the Non-Billable check box selected)

Tcode Bill Code 0 (Billable/Printable)	Merges with a Bill Code of 2 (Non-Billable/Printable)
Tcode Bill Code 1 (Non-Billable/Non-Printable)	Merges with a Bill Code of 1 (Non-Billable/Non-Printable)
Tcode Bill Code 2 (Non-Billable/Printable)	Merges with a Bill Code of 2 (Non-Billable/Printable)
Tcode Bill Code 3 (Billable/Non-Printable)	Merges with a Bill Code of 1 (Non-Billable/Non-Printable)
Tcode Bill Code 4 (Billable/Always Print)	Merges with a Bill Code of 2 (Non-Billable/Printable)

Billable Client with the Handheld Entry Set as Billable
(the Non-Billable check box cleared)

Tcode Bill Code 0 (Billable/Printable)	Merges with a Bill Code of 0 (Billable/Printable)
Tcode Bill Code 1 (Non-Billable/Non-Printable)	Merges with a Bill Code of 3 (Billable/Non-Printable)
Tcode Bill Code 2 (Non-Billable/Printable)	Merges with a Bill Code of 0 (Billable/Printable)
Tcode Bill Code 3 (Billable/Non-Printable)	Merges with a Bill Code of 3 (Billable/Non-Printable)

Tcode Bill Code 4 (Billable/Always Print)	Merges with a Bill Code of 4 (Billable/Always Print)

Non-Billable Client with Entry set as Non-Billable or Billable

Tcode Bill Code 0 (Billable/Printable)	Merges with a Bill Code of 2 (Non-Billable/Printable)
Tcode Bill Code 1 (Non-Billable/Non-Printable)	Merges with a Bill Code of 1 (Non-Billable/Non-Printable)
Tcode Bill Code 2 (Non-Billable/Printable)	Merges with a Bill Code of 2 (Non-Billable/Printable)
Tcode Bill Code 3 (Billable/Non-Printable)	Merges with a Bill Code of 1 (Non-Billable/Non-Printable)
Tcode Bill Code 4 (Billable/Always Print)	Merges with a Bill Code of 2 (Non-Billable/Printable)

Sales Tax Codes

When transactions are merged, Tabs3 uses the Sales Tax Code assigned to the client and whether the tcode is taxable to determine whether the merged transaction is taxable.

Client is taxable and tcode is taxable	Sales Tax = Y
Client is taxable and tcode is not taxable	Sales Tax = N
Client is non-taxable and tcode is taxable	Sales Tax = N
Client is non-taxable and tcode is non-taxable	Sales Tax = N

Error Messages & Troubleshooting

Detailed information regarding errors when a HotSync is performed can be found in our Knowledge Base at:

www.support.Tabs3.com

Search for article R10655 or the keyword “Tabs3 Palm App”.

Creating & Using Palm App Data Files

The Tabs3 Palm Application data files are the key for accurately integrating information between a handheld device and Tabs3. These files are created in Tabs3 and are used to populate data in the handheld device. The data files hold the following information.

- ❑ Client ID and Client Information
- ❑ Timekeeper Information
- ❑ Category Information
- ❑ TCode Information
- ❑ Task Code Information
- ❑ Timer Settings (i.e., Minimum Time and Rounded Time Increment)

Creating Tabs3 Palm App Data Files

The Tabs3 Palm App data files are created using the Handheld Integration program in Tabs3. These data files will be added to the handheld during the next HotSync. The Palm App data files are deleted from the Tabs3 working directory once transferred to the handheld. However, each time a HotSync is performed, all Palm App data files are stored in the handheld until new data files are created. If you are working with several handhelds and users, it is especially important to log into Tabs3 with the associated User ID when creating the data files prior to performing a HotSync. Doing so will help eliminate potential conflicts in transferring information between the handheld and Tabs3.

Handheld Integration

Menu Selections	***Maintenance | Integration | Handheld Integration***
Task Folders	***Integration | Handheld Integration***
Help	***Handheld Integration***

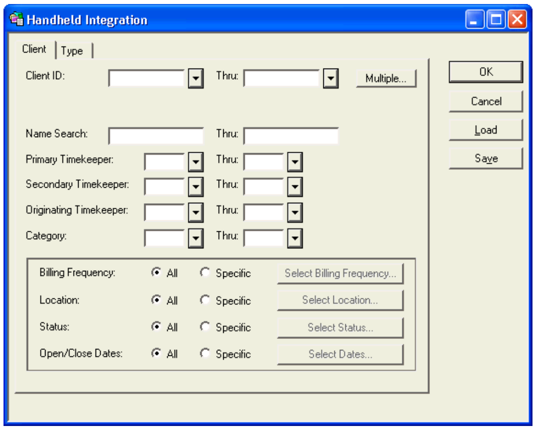


Fig. 24, **Client** Tab of the Handheld Integration Window

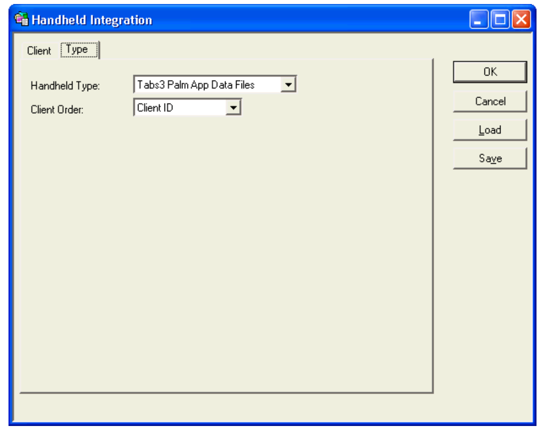


Fig. 25, **Type** Tab of the Handheld Integration Window

The Handheld Integration window allows you to create data files for the Palm Application as shown in Fig. 24 and Fig. 25.

Client Tab

The following fields are used on the **Client** tab when creating data files:

Client ID

Enter the range of Client IDs you want included. If you only want to include one client, enter the client's ID in the beginning and ending range fields. If you change the beginning range field, the ending range will default to the value entered in the beginning range. A blank range indicates all clients will be included regardless of the Client ID. The drop-down button can be used to open the Client Lookup window that allows you to view a list of clients and select a client record by double-clicking it.

Multiple

The **Multiple** button can be used to select multiple ranges of Client IDs. After clicking the **Multiple** button, the Ranges dialog box will be displayed allowing you to specify up to 50 client ranges.

Name Search

Enter the range of client names you want included. For example, if you enter "AB" as the beginning range and "D" as the ending range, all clients whose Name Search field begins with "AB" through all clients whose Name Search begins with "D" will be included. A blank range indicates all clients will be included regardless of Name Search.

Primary Timekeeper
Secondary Timekeeper
Originating Timekeeper

Maximum of 3 characters (timekeeper number or initials) for each field. Enter the ranges of primary, secondary and originating timekeepers you want used to select which clients to include. The timekeepers specified here represent the timekeepers assigned in the client data entry program—not the timekeepers assigned to the individual fee and cost transactions. A blank range indicates all clients will be included regardless of the timekeeper assigned to the client. The drop-down button can be used to open the Timekeeper Lookup window that allows you to view a list of timekeepers and select any timekeeper by double-clicking it.

Category

Maximum of 3 digits (1-999). Enter the range of category numbers you want to use to select the clients to include. The category specified here represents the category assigned in the client data entry program—not the category assigned to

	the individual fee transactions. A blank range indicates all clients will be included regardless of the category assigned to the client. The drop-down button can be used to open the Category Lookup window that allows you to view a list of categories and select any category by double-clicking it.
Billing Frequency	Each client is assigned a billing frequency on the **Stmt Options** tab of the client data entry program. Select the desired option.
Location	Each client is assigned to a location on the **Address** tab of the client data entry program. Select the desired option.
Status	Each client can be designated as an inactive client, progress billing client, non-billable client and/or task based billing client on the **Status** tab of the client data entry program. Select the desired option.
Open/Close Dates	Each client is assigned a Date Opened and Date Closed on the **Desc** tab of the client data entry program. Select the desired option.

Type Tab

The following fields are used on the **Type** tab when creating data files:

Handheld Type

This field is used to specify the format the data files are to be created in. When creating Palm Application data files, select **Create Tabs3 Palm App Data Files** from the drop-down list. *(Note: This option will not be shown unless TBPALM.EXE has been installed.)*

Client Order

This field is available only when the **Handheld Type** of **Tabs3 Palm App Data Files** is selected. Select the order in which you want clients listed in the client lookup windows on the handheld. The **Client Order** specified also determines whether the **Client ID** or **Name Search** will be used with the Tabs3 Palm App **Find** function.

Select **Client ID** if you want clients listed in Client ID order on the handheld and want to find clients on the handheld using their Client ID.

Select **Name Search** if you want clients listed in alphabetical order by their **Name Search** field and want to find clients on the handheld using their Name Search.

Running the Handheld Integration Program

The **OK** button can be used to begin the creation of the data files. Once the process has been started, a status window will be displayed indicating the progress of the program.

The **Cancel** button can be used to close the Handheld Integration window.

Note: If a data file already exists, a message will be displayed. Click **OK** if you want to overwrite the contents of the existing data file. Otherwise, click **Cancel** if you want to use the contents of the existing data file.

Data File Names for Handheld Devices

The data files are created and saved in the Tabs3 working directory. The table below includes the names of the data files that are created and the Tabs3 source files.

Data Files Created for Tabs3 Palm App				
Data File	**Source File**		**Data File**	**Source File**
T3CLIENT.DBF	Client File		T3TBCODE.DBF	Task Bill Code File
T3EMPL.DBF	Timekeeper File		T3CODSET.DBF	Task Bill Code File
T3TCODE.DBF	Transaction Code File		T3CUSTOM.DBF	Customization File
T3CAT.DBF	Category File		T3CLTSRT.DBF	Client File

Appendix A
Changing the Handheld User

There are two instances where you may need to rename the user of your handheld:

- If you already have handheld users set up and the User ID in the Palm Desktop software does not match the requirements in the System Configuration software, you will need to rename the user in the Palm Desktop software. System Configuration requires that the User ID be no longer than 8 characters and does not allow spaces or other special characters other than the underscore character.
- If you are sharing a handheld between users, you will need to reset the user on the handheld each time the handheld is given to a different user. Doing so ensures that the fee and cost transactions are written to the correct User ID's Verification Lists in Tabs3 when a HotSync is performed.

Note: Before changing the user name on the handheld, you will want to make sure that you first HotSync the information from the current user. Also, you will need to have the new user set up in the Palm Desktop software and the System Configuration program.

For example, let's say you have two users named John and Mary who are already set up in the Palm Desktop software and the System Configuration program. John has entered information into the Tabs3 Palm Application program on the handheld and wants his information merged into Tabs3. The handheld will then be given to Mary. In this situation, you would perform the following:

1. HotSync John's transactions into Tabs3. Check to see if any transactions were not merged and resolve them. *(Note: Since you don't want to update John's information on the handheld, it is not necessary to create new Tabs3 Palm App data files before HotSyncing.)*

2. Reset the handheld for Mary as described below.

3. Create handheld data files in Tabs3 for Mary's information. *(Note: When creating the data files, a message may be displayed indicating the data files already exist. Click **Yes** to overwrite the data because you want to create data files that contain Mary's information.)*

4. HotSync Mary's information into the handheld.

5. The handheld can now be given to Mary.

Resetting the Handheld User Name

The following steps can be used to reset the handheld user name. The procedure for resetting the handheld user name may vary between different handheld devices. If the following steps do not work on the handheld, refer to the documentation provided with the handheld.

Handheld Selections	***Applications* | *Memo Pad* | *New***
Write	A cursive lowercase “L” on the letter portion of the graffiti pad. *(This is the same symbol used for activating shortcuts defined in the Handheld Manual.)*
Tap twice	On the letter side of the graffiti pad.
Write or Insert	The number 5 on the number portion of the graffiti pad. The text in the memo will disappear after inserting the number 5.
Tap	***Done* | *Applications***
Run HotSync	This opens the HotSync Progress window. When identifying the user, a dialog box will show the user list from the Palm Desktop software. Select the new handheld user. A message will be displayed asking you to reset the handheld.
Tap	Reset. The user has now been reset.

Note: You can check to see if the user on the handheld has changed by making the handheld selections ***Applications* | *HotSync*** immediately after changing the user. At the top of the screen it will say Welcome <User>. If the above steps do not allow you to reset the user, you will need to first perform a soft reset as described in your Handheld Handbook and then repeat the steps to reset the user.
