PracticeMaster®

Tutorials

www.PracticeMaster.com

PracticeMaster
Reseller/User Tutorial
Version 15.3 for November 2009 Sample Data

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Version 15.3 (July 2009)

PracticeMaster Version 15 Tutorial

Thank you for reviewing PracticeMaster.

PracticeMaster is available in two different levels: PracticeMaster Basic and PracticeMaster Premier. During this tutorial, you will be working with PracticeMaster Premier. A comparison matrix located on our Web site *(www.PracticeMaster.com)* can be used to compare PracticeMaster Basic and PracticeMaster Premier. The PracticeMaster Help also includes a detailed list of the features available in the two levels.

This tutorial uses a step-by-step approach that is ideal for self-guided instruction. Just sit down at your computer with your keyboard in front of you, the tutorial at your side, and follow along. If you have any questions while you are using the tutorial, you can refer to your PracticeMaster manual or Help for a more detailed explanation, or call our Technical Support Department at (402) 419-2210.

During the tutorial, you will be shown how to add Clients, Related Parties, Calendar entries, and Journal records. You will also learn how to use the Display Calendar as well as perform a Conflict of Interest Search.

Throughout this tutorial, information that requires a physical response appears in **bold** type for easy identification. For example:

Press: **F2**	You should press the **F2** function key.
Click: **OK**	You should select the specified item by clicking the primary mouse button once (usually the left mouse button).
Double-click: **Client 100**	You should select the specified item by clicking the primary mouse button twice.
Right-click: the **Client ID** field	You should click the secondary mouse button (usually the right mouse button) once on the specified field .
Type: **LAR**	You should type the characters "**LAR**" without pressing **Enter** or **Tab.**
Enter: **1**	You should type "1" and then press the **Tab** key on your keyboard.

Your responses will consist of **PRESS**ing a key, **CLICK**ing, **DOUBLE-CLICK**ing, **TYPE**ing and **ENTER**ing information. Keep in mind that the instruction "Enter" requires that you press the Tab key after typing in the information whereas the instruction "Type" does not.

Installation and Getting Started

Installing the Software

Using this tutorial requires that both System Configuration and PracticeMaster are installed. The installation process will install both of these systems at the same time. System Configuration is used to configure users, passwords, groups, access rights, and firm information.

Note: Instructions to install the software are provided with the CD.

Note: Unless you plan on working with this trial system from multiple workstations, it isn't necessary to install the software on multiple workstations. If multiple workstations will be working on this trial system, each workstation should run the SETUP program located on the file server after installing the software. This process installs the required files and Windows shortcuts on the workstation.

Sample Data

The **Trial Software with Sample Data** program group is found under the **Tabs3 & PracticeMaster** program group and is always installed. Two sets of icons are included in this group: **Sample Data** icons and **Refresh** icons. Use the **Sample Data** icons found in this folder to access the sample data. This data can be refreshed back to its original status at any time by using the appropriate **Refresh** icons. Using or refreshing the sample data has no effect on your regular data files because the sample data is located in a directory named TUTOR that is created under the directory specified during the SETUP process.

Since the sample data is automatically installed, no additional steps are required to create the sample data unless you have already added, changed, or deleted any of the information in the sample data. In that case, the sample data can be refreshed back to its original status by using the appropriate **Refresh** icons in the same area.

Starting Up PracticeMaster

Now let's start PracticeMaster. This can be done via the Windows taskbar.

Windows Taskbar

PracticeMaster is accessed via the Windows taskbar. Click the **Start** button, and then point to **All Programs**. Point to the folder named **Tabs3 & PracticeMaster,** and then point to the **Trial Software with Sample Data** folder. Click the **PracticeMaster with Sample Data** icon.

Note: Make sure you select the **PracticeMaster with Sample Data** icon found in the **Trial Software with Sample Data** program group. Otherwise, the sample data will not be present.

Oops! Does your screen show “PracticeMaster Customization” instead of the PracticeMaster main application window? If so, press the ESC key to close Customization. A message will be displayed indicating that Customization data must be saved. Click **OK**. You started PracticeMaster using the wrong icon in the wrong group. You must start PracticeMaster using the **PracticeMaster with Sample Data** icon in the **Trial Software with Sample Data** program group instead of the **PracticeMaster** icon in the **Tabs3 & PracticeMaster** group.

After starting PracticeMaster, a message will be displayed indicating that while you are using this sample data, your system date in the Tabs3/PracticeMaster software will be set to 11/17/2009. This will not affect any other software on your computer.

Click: **OK** To close the dialog box and display the task folders.

Task Folders

There are three different ways to access the various programs within PracticeMaster. Programs can be accessed using the menu bar, the Task Folders, or the PracticeMaster Task Bar. The task folders in PracticeMaster are portrayed as file folders that contain the various PracticeMaster functions. Each folder contains icons for the programs in the folder. Once the desired file folder is selected, a program can be started by clicking the appropriate icon. Programs can also be accessed via the PracticeMaster Task Bar. The PracticeMaster Task Bar represents the tasks that are configured on the **Main** tab of the Task Folders. Fig. 1 is an example of the PracticeMaster window with the task folders and PracticeMaster Task Bar displayed.

This tutorial uses the task folders, PracticeMaster Task Bar and menu bar to access the various PracticeMaster functions.

The PracticeMaster main application window (Fig. 1) will be displayed when starting PracticeMaster.

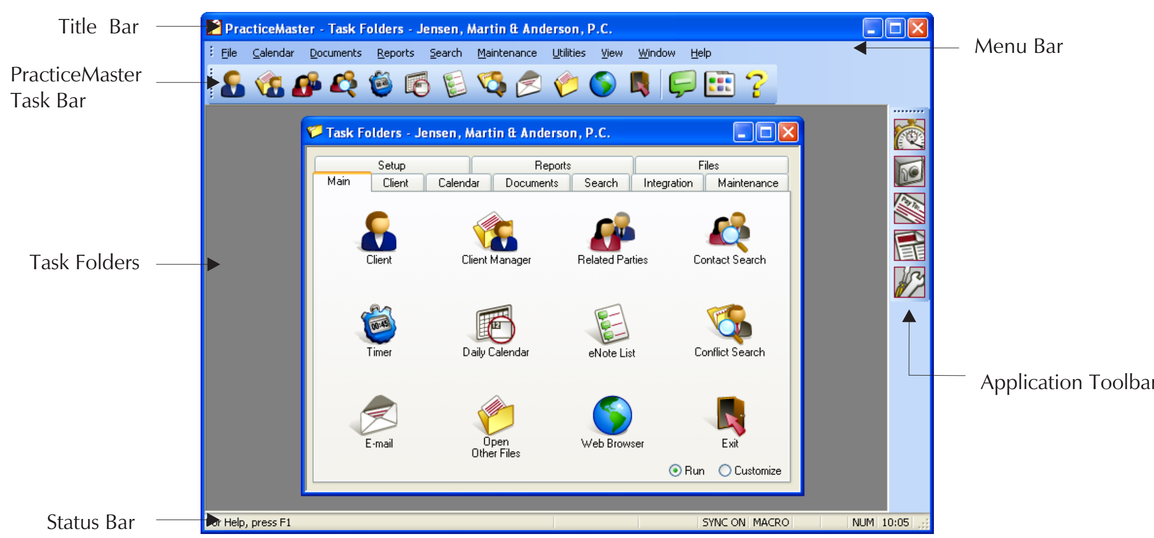


Fig. 1, PracticeMaster Window with Task Folders Displayed

Definitions

PracticeMaster uses some terminology that you will need to know before we get started. The following is a list of words and their definitions as used in PracticeMaster.

PM PM is an abbreviation for PracticeMaster.

Area of Practice
An Area of Practice consists of a database of various files, documents, and reports that are unique to a particular area of law. Area of Practice is sometimes abbreviated as AOP.

Area of Practice Files
Each Area of Practice has data files that are unique to that Area of Practice. All Area of Practice files can be modified through File Maintenance.

Area of Practice Template
An Area of Practice Template consists of predefined file definitions for an Area of Practice. Area of Practice Templates are available on the PracticeMaster CD. Additionally, Area of Practice Templates may be provided by a third party developer or they can be created using the File Maintenance program.

System Files
System Files in PracticeMaster consist of the Client File, Calendar File, Lookup Files, Common Client Related Files, and Miscellaneous Support Files. For the most part, these files are provided with PracticeMaster. Users can add Lookup Files and Common Client Related Files.

Field
A field is one item of data. The Client Name and the Originating Timekeeper are examples of fields in a client record.

Record
A record consists of a group of data fields. An example of a record would be a single calendar record. A data file consists of a group of similar records, such as fee records in the fee file.

File
A file is a group of similar records. For example, each employee in the Employee file has an employee record.

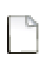
Section 1
Data Entry

The Client Information program is used to enter information about clients. Let's add a new client.

From the task folders,

Click: the **Main** task folder — To display the icons included on the **Main** task folder.

Click: the **Client** icon — To select the Client data entry program.

Click:  — To add a new client. A New Client Record window will be displayed. From here you can enter a new Client ID. By using the **Next Available Client ID** button the program can assign the next available Client ID. We will use a specific Client ID.

Type: **300.00** — In the **New Client ID** field.

Click: **OK** — To add client 300.00.

Enter: **Roper/John**	In the **Name (Last/First)** field.
Press: the **Tab** key	To advance to the next field. Notice that Roper/John is automatically entered into the **Alpha Search** field. Press the Enter key. PracticeMaster uses either the Tab key or the Enter key in the data entry windows to move to the next field.
Enter: **2130 S. 27th St.**	In the **Address Line 1** field. We will not be adding any information in the **Address Line 2** or **Address Line 3** fields so,
Click: the **City** field	To position the cursor in this field.
Enter: **Lincoln**	In the **City** field.
Enter: **NE**	In the **State** field.
Enter: **68503**	In the **Zip** field.
Click: the **Contact** field	To position the cursor in this field.
Enter: **John Roper**	In the **Contact** field.
Type: **402-453-3568**	In the **Office Phone** field. Notice the button next to the **Office**, **Home**, **Fax** and **Cellular** fields. This button allows you to access the phone dialer to automatically dial the phone number. All fields designated as a type of **Phone** in File Maintenance are accompanied by this button. An optional phone extension field with a maximum of 5 characters can be entered as well.
Click: the **E-mail** field	To position the cursor in this field.
Type: **jroper@aol.com**	Notice the button next to the **E-mail** field. This button opens PracticeMaster's Send E-mail program where you can send e-mail. See the PracticeMaster Help for more information on the E-mail program.
Click: the **Setup** tab	To view the contents of the **Setup** tab.
Click:	Next to the **Area of Practice** field. The **Area of Practice Lookup** window will be displayed.
Double-click: **PI**	To select the Personal Injury Law Area of Practice.
Click:	Next to the **Billing Category** field.
Double-click: **65**	To select the Personal Injury Category.
Press: **Ctrl + PgDn**	To move to the **Details** tab. Notice that some of the fields are already filled in for you based on information we have already added.
Click:	Next to the **Salutation** field. This is an Alpha field that has been set up to use a drop-down list. This field was not selected to be restricted to the list so we can either select an option on the list or type in our own. We will select an option from the list.
Click: **Mr.**	To select the Salutation.
Type: **3/15/71**	In the **Date of Birth** field.
Click:	Next to the **Referred By** field to display the Related Party Lookup window. The Related Party file is a system-wide file that can be used to

	store information for frequently used "system-wide" parties and contacts. This file is designed to be used as a firm-wide address book, Rolodex®, or contact management system.
Click: 	Next to the **Filter** group of the Quick Clicks pane.
Click: **Related Party Category**	In the **Filter** group of the Quick Clicks pane.
Click: 	Next to the **Related Party Category** field to view the different Related Party Categories. We only want to view the insurance agents.
Click: **Insurance Agent**	To place a check mark next to the Insurance Agent category.
Click: **OK**	To select the option. Notice that the list of Related Parties is left with only three records. The Filter feature can be very helpful when trying to locate a record when you know one or two things about the record but you do not know what the exact record is. It can also help during data entry so that you do not have to search through a long list of records that do not pertain to what you are looking for. The insurance agent that referred this client is not in our database yet. Let's add him.
Click: 	To add a new record. A New Related Party window will be displayed. PracticeMaster allows you to add records "on the fly". This keeps you from having to go in and out of data entry windows allowing you to add a record that is not available.
Type: **Kingman/Andrew**	In the **Related Party Key (Last/First)** field.
Click: **OK**	To create the new Related Party record.
Click: 	Next to the **Category** field.
Double-click: **Insurance Agent**	To give this record a category of Insurance Agent.
Press: the **Tab** key (twice)	To move to the **Organization** field.

Enter the following information into the remaining fields on the **Related Party** tab.

Organization	**Kingman Insurance Co.**
Address	**1001 S. 10th St.**
City	**Lincoln**
State	**NE**
Zip	**68503**
Work Phone	**402-474-4692**

We will not add any more information to the **Related Party** tab. Let's move on to the **Contact/Misc.** tab.

Click: the **Contact/Misc.** tab	Let's enter the following information on this tab.
Salutation	**Mr.**
Contact Name	**Andrew Kingman**
Secondary Contact	**Bret Harrington**

Notice that the **First Contact Date** defaults to mm/dd/yyyy. Suppose you don't know the exact date that you contacted this person but you know it was approximately two weeks ago.

Right-click:	the **First Contact Date** field	If you successfully right-clicked the **First Contact Date** field, a shortcut menu with the various options for the date field will be displayed.
Click:	**QuickDate Calculator**	To select the **QuickDate Calculator** menu option. A QuickDate Calculator window will be displayed. You can adjust a date by a specified number of days, weeks, months or years.
Type:	**-2**	In the **Adjust Original Date By** field. Since you are adjusting the date to a date in the past, a negative number is used. If you were going to change this date to a date in the future, a positive number would be used. The settings used to calculate a date can be saved in folders and reused for subsequent date adjustments. Saved QuickDates are available in all Tabs3 programs.
Click:	the **Weeks** option	The date will be adjusted by -2 weeks.
Click:	**OK**	To accept these options. The **First Contact Date** field will be changed to a date that is two weeks prior to the current system date.

We will not enter any more information on the **Contact/Misc.** tab. Click the **Alternate Address** tab. This tab is used to enter addresses that may be needed for the Related Party. We will not be making any changes on this tab.

Click:		To save the Related Party record that we just created.
Click:	the **List** tab	The record that we just added, **Kingman/Andrew** should be highlighted. (If Kingman/Andrew is not highlighted, highlight the record before continuing.)
Click:	**OK**	To select the record.
Click:	the **Court** tab	To display the contents of the **Court** tab. We will not enter any information into these fields.
Click:		To save the client record that we just created.

The remainder of the tabs in the Client data entry screens are used to quickly view, add, change, or delete records from other files that pertain to the client you are viewing. Let's look at the remaining tabs. Click the **Calendar**, **Journal**, **Docs**, **Fees**, and **Costs** tabs to view their contents.

Click:	the **Client Related** tab	The **Client Related** tab includes files that pertain to the specific client that you are viewing. The contents of this tab will differ depending on the Area of Practice that is assigned to the client. Notice that client 300.00 which we assigned to the Personal Injury Law Area of Practice has **Other Case Information** and **Accident Information** listed as the 6th and 7th files. Let's look at another Client with a different Area of Practice.
Click:	the **List** tab	To view the **List** tab.
Press:	the **PgUp** key	To view a list of clients.
Click:	**121.01**	To select client **121.01**.
Click:	the **Client Related** tab	To view the files listed for client 121.01. Notice that the 7th and 8th files listed are now **General Information** and **Purchase Information**. This is because client 121.01 is assigned to the Real Estate Area of Practice. The ability to get to all files related to a client makes the Client data entry program a very powerful tool.

Click:  To close the Client data entry window.

Section 2
Conflict of Interest Search

Conflict of Interest Search

PracticeMaster's Conflict of Interest Search searches PracticeMaster data files for specified text to help determine if any conflicts are present. PracticeMaster's Conflict of Interest Search is extremely powerful and flexible. Fully indexed files are used, resulting in extremely fast search times. You can search for words in a single field or within the same record.

From the **Main** task folder,

Click:	the **Conflict Search** icon	To select the Conflict of Interest Search program.
Type:	**WILLIAMS**	In the **Search for** field. You can search for multiple words; each word must be separated by a space. Up to 512 characters can be specified. Each word can only be 28 characters long.

The remaining options can have a large effect on what results will be given when the report is run. The **Phrase Match** section determines if one or all of the words need to be present in the record in order for it to be listed on the report. The **Word Order** determines if multiple searches need to be in the same record, same field or immediately next to each other. The **Search Options** section determines if the search can match partial words (Starts with or Contains) or a Phonetic Search can be performed.

Click:	**Search**	To begin the search. The Print dialog box will be displayed allowing you to print, preview or save the report to a text or HTML file.
Click:		To display a list of Windows printers that have been installed. Select the desired printer from the list.
Click:	**Preview**	To begin previewing the report.

The Conflict of Interest Report will list the Client (if applicable), the file and each field that contained a conflict with the field's contents. PracticeMaster's preview windows have powerful "drill-down" capabilities. Let's try it.

Click:	the first occurrence of **101.00**	Notice that when you hover over 101.00 it becomes highlighted in yellow. The yellow highlight indicates you can drill-down to the record. If you have successfully clicked 101.00, you should now be on the **Address** tab of the Client data entry program.
Press:	**Esc**	To close the Client data entry program and return to the Conflict of Interest Report. Let's see what happens when we select the field that is located below this Client ID.
Click:	the first occurrence of **Williams**	In the line "Client Name: **Williams**/John". You are once again taken to the Client data entry program, but this time your cursor is located in the exact field where the conflict was found. So, when a Client ID is

highlighted and selected, the Client data entry program will be shown. If the conflict itself is selected, the exact record and field where the conflict was found will be shown.

Press: **Esc** repeatedly — Until you are back to the task folders.

Note: Only fields that have the **Include in Conflict Search** check box selected in File Maintenance will be searched. Step-by-step instructions on how to select this check box can be found by going to *Help|Help Topics* and typing **Conflict of Interest Search** on the **Index** tab. The subtopic of "Configuring Fields for Conflict of Interest Searching" will open the "**How to Configure Fields for Conflict of Interest Searching**" Help topic. Additionally, you can customize PracticeMaster to include additional fields on the report. Step-by-step instructions on how to configure to include additional fields on the report can be found by going to *Help|Help Topics* and typing **Conflict of Interest Search** on the **Index** tab. The subtopic of "Configuring Fields for Conflict Report" will open the **"How to Configure Fields to be Included on the Conflict of Interest Report"** Help topic.

Section 3
Calendar

The Calendar is an important tool in every office. PracticeMaster's calendar tracks your appointments and tasks as well as the appointments and tasks for each person in the office, thus making it easier to schedule new appointments or company meetings. The Calendar program is designed not only to remind you of events that are fast approaching, but of tasks that need to be completed. Let's go through a couple definitions that we will be using in this section.

Event — An event is a type of calendar record. An event calendar record includes a start time and end time for a specific date.

Task — A task is a type of calendar record that needs to be completed. For example, you need to contact a client to set up a meeting. Tasks do not have end times. However, tasks can be assigned a specific due date and start time.

Quick Alarm — A Quick Alarm can be used in the current PracticeMaster session to notify the current user of an event. Quick Alarms can only be set for the current system date.

Calendar File

There are many different ways to access the Calendar data entry windows. We will focus on accessing the Calendar File via the menu bar.

From the menu bar,

Click: **Calendar**

Click: **Calendar File** — To open the Calendar file. Let's start by adding a new calendar record.

Press:	**Ctrl +N**	To add a new calendar record.
Enter:	**11/30/09**	In the **Due Date** field.
Type:	**Dep**	In the **Calendar Code** field and press the Enter key to use this predefined Calendar Code. Notice that the **Description** field is automatically filled in with "Deposition of" which is the description of the Calendar Code.
Type:	**13th & M Street, Suite 201**	In the **Location** field and press the Enter key.
Press:	the **End** key	To move to the end of the text in the **Description** field. Press the space bar.
Type:	**Charles Defano.**	To complete the sentence in the **Description** field. We will not add anything to the **Comments** field.
Click:	the **Type** field	To position the cursor in this field. A drop-down list is displayed. This list allows you to select a type of either **Event** or **Task**. This calendar record will be an event.
Click:	**Event**	Then press the Tab key.
Enter:	**800**	In the **Start Time** field. Notice that "8:00 AM" is entered in the **Start Time** field. PracticeMaster automatically defaults times between 7 and 11 to be AM and times between 12 and 6 to be PM. You can override this by using a 24 hour clock or by typing "a" or "p" immediately after the time that you enter.
Enter:	**1100**	In the **End Time** field. Notice that "11:00 AM" is entered in the **End Time** field.
Enter:	**Williams**	In the **Client ID** field. We will not be assigning a Related Party.
Press:	the **Tab** key	To move to the **User/Group** field. Notice that "(BLANK)" has already been inserted into the **User/Group** field. This is because we logged into PracticeMaster with the Blank User ID. Let's change the User in this field.
Click:		Next to the **User/Group** field. The Multiple User/Group Lookup window will be displayed. All Users and Groups defined in PracticeMaster are available for you to select.
Click:	**(BLANK)**	To clear the (BLANK) User ID.
Double-click:	**RON**	To select the User ID of RON. *(You may need to scroll through the list of users if you are unable to see the User ID of RON.)*

Let's create a reminder for this record that will print on the Daily Report 1 week before the date of the task.

Click:	the **Reminder 1** field	To position the cursor in this field.
Enter:	**-1 W**	The **Reminder 1** field will now show **-1 Week**. The letters D, W, M and Y can be used to represent days, weeks, months and years respectively. A positive or negative number can be placed before the letter. You can use the drop-down arrow to select a specific date.
Click:		To save the record.
Press:	**ESC**	To return to the task folders.

Display Calendar

The Daily, Weekly, and Monthly Calendars are your visual aids to the happenings at the office. You can see appointments and tasks for yourself as well as other users. You can add, change, or delete calendar records from the Daily, Weekly, or Monthly Calendar views.

From the **Calendar** task folder,

Click: the **Daily Calendar** icon — To open the Daily Calendar window. Notice that the calendar is split into three sections, the Event Calendar, the Date Selector and the Task List. In the Daily Calendar, an All-Day Activities area is also displayed at the top of the Event Calendar.

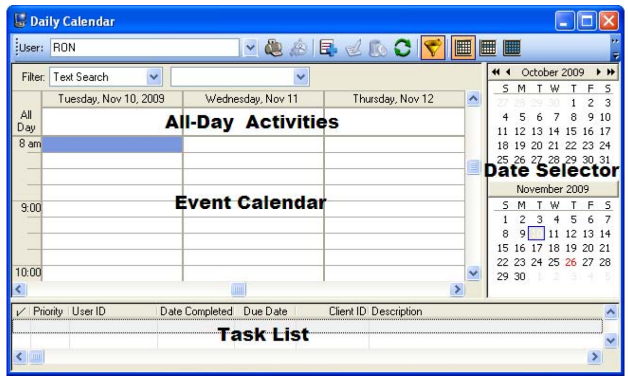


Fig. 2, Daily Calendar Window

Click: (drop-down button) — Next to the **User** field. A list of Users and Groups will be displayed. We want to view all users. Let's select the **All Users** check box.

Click: **All Users** — To select the **All Users** check box.

Click: **OK** — To accept the changes we have made. Let's use the Date Selector on the right side of the window to move to a specific date.

Click: **November 25, 2009** — The Event Calendar will now show November 23, 2009 through November 25, 2009.

Notice that some of the calendar records are displayed with a symbol. The **P** symbol displayed next to a calendar record indicates the record belongs to a Calendar Plan. The symbol indicates the record belongs to a Recurring Date Series. The symbol indicates a Record Alarm will be created when the system date and time matches the calendar record's **Due Date** and **Start Time**. The symbol indicates that more than one user is specified in the **User/Group** field *and* the calendar records are linked.

The colors used on the calendar are currently set to use the Calendar Code colors. Let's change this to use the User's colors.

Right-click: the **Event Calendar** — Various options are available in the shortcut menu.

Click: **Properties** — The Calendar Properties window will be displayed. The Calendar properties program is used to store each user's calendar settings. This program allows you to specify the fields displayed for the calendar records, the calendar record colors, work hours, the Venue for holidays, etc. Move through the different tabs to see the various options. At any time you can click the **Help** button for additional information on a feature.

Click: the **General** tab — The **General** tab contains options that will affect the Daily, Weekly, and Monthly Calendar. The **Event Colors** section determines what colors will be used when the Calendar is displayed.

Click: **Event Colors are based on User ID information** — Under the Event Colors box.

Click: **Display Incomplete Tasks in All-Day Activities Area** — Under the Options box. Selecting this option displays incomplete task calendar records with a due date of the date being viewed in the All-Day Activities area of the Daily Calendar and in the Event Calendar of the Weekly and Monthly Calendar.

Click: **Display Reminders in All-Day Activities Area** — We will not change anything else in the properties at this time.

Click: **OK** — To accept the changes we have made.

Notice the different colors on the Calendar. It is now easier to distinguish between all of the users' entries. This color scheme can help determine the next available time for multiple members of your office to have a meeting.

You will now also be able to see Reminders and tasks in the All-Day Activities area of the Event Calendar. Reminders are displayed with an R . The All-Day Activities area also shows events where the start time equals 12:00 AM and the end time equals 11:59 PM. This allows you to place events such as a vacation or an all-day conference at the top of your calendar and keep the remainder of your calendar from being overcrowded.

By using the Calendar's drag and drop feature, you can also drag a task from the All-Day Activities area to the desired time on the Event Calendar, thus quickly changing the task to an event. Likewise, an event can easily be changed to an all-day event by dragging and dropping the event onto the All-Day Activities area.

Changes to calendar records can be made from the Display Calendar windows. Dates and times can easily be changed or adjusted by using PracticeMaster's drag-and-drop method. On Wednesday, November 25, 2009, user JAN has a meeting with Ben Howard at 9:00. This appointment has been rescheduled for Thursday at 8 a.m. This calendar record can be easily moved to the new date and time. To do this, move your mouse over the left edge of the event frame for the calendar record until the pointer becomes a ✥. Drag the frame to the desired date and time and then release the pointer.

Notice how the new calendar record is displayed in its new location. Let's look at the calendar record.

Double-click: the **calendar record** you just moved — To open the Calendar File window. Look at the **Date** and **Time** fields. They now reflect the date and times of the new location of the record. Now that we are in the calendar record, we can change any other information available such as the Calendar Code, User ID, or Client ID. We can also add new calendar records while displaying the Calendar.

Press: **Esc** — To close the Calendar File window.

Click: **Wednesday, November 25, 2009 at 8:00 a.m.**

Drag: your mouse to 8:30am — To highlight 8:00 to 8:30am.

Right-click: the **Event Calendar** on this date and time — To display the shortcut menu.

Click: **Add New Event** — The Calendar File window will again be displayed allowing you to add a new event calendar record. Notice the **Date** and **Time** fields are automatically filled in with the date and time of the location where you right-clicked the Event Calendar. The **User ID** field is also filled in with the users that you are currently viewing on the Calendar.

Press: the **Tab** key — To move to the **Calendar Code** field.

Type: **MW**	In the **Calendar Code** field and press the tab key. "Meeting with" will be displayed in the **Description** field.
Type: **Conference Room**	In the **Location** field and press the tab key.
Press: the **End** key	To move the cursor to the end of the text in the **Description** field. Press the space bar to insert a space.
Type: **Staff**	To complete the calendar record description. Notice that the **User/Group** field is cleared. We want to add only members of the Staff group.
Click: 	Next to the **User/Group** field to display the Multiple User/Group Lookup window.
Double-click: **STAFF**	To select the **STAFF** group and close the window.
Click: the **Alarm Active** field	To position the cursor in this field.
Click: **Yes**	To indicate that we want an alarm set for this record.
Click: the **Notify** field	To position the cursor in this field.
Type: **5**	An Alarm Notification window will be displayed 5 minutes before the meeting is going to start for each user this calendar record is created for.
Press: **Ctrl + S**	To save the record. PracticeMaster will actually add a separate calendar record for each user in the STAFF group. Therefore, you will be asked if you want to link the calendar records.
Click: **Yes**	A Creating Linked Records window may be displayed and will disappear when PracticeMaster has created all of the records. Notice that a symbol and a symbol is displayed next to each calendar record. The symbol indicates that an alarm is associated with this event. The symbol indicates that more than one user is assigned to the calendar record *and* the calendar records are linked. Try dragging and dropping one of these calendar records. Notice that each record that is linked follows the other records. Linking calendar records is an extremely useful method for scheduling and managing calendar events for multiple users.

Notice the Task List located at the bottom of the Event Calendar window. The Task List is used to display the tasks for the users being viewed on the Calendar. Using the Calendar Properties program, we can specify whether PracticeMaster displays all incomplete tasks, incomplete tasks for a specified day, overdue tasks, or all completed tasks. Overdue tasks are shown in red so that they are easily distinguishable. *(Note: The settings on the **Task List** tab of the Calendar Properties program do not affect the Tasks displayed in the Event Calendar.)*

Press: **ESC**	To return to the Task Folders.

Section 4
Journal File

The Journal file is used to store several different types of records including Timer, Phone, Research, E-mail, Client Notes and Tabs3 Billing Notes records. Each type of record has its own data entry window and is assigned a special Record Type that indicates which type of record it is. We will access the Journal File from the **Files** task folder.

Click: the **Files** task folder — To display the **Files** task folder.

Click: the **Journal** icon — To select the Journal data entry program.

Notice that you are once again shown a **List** tab similar to the one in the Client data entry program. From here you can add, change or delete a record. The first column displayed should be the **Record Type** column. This column shows us what type of record we are looking at.

Click:  — To add a new record. The New Journal Record window will be displayed. You can select the type of record that you will be adding. We are going to create a Client Note record.

Click: **Client Note** — To select Client Note.

Click: **OK** — To create the new Client Notes record. We are taken to the **Client Notes** tab. Notice that the **Date**, **Time**, and **User ID** fields are automatically filled in for you. You can now add the text. Let's say a potential client came into the firm and discussed his situation. Although he decided not to request your services at this time, you still want to record notes regarding the potential client and what was discussed.

Type: **Richard Bransen**
Mr. Bransen is thinking about starting up a cleaning service.

Since Mr. Bransen is not a client, we will not assign a Client ID. Entering the note record allows you to perform searches on it. You can later assign it to a Client ID should the client request your services. We will not change anything else on this Client Note record.

Press: **Ctrl + S** — To save the Client Notes record.

Click: the **List** tab — To return to a list of Journal Records.

> **Tabs3 Integration Note:** Tabs3 Billing Notes are only displayed when integrating with Tabs3. Although these records can be viewed in PracticeMaster, they cannot be edited in PracticeMaster.

Click:  — To close the Journal data entry program.

Thank You!!!

Congratulations! You have completed the PracticeMaster tutorial. The information we have covered in this tutorial will help you get started using PracticeMaster on a daily basis and work on developing your own Areas of Practice and practice management systems. If you have any questions, please feel free to give us a call at (402) 419-2210.

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