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*From
the Nov. 2006 Review of Time & Billing Systems*

Designed

originally for the billing needs of the legal profession, Tabs3 also provides other time-based service professionals, including accountants, with a time and expense management and billing application that combines those functions with AR, reporting, productivity analysis, and other tools. It offers integration with the company's practice management application, PracticeMaster, which offers calendaring, scheduling and contact management. STI also offers optional accounting modules that include GL, AP and trust accounting. Tabs3 supports multiple billing methods. A single-user license that can track time for up to two staff members is \$295; a single-user, five-staff option is \$495. Multi-user packages start at \$495.

Ease of Use/Navigation Features — 4 Stars

Tabs3 provides assistance in setup of clients, staff and rates through the use of wizards, and is generally simple to navigate. The interface opens to a double window, with the smaller window, called Task Folders, providing the primary navigation menu for the system. This tabbed screen displays icons for accessing the work areas of the program, which are grouped into categories/tabs for Main, Client, Transactions, Statement Preparation, Statements, AR, Reports, Month-End, Integration, Utilities/Maintenance and Setup. Each of these tabbed windows provides additional icons for tasks specific to that subject.

The Client Information Screen provides access to most tasks, including general client data, as well as billing options and preferences, budgeting, AR and fund balances and rates, which can be specific to each client, based on staff, or

a combination. The screen includes a client lookup list, which opens into a

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one client can be open at a time, timers must bill to the same client.

The system provides various windows for viewing specific client navigation, including the client lookup window that shows billing information in a summary format, and the client manager feature that shows WIPs, AR, client funds and trust balances.

Management Functions — 4 Stars

Tabs3 supports any number of clients, but the number of timed staff managed is dependent upon the license. Each client can have an individual rate table, and timed staff members can have up to six hourly rates, in addition to six “new” rates that can be set to replace the existing rates on a specific date. Staff can also be combined into groups for productivity analysis and other management functions. Custom rate tables can also be created for individual projects/engagements. In addition to hour-based billing, the system supports flat rate, contingency, split and trust-based billing situations. The basic client contact management functions in Tabs3 allow one contact per business, although more advanced contact management functions are available through integration with PracticeMaster. Likewise, basic calendaring and scheduling functions in Tabs3 provide adequate appointment and task scheduling, but fuller functionality is available through the practice management system. Tabs3 includes strong expensing features that aid in monitoring and billing phone calls, faxes, postal costs and photo copies, in addition to other expense items.

The program's AR functions support up to five aging periods with interest application, while reporting and budget thresholds enable management to stay on top of client accounts and prevent overwork/overbilling that might result in undesired write-offs. Tabs3 includes a Drop Box for storage of *.PDFs and

other electronic documents, and the system can be used with Palm-based PDAs

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and time entry sheets when previewed on-screen. Users can e-mail invoices or multiple documents directly from within the program, or can output reports and invoices to *.PDF format. Reports and invoices can be run individually at any time or can be set up to run in batches.

Integration — 4 Stars

Tabs3 offers integration with MS Outlook primarily for e-mail communications, but when combined with PracticeMaster it also provides two-way integration of contact management and task/calendar functions. The program integrates with QuickBooks for transfer of financial data, and can export reports and invoices in Word and Excel formats. Palm-based PDAs can be used in a synched environment, but live web-based access is not available. Jim Degnan, co-founder of Jacksonville, Florida-based Degnan & Shlafer CPAs (www.degnan-shlafer.com), finds Tabs3's integration capabilities an integral component of the system. "The ability to customize the software and its adaptability to various professional office operations," were two of the reasons the firm selected the product, he said. "Also, the integration with other professional office software such as Outlook, Worldox Document Management software and Palm have proven very useful."

User Support & Help — 4.5 Stars

Tabs sports excellent built-in Help functionality, including various shortcuts and hot keys, right-click menus and other guidance features. The company offers an online support center (accessible via a link within the program), along with FAQs, a documentation library, a monthly newsletter and tutorials. STI offers support packages and a variety of training options.

2006 Overall Rating: 4.5 Stars

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