

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Oct. 29, 2007

*From the Nov. 2007 [Review of Time  
& Billing Systems](#)*

Tabs3 Billing Software Version 14.2 from Software Technology, Inc. is a crossover product from the legal industry, accommodating service-based professionals for 25 years. Able to handle complex hourly rate structures and fixed fee contracts, it offers strong integration with PracticeMaster, the company's suite for calendaring, scheduling and client management. Additional accounting modules for GL, AP and trust accounting can be purchased from the vendor. 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. Optional annual maintenance can be purchased at 30 percent to 35 percent of the license fee.

#### **Ease of Use/Navigation Features — 5 Stars**

The application is intuitive and is relatively straightforward to navigate using a tabbed interface with Task Folders. A user can easily find the tool, wizard or data-entry screen needed to accomplish a particular task. Data entry and retrieval is accommodated well, and there is little difficulty in creating new entries. Groupings are logical for client records and their associated settings for billing preferences, statements and AR. Consolidation of record information is an appreciated timesaver and keeps the application from being overly complex. Rates, notes, budget and AR balances, among other details, are retrieved with the rest of the client's records and made available. Searching for existing records and making updates can be performed with built-in lookup tools.

With the expectation that a single user will be keeping time records current for multiple professionals, new entries can be created via a fee entry window.

For multi-user offices, the timer function is appropriately simple, and the

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

### **Management Functions — 4.5 Stars**

Time and billing records are often used as performance indicators for managers. Tabs3 provides for budget monitoring and notification if a project has exceeded the allotted amount. Profitability of timekeepers and rates of recovery for clients can readily be determined both in timekeeper details and from available reports. Some management tools in Tabs3 may be relevant to the legal community, like the conflict of interest search tool, though these can be useful when providing multiple services to clients. The DropBox function is a receiving box for each software user, intended to receive printed reports, though it can also be used for temporary storage of any data file. Beware, though, files are automatically deleted when the application is closed (a function I regularly desire for the inbox on my desk!).

### **Billing & Reporting — 5 Stars**

A considerable number of reports and report-generating tools are presented to the user, including client-specific transaction reports, budget status, funds, business analytical reports for realization and cash, and write-up/down by client or timekeeper. Reports include sort features and multi-range selections, plus layout options and the ability to save and recall custom settings. To simplify report production, a unique tool called the Suite Manager allows for scheduled production of report groups. Compiled reports can be previewed on-screen, printed, saved in PDF format, or sent to the user's DropBox.

The majority of firms will be adequately served by the many types of billing methods available. Fixed fee, split fee and retainers serve longer-term contract-based obligations. Firms requiring hourly and quoted-hourly can make use of task codes, budgets and hourly rate billing options, as well as track and bill expenses. Summary and detail statements are available, and templates can be created or modified using the statement designer. Designing statements may require a bit

of learning, but the user is given total control over the layout, field selection,

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

the road and make updates for time and billing records, synchronizing the two upon return to the office. DTE InHand software for Palm and the Tabs3 Palm Application

allow for handheld updating of time and fee records. Most importantly, though, is the integration with the Tabs3 PracticeMaster application, a practice management suite with the ability to handle workflows and manage clients. The basic edition of PracticeMaster is included for free.

### **User Support & Help — 5 Stars**

Tabs3 provides a significant level of support for customers, both within the application and via the vendor's website. Support plans are available to receive new versions and updates as well as unlimited software-related technical support. Startup tips encourage users to explore extended functionality of the system, while slideshows can be installed to assist in training and basic user orientation to the screens, tabs and setup tasks. An online newsletter is provided on the website, as is a knowledgebase; both are accessible from within the application.

Extensive Help and comprehensive manuals round out the assistance tools offered.

**2007 Overall Rating: 5 Stars**

Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us