

Synopsis

In this article, tax and estate planning attorney Jason Havens discusses his quest for the perfect case management and time-billing software. Jason's quest took him on a journey through several products, including Abacus Law, Amicus Attorney, and PCLaw. But ultimately, he settled on Tabs3 and PracticeMaster Premier Edition. Why? Read the article to find out. This article contains 1,439 words.

TechnoFeature: Review: Tabs3 and PracticeMaster Premier Edition for the Modern Mobile Lawyer

By Jason E. Havens

(This article is a TechnoLawyer Exclusive.)

INTRODUCTION

Abraham Lincoln once stated, "A lawyer's (time and) advice are his stock and trade." A few days per year (and sometimes more, depending on the year), I think that President Lincoln had an advantage practicing law in a pre-computerized age!

Logically, you would think that computers would make a lawyer's life much easier, tracking that time and efficiently converting the time entries into billing invoices. Indeed, you would think that the information would easily glide from one software application to another.

After all, why should we use computers if they cannot make our professional lives more organized, efficient, and effective?

THE IMPORTANCE OF A PRACTICE MANAGEMENT SYSTEM

The critical hub for today's TechnoLawyer is a practice management system.

In my American Bar Association column on estate planning technology, which appears three times per year in *Probate & Property*, I highlighted several practice management systems in the March/April 2005 issue.

That column highlighted some of my experiences with various systems. Unfortunately, it lacked one system that our office has rather quickly grown to adore: Tabs3 and PracticeMaster (PM) Premier Edition, which are produced by Software Technology, Inc. (STI).

As mentioned in the October 6, 2005 distribution of my TechnoLawyer posting on PracticeMaster and Tabs3 combination, I noted that each practice management system offers unique advantages and disadvantages. No practice management system does absolutely everything that every lawyer would desire.

I doubt that such a solution is possible.

Nevertheless, having a stable practice management system seems like a threshold requirement. With Tabs3 and PM, we found our stable computerized partner for our law business.

OUR CHOICE: TABS3 AND PRACTICEMASTER

Beyond stability, expedient installation, user-friendly graphical interface (especially for a billing program, which is difficult to find in my experience), wireless environment capabilities, allowance of "remote"

("offsite") files on laptops, and integration with our PalmOne Treo smartphones, we desired a practice management system that could actually make our office more efficient, particularly in terms of data entry.

The Tabs3/PM system integrates seamlessly between the respective "front-office" and "back-office" components of the system. That certainly saves time because we can manage our contacts, calendar, and tasks, but can also convert our activities into billing entries which the very capable, easy-to-use, no-accounting-degree-required "back-office" part of the system, Tabs3, converts into billing invoices.

WORKING TOGETHER: SOFTWARE INTEGRATION

Between those activities, you can take your data and put it to work in a very real way. The Tabs3/PM system integrates with HotDocs, one of the most popular document assembly engines available today, and also integrates with the document assembly features within Microsoft Word.

Therefore, our estate planning law office can produce estate planning documents, probate forms, correspondence, and much more using our existing Tabs3/PM data that we have entered.

The "Premier" version of PM includes "area of practice" templates. These pre-configured data sets are designed to collect the typical information for a matter in a given area of law. For example, the "probate" template collects information on the decedent, his or her family members, and his or her assets. We can then transfer the appropriate data to produce documents for that matter.

After billing and collecting from clients, a law firm must of course account for everything. Thankfully, the Tabs3/PM system integrates with QuickBooks, which is probably the most widely-used accounting program on the market.

On the other hand, you can actually use the advanced aspects of Tabs3 to complete your "back-office" solution. For example, you can use the Tabs3 general ledger, trust accounting, and accounts payable software applications, each of which is an additional application.

Unfortunately, STI cannot make its powerful system work "out of the box" with every other software application used in a law office.

Yet you can accomplish this goal in most any situation using STI's open database connectivity (ODBC) driver. Most contemporary software applications comply with ODBC standards. As a result, you can design your own solution, which is what we are doing with our drafting system that runs on a Java platform.

ON THE RUN

In today's ultra-mobile world, though, you generally cannot do all of your work in your office because you have to travel here or there for a meeting, a continuing education program, or some time at home with your family.

Most quality practice management systems offer a "remote" feature. The Tabs3/PM system includes this feature, labeled the "Briefcase," which you can check out and literally enter your data on your laptop. You can also compress and transmit the data over the Internet from a remote workstation to your office's server.

Even while away from the office, you still have PM integration with HotDocs or Microsoft Word to produce your documents.

We also use the Palm conduits provided with the Tabs3/PM system. I did not have any issues with the Palm conduits, which I chose to use exclusively to keep critical information with me at all times and even enter time and expenses "on the road." I encountered some difficulties using STI's Tabs3 and PM applications, which are designed to run as standalone programs on the Palm operating system (similar to PCLaw).

In addition to these two "remote" aspects of the Tabs3/PM system, we hope to design a direct interface between the Tabs3/PM system and an Internet-based application such as Plaxo. While you can use the built-in "Remote Desktop Connection" or a more traditional virtual private network (VPN) to access the

Tabs3/PM system, we want an Internet-based application that securely allows us to obtain our contact, calendar, and task information from anywhere. With an application such as Plaxo, you can securely do just that. Uniquely, Plaxo offers secure socket layer (SSL) encryption for all activity, from signing on to using their application to logging off (fully explained in the "How secure is Plaxo?" answer to typical questions within their "Help Center").

Plaxo already works with personal information management programs such as Microsoft Outlook. We would prefer to use the ODBC driver sold separately by STI to create a true interface between the Tabs3/PM system and Plaxo, which would avoid problems such as creating duplicate entries (very easy to remedy within Plaxo, but not so simple to do within the Tabs3/PM system). In fact, after we accomplish this link (which might require Plaxo's soon-to-be-released, client-side application program interface (API)), we might use Plaxo Mobile Access to update our information on our smartphones, which would eliminate the need to use the Tabs3/PM system's Palm conduits. Having secure, Internet-based access to our firm's information from any connected computer in the world greatly appeals to us. This combination should enable us to accomplish our goal.

UNPARALLELED SUPPORT

The last issue in accomplishing the various links between your practice management system and the other software programs used in your practice centers on support.

Without helpful technical support, I would find it impossible to implement the data links discussed above. I have received very good support from a number of vendors, including Gavel & Gown (Amicus Attorney), LexisNexis (PCLaw), and Abacus Data Systems (Abacus Law).

The training and support provided by STI, however, established a new level of satisfaction for my law firm and me. I know that I am not alone here because other TechnoLawyer members have echoed the same sentiments about STI.

CONCLUSION

Our law office struggled to find a stable practice management system before finding the Tabs3/PM system, which also enables us to implement our "circle of data" approach by utilizing our hub's information to power the other spokes of our firm's wheel.

In today's data-sharing world, you should consider a practice management system that not only works well to address your "front-office" and "back-office" needs, but also integrates with other software applications used in your office. Choosing a practice management system that complies with ODBC standards is critical for this purpose.

Finally, without some helpful support, achieving these goals is most likely a fantasy.

(I am not affiliated with STI in any way, but am merely a very satisfied reviewer and user (evidently along with many others based on the numerous awards presented to STI based on the performance of their Tabs3/PM system.)

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Jason Havens is a Bluewater Bay & Destin, Florida member of the law firm of Havens & Miller, P.L.L.C.. His private law practice focuses on complex estate and charitable gift planning for affluent individuals and families and on behalf of charitable organizations.