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Kurent Adds Trust Accounting, Billing Productivity Tools, and User Roles

By Neil J. Squillante
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When you succeed in business for 40 years, you gain valuable insights into what solos and small firms actually need. When creating a new cloud legal billing product, this means you can carefully add valuable features such as trust accounting, and avoid unnecessary clutter to maximize ease of use.

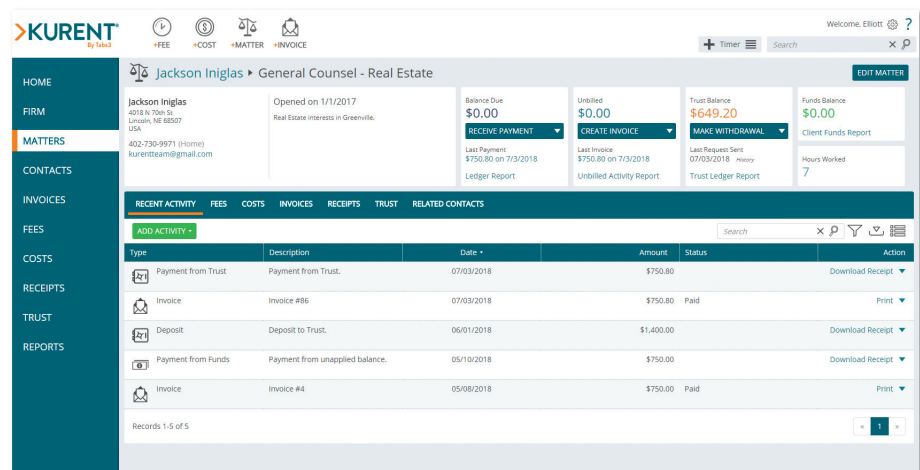
Kurent in One Sentence

Tab3 Software's [Kurent](#) is cloud legal billing software for small firms that now includes trust (IOLTA) accounting as well as [many new productivity features](#).

The Killer Feature

The Trust dashboard in Kurent houses the new trust accounting tools but you can access

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Kurent displays trust account activity within each matter.

much of this functionality in other areas of the software. For example, from within a matter you can create a trust account, set minimum and target balances, send a trust request (these can be automated), pay bills from the trust account, and more.

Creating a trust request generates an invoice that you can email, print, or download as a PDF. LawPay integration enables clients to fund their trust accounts via credit card. To save time, you can batch send trust requests using criteria of your choosing such as all matters below the minimum balance. The Bank Activity and Trust Ledger reports enable you to monitor trust accounts.

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Other Notable Features

Given the new trust accounting features, Kurent lets you know about trust balances when approving invoices. This is just one of many new features Tabs3 Software has added to the invoicing system. Chief among these is the ability to combine invoices, which gives clients a complete picture of all their activity for multiple matters.

Just as you can batch send trust requests, you can also batch send invoices for legal work, including reminders for unpaid invoices (you can also automate reminders). With Quick Add, you can add a new client and matter on the fly when entering a fee or cost. Your invoices will be on brand thanks to a choice of invoice templates and a myriad of customization settings.

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Kurent has added many new functions designed for the way many lawyers work. For example, you can add notes to matters and convert them into billable entries, create text shortcuts to speed up data entry, apply User Roles to limit access with a high degree of granularity, and create Quick View widgets that display data (e.g., matters with unbilled activity) and provide a menu of options for taking action. New reports provide deeper insight on user productivity and historical transaction activity.

What Else Should You Know?

Kurent now integrates with QuickBooks Online, including contacts, matters, payments, and refunds. You can migrate existing contacts, matters, accounts receivable, and unbilled fees to Kurent during setup. Kurent costs \$26 per user per month with an annual commitment (\$29 month to month), including unlimited support.



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