

# What's inside MetaRecords (MR)

MR handles your important business tasks, such as order processing and billing, in a flexible, interconnected environment that includes a complete set of professional-looking legal forms (with a built-in word processor), and a central repository, so you no longer have to keep hard copies of important information. Plus it handles order tracking, receivables, collections, payables and business tracking and forecasting, with a full range of reports from work load to cash flow to profitability.

MR comes with everything most records retrieval and process serving firms need to manage their business built in. It is a turn-key system, but customizable so you can tailor it to your business and the specific services you offer. And MR is HIPAA-compliant, with protections that include security access controls, required information fields and standardized forms.

MR8 is available by subscription with the convenience of automatic low monthly payments. You can add or subtract users as your needs change. You can also choose to either host MR8 on your own server in-house (with MR8 Subscribe), or subscribe to remotely-hosted MR8 Cloud, which eliminates the need for your own server, repository, back-up system, and IT staff.

## Modules in MR:

**Orders** – Set up cases, create work orders, print legal forms, request fee checks, call custodians and receive records. Store case documents in repository and allow clients access through MR Web. Import client requests from MR Web. Record and archive signed waivers. Update and cancel orders. Schedule pick-ups and notify runners. Print certified mail cards. Enter services to be billed. Monitor work orders as they proceed, then keep tabs on them in storage afterwards.

**Production** – Turn in work orders, fulfill client requests, and prepare orders for billing. Print shipping labels and track shipments. Archive all documents by case, firm, invoice or general filing. Grant clients access to files and invoices online through MR Web. Generate labels, envelopes and form letters.

**Billing** – Finalize, print and post invoices, including COD invoices. Export invoices for e-billing (LEDES format).

**Inquiry** – Instantly locate information about orders, invoices, clients, payments and records. Analyze aspects of your business, such as clients' billing activity. Run month-, quarter- and year-to-date totals. Research who are your best clients and who has stopped calling so you can improve your

marketing efforts. Keep track of important client dates, such as birthdays and anniversaries.

**Receivables** – Credit and track client payments, including multi-invoice payments, discounts and overpayments. Assess finance charges, print daily and monthly reports, and monitor collection efforts. Apply retainers.

**Payables** – Pay custodian fees via credit card or check. Print or export fee checks to *Excel* and generate reports. Audit and reconcile fee checks. Monitor commissions and sales taxes.

**Setup** – Set up and maintain information about your company, service items, billing rates, records locations, and clients. Create custom invoice headers and messages. Enter your workflow steps for tracking orders. Create multiple scopes for different record types. Group forms into packages to speed order processing.

**Reports** – Analyze your business's productivity, profitability and other relevant data. Export reports in a variety of popular formats, including *Word* and *Excel*.

**Tools** – Set company-wide options for your MR8. Customize drop-down menus. Set up users and group them according to their system access levels and job functions. Create forms and letters. Maintain and back up your MR database. Perform custom searches of your MR database, including notes logs. Search for notes entered system wide.

## Optional plug-ins

**MR Web** – Give clients access to their information with secure online offices, where they can request records and see their current order status online, download files and invoices over the Internet.

**MR Reward Points** – Track your best customers based on the business generated by individuals' calls to you, instead of by firm billings. Then reward these contacts using a points system similar to an airline or credit card reward plan. Add the **Reward Points for Web** plug-in so they can keep track of and redeem their points online.

For more information on MR plug-ins, visit our website.

## Turn-key system for records retrieval firms & process servers

MR comes with built-in defaults so you don't have to start from scratch defining common items. MR's built-in defaults incorporate business logic and best practices for records retrieval firms derived from our 30 years of developing soft-

## What's inside MR8 – continued

ware for this industry. You can add to, delete from, or edit defaults, such as services offered, to customize MR8 to your unique business needs.

Plus, we can import your existing firm, contact and location information if you provide the files in Microsoft *Excel* or ASCII format.

### A system that grows to fit any size office

The basic MR system includes the MR8 server software and database, client software for workstations and laptops to access the MR server, and Client Access Licenses (CALs). CALs allow users to access your MR server with the client software. You need as many CALs as you will have users accessing the MR server at a time. Additional CALs can be added at any time to handle your firm's growth.

#### Basic MR office management package includes:

- **MR Server**, which installs on the server (or main computer, depending on system size). The MR Server contains your MR database of clients, cases, work orders, locations, etc.<sup>1</sup> (If you subscribe to MR8 Cloud, we install and maintain your MR Server on the Microsoft Azure's Cloud Services.)
- **MR Client**, which installs on a workstation and accesses your database on the MR Server.<sup>2</sup>
- **Annual software maintenance & support contract**, either Standard or Premium.<sup>3</sup>
- If you subscribe to MR8 Cloud: **Repository storage and data mirroring**,<sup>4</sup> eliminating the need for your own in-house or third-party repository solution, or a back-up system.

MR software maintenance and support contracts are required to ensure that you have the latest updated software and help when you need it. Choose the plan that's right for your business.

Standard includes unlimited support via phone, fax, email, live chat, website and remote during our regular business hours, plus automatic updates & upgrades of MR8 and other valuable services. It is included free with your subscription.

Premium adds peace-of-mind and convenience services, such as extended service hours, priority call-back, and more.

For more information about MR support plans, visit our website.

#### Add online offices to your MetaRecords suite

To get the most benefits from MR, add MR Web online offices, which give your clients online access to their order status, plus case repositories, downloadable invoices, and a smart order request form.

Adding MR Web puts your MR office on the web and automates your routine interactions with clients, so you can concentrate on the most profitable aspects of your business while giving clients top-level service, including online status reports in real time and online repositories for case files.

For more information on MR Web, visit our website.

### Subscribe to MR

MR is available by subscription in two versions: in-house MR8 Subscribe or hosted MR8 Cloud. For as little as \$150/month, you get a full office management system. For more information about subscribing to MR, visit our website.

MR is backed by an unconditional, 30-day, money-back guarantee, so you can try it risk-free.

1. *Each server/main computer requires a separate MR Server license.*
2. *Each workstation that accesses the MR Server simultaneously requires a separate user license (CAL). Additional user licenses can be added or subtracted on a monthly basis for an additional fee.*
3. *Each MR Server license includes Standard support in your monthly fee. You can upgrade to Premium support for an additional monthly fee.*
4. *MR8 Cloud uses Microsoft Azure's AlwaysOn Availability Groups which duplicate data on multiple servers in real time. If the active server goes down, another server takes over with no loss of data.*



For more information about MR8 and MR plug-ins, please contact MR Sales:

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