



**METARECORDS**

Business management software for records retrieval companies & process servers

## **MR8 Cloud**

*Run your business more efficiently with lower overhead & better security*

OMTI's latest version of MetaRecords simplifies your business practices while adding security and reducing costs.

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**Business management software for records retrieval companies & process servers**

## **What is MetaRecords?**

MetaRecords (MR8) is a software application that handles the unique business tasks and processes of retrieving medical/legal records and serving legal documents. It is a turn-key system, including functions for all of your important business tasks; but it is also customizable, so you can tailor it to your business and the specific services you offer. MR8 is HIPAA compliant, with protections that include security access controls, required information fields and standardized forms.

## **What is MR8 Cloud?**

MR8 Cloud is the same MR8 system our clients have used for years for their work orders, billing, production, collections, and more. Instead of hosting it in-house at your office, it's on Microsoft Azure's Cloud Services. This network of remote servers stores, manages, and processes MR data in an environment that is always up and always on — no more worries about server crashes. In fact, Microsoft guarantees 99.95% uptime.\*

## **Why MetaRecords?**

If you are a records retrieval business or process server, you are always looking for ways to save money. Increasing efficiency is key, and MetaRecords will make processing orders, billing clients, and managing payments more efficient so you can do more in less time. It also comes with a default set-up and a complete set of legal forms so you can be up and running quickly.

And by subscribing to remotely-hosted MR8 Cloud, you eliminate the need for your own server, repository, backup system, and IT staff, which saves on overhead.

## **MR8 saves your business time and money**

- MR8 functions are all connected, meaning that you enter information into the system once, and it flows wherever it's needed: no re-keying.
- MR8 includes a complete set of professional-looking legal forms and a built-in word processor, so you can customize or create your own forms.
- It includes a central repository, so you no longer have to keep hard copies of important information; and if you add MR Web, your clients can access their orders and case files online, even pay for them online (meaning fewer deadbeat clients).
- MR8 is subscription-based. Subscriptions are monthly: You can add or subtract users as your needs change or cancel anytime without penalty. No long-term contracts or large up-front payments.

## **MR8 Cloud can save you even more**

- No server hardware or software to purchase or maintain
- No need for IT support
- MR8 upgrades are included in monthly subscription
- No need for in-house backup equipment and procedures
- Better security than you have now is included
- Zero downtime means better productivity

\* [https://azure.microsoft.com/en-us/support/legal/sla/cloud-services/v1\\_2/](https://azure.microsoft.com/en-us/support/legal/sla/cloud-services/v1_2/)

## What's included in MR8 Cloud?

### The basic MR8 office management system includes:

- **MR8 Server**, software program which contains your database of clients, orders, and locations (e.g., places from which you retrieve records).
- **MR8 Client**, software that accesses MR8 Server from a desktop or laptop PC via the Internet. You can install multiple instances of MR8 client software on different PCs.
- **One client software user license** (called CAL, Client Access License), which allows a single user to access MR8 Server from any PC that has MR8 Client installed. If you will have more than one person at a time using MR8, then you need to obtain additional CALs. You can add or subtract CALs each month as needed.
- **Standard support**, including set-up & basics training, plus phone/email/live chat/remote support. You can upgrade to Premium support. Full support details can be found on our [website](#).
- **Product updates and upgrades**, so you always have the latest version of MR8.

### In addition, MR8 Cloud includes:

- **Server hardware and software** that houses your MR8 Server in the cloud.
- **Better-than-backup solution** so you experience zero downtime and no lost data in the event of server failure.
- **100GB of repository storage for case files** and other business files (additional storage available as needed).

### Quick set-up & lower investment costs with turn-key system

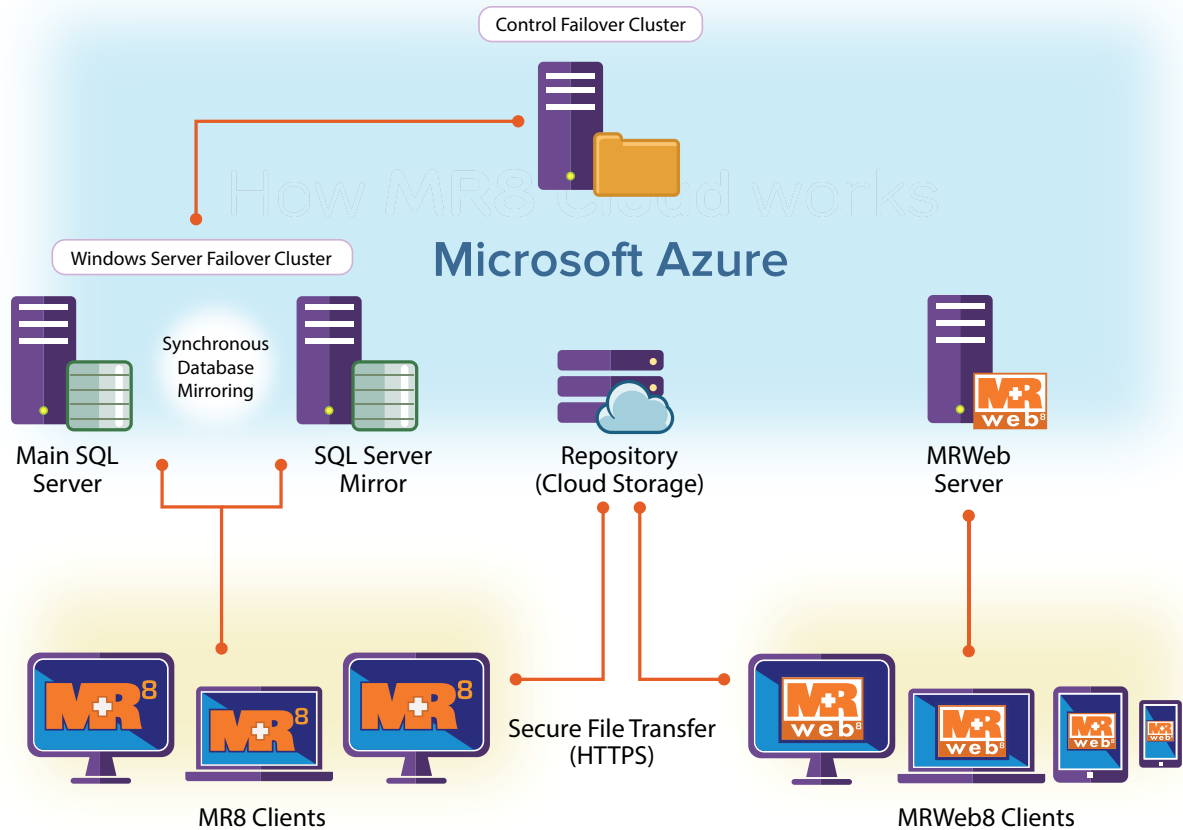
With MR8 Cloud, you can quickly set up a comprehensive business management system without large cash outlays for servers, additional software, or IT contracts. If your business is cyclical, or you will temporarily need more user licenses for a big case, you can ramp up with additional CALs when needed and not be stuck with extra capacity (and increased overhead) when you don't. Plus you can cancel the whole thing at anytime and not be stuck with expensive equipment, unneeded software or IT commitments.

MR8 comes with built-in defaults so you don't have to start from scratch defining common items. MR8's built-in defaults incorporate business logic and best practices for records retrieval firms derived from our over 30 years of developing software for this industry. You can add to, delete from, or edit defaults, such as services offered, to customize MR8 to your unique business needs.

If desired, we can import your existing firm, contact and location information from files you provide in Microsoft Excel or ASCII format.



## How MR8 Cloud works



### Failover cluster protection

MR8 Cloud is set up in Microsoft Azure's Cloud Services in what is called a failover cluster. A failover cluster is a connected group of servers (called nodes) in which if one of the cluster nodes fails, another one takes over, so the user experiences a minimum of disruption in service.

MR8 Cloud is protected by Microsoft SQL Server's AlwaysOn Availability Groups, which means your MR8 SQL Server is duplicated on multiple other servers in real time. In the event that one server goes down, another takes over with no loss of data.

### Repository included

All files in your repository are stored in the cloud with your MR data with the same security and reliability. Storage capacity increases as needed, automatically.

### Best MR Web set-up

If you offer clients MR Web online offices, they will notice that webpages load faster and repository files download faster from MR Web than if your MR8 Server were inhouse because your MR Web will be on the same network as your MR8 Cloud.

Setting up MR Web will be easy: Configuring ports or switching IP addresses is not necessary if you have MR8 Cloud. This also makes MR Web more secure than if it was on a separate network. (*MR Web is an optional plug-in.*)

### Simple in-house requirements

The bottom of the diagram depicts your set-up. All you need to use MR8 Cloud is your laptop and/or desktop computer. You can connect from anywhere with an Internet connection. You can see all of the servers and network configurations will be handled in the Microsoft Azure Cloud, managed by OMTI.

## Benefits of MR8 Cloud

MR8 Cloud is the practical solution to the technical problems of running a records retrieval business, especially if your interest lies in records retrieval, process serving, or people management — or anywhere else but the nitty-gritty responsibilities of the technical side of things.

### Never buy a server

In-house servers should be replaced every 3–5 years, because most in-house servers start to lose their ability to adapt to increasing workloads after four years.<sup>1</sup> Plus in-house systems need up-to-date SQL Server software and other required third-party software, which means regular software upgrade purchases. But with MR8 Cloud, the MR Server resides on Microsoft Azure's cloud platform, so you don't have to buy your own server. All of these expenses — including the IT expense involved in this major project — are eliminated.

### Reduce overhead costs

Eliminating server hardware and software purchases is only the beginning of cost savings. Using MR8 Cloud instead of an in-house system saves a company money in three areas over time:

- **Direct costs**, such as on-going expenses for electricity to power the server, HVAC to maintain the proper environment in the server room, even the server room itself or other dedicated spaces, such as for the company's file repository.
- **Indirect costs**, such as IT staff to maintain all of that third-party hardware, troubleshooting its problems, fixing software bugs and coordinating with OMTI Support.
- **Hidden costs**, such as low productivity due to server downtime or remote connection problems.

Not only does a company save on overhead by using MR8 Cloud, they also get a better system than they could most likely afford on their own. To duplicate our set-up of two secure machines, each running their own copy of SQL Server 2014 Enterprise Edition, plus MR8 Cloud would cost over \$80,000/year.<sup>2</sup>

### Next version of MR is included

What happens with other office management software that you've purchased when an upgrade comes out? You have to buy the upgrade. But with MR8 Cloud, instead of having to come up with a large lump sum at once to upgrade, the next version is included in your monthly subscription.

### Eliminate backup errors

No matter what backup solution you use for your records retrieval or process serving business, it cannot be better than Microsoft Azure's AlwaysOn Availability Groups.<sup>3</sup> In fact, we have many horror stories of clients losing important order, case, and client data because their backup system failed. MR8 Cloud can save your business with its better-than-backup solution.

You don't have to deal with backing up data or repository files with MR8 Cloud. Instead, data is duplicated on multiple servers in real time. If the active server should go down, another server takes over with no loss of data. This is better than a backup system which only saves data up to a certain time, so anything entered since the last backup is lost. Azure's AlwaysOn Availability also eliminates the downtime involved in restoring data from the backup.

Repository files are equally secure. Copies of each file are stored on servers in different locations. Azure Geo-Redundant Storage replicates each file three times in one region, then replicates it again three times in a secondary region hundreds of miles away. For example, if a company's files are stored in the western United States, they are also duplicated to servers in the eastern U.S.<sup>4</sup>

### Better security

Which do you think can protect data better? An individual records retrieval company, or a multinational technology company that has dedicated substantial resources and made a public commitment to guarantee the security and privacy of data on its cloud services?

MR8 Cloud is on Microsoft Azure's Cloud Services, which offers us enterprise-grade SLAs on services, 24/7 tech support, and round-the-clock service health monitoring. Microsoft knows that many companies are wary of working from the cloud, so they are a leader in cloud security and data privacy. They were the first cloud provider recognized

by the European Union's data protection authorities for their commitment to EU privacy laws, and the first major cloud provider to adopt the new international cloud privacy standard, ISO 27018.<sup>7</sup> Maybe that is why more than 66% of Fortune 500 companies rely on Azure, including 3M, GE Healthcare, Mazda, McKesson, and NBC Sports.

Microsoft's superior commitment to security makes MR8 Cloud more secure than an in-house system in many ways. One way is open port security: If a company's staff log in remotely without a secure connection, the company does not need to keep the well-known default SQL port open; nor do they need to keep any custom ports open for MR Repository downloads.

## **Same MR system**

Existing MR users don't have to worry about a learning curve with MR8 Cloud, or missing features. MR8 Cloud is the same program as the in-house MR8. And standard support is included in MR8 Cloud.

## **Easy updates**

Companies using MR8 Cloud don't have to worry about MR8 system updates because the version in the cloud is always the latest. Companies only need to install automatic workstation updates, which is done through a simple wizard on each user's desktop PC or laptop.

## **Less downtime**

Server crashes are a serious cause of downtime, which translates to lost productivity and possibly lost business. Because when your site is down, your data is unavailable. MR8 Cloud removes that threat by putting MR8 Server on Azure's Cloud Services. Microsoft guarantees 99.95% uptime on Azure, which works out to at most 44 minutes of downtime/month.<sup>8</sup>

Another downtime cause can be network connection problems. If an agency's network connections are not stable, their remote users might encounter problems logging into MR8. MR8 Cloud solves this problem because it's just an internet connection, not a connection to an in-house network.

On top of server and network issues, waiting for a technician to help deal with any of this can translate into significant downtime before IT shows up and resolves things. With MR8 Cloud, there's no server to maintain, so there's no wait for a tech anymore.

## **Minimal financial commitment**

The commitment to use MR8 Cloud is minimal: There is no long-term contract, only a monthly subscription that you can add or subtract user licenses from at any time — or cancel at any time with no on-going financial obligation. The same set-up applies to the included file repository: the first 100GB of storage are included in the monthly subscription, and users can add or subtract storage capacity as needed.

## **Footnotes**

1. <http://www.sherweb.com/blog/total-cost-of-ownership-of-servers-iaas-vs-on-premise/>
2. <https://blog.serverdensity.com/cloud-pricing-vs-dedicated-pricing-cheaper/> and <https://www.directdeals.com/Microsoft-SQL-Server-2014-Enterprise---4-Core-License---Unlimited-Clients--OLP/SA/7JQ-00255-144CS.htm>
3. <http://fortune.com/2015/09/29/rackspace-manage-your-security/>
4. <https://www.omti.com/mr/products/pricing-guide.html>
5. <https://msdn.microsoft.com/en-us/library/hh510230.aspx>
6. <https://docs.microsoft.com/en-us/azure/storage/storage-redundancy#geo-redundant-storage>
7. <https://azure.microsoft.com/en-us/case-studies/>
8. [https://azure.microsoft.com/en-us/support/legal/sla/cloud-services/v1\\_2/](https://azure.microsoft.com/en-us/support/legal/sla/cloud-services/v1_2/)

## In-depth look

### Top 10 reasons to use MR8

MR8's integrated system means you can do more and spend less on company overhead. You will need fewer applications, fewer workstations, and fewer work-arounds while following best practices for your industry.

#### 1. Streamline your office with cloud-based version.

- Eliminate the hassles of maintaining your own server or repository storage with MR8 Cloud.
- No worries about server crashes, lost data or forgotten backups.

#### 2. Go paperless with MR8's central repository.

- Store all files related to a case, order, service item, firm or invoice for quick retrieval.
- Give controlled online access to clients to view and download documents.\*

#### 3. Save money with MR8's built-in word processor.

- No need for *Word* on everyone's work station to manage forms, letters & other documents that use MR data.
- Includes mail merge.
- Comes with a complete set of legal forms, including Affidavits, Notices of Delivery, and Custodian letters. Use them as is or edit to fit your business.

#### 4. Speed up document printing with form packaging.

- Create groups of forms (packages) to print, instead of printing individual forms.
- Create as many packages as you need.
- Each package can include an unlimited number of forms selected from any category.
- A package can be emailed as a single PDF file with all of the included forms bookmarked for easy navigation.
- Match interrogatories to packages on the fly.
- Attach scopes automatically to relevant documents within packages.
- For more production time-savers, visit our [website](#).

#### 5. Reduce entry errors with MR8's location database.

- Select locations your field agents visit regularly from a database instead of re-keying location information each time.
- Zip code database automatically populates city, state & country fields.
- Assign default expeditors for specific locations.
- Your expeditors can sort and group daily call lists by who handles the release of information (ROI) for a location, in addition to the location's name.
- Keep track of the facilities doctors are/were affiliated with.
- If a client provides an inaccurate location name and you replace with a more accurate name, Order Confirmations list both names so the client doesn't get confused.

#### 6. Increase efficiency with MR8's all-in-one Task Manager.

- This might be the only function you need to do your work on a daily basis. In one screen, you can:
  - Bring up a list of work orders (e.g., call list) using more than 20 different search conditions.
  - Change the tracking step of an order.
  - Request fee checks.
  - Assign runners (field agents) and notify them.
  - Receive records.



- Make calls and log them.
- Enter billable services.
- Write part and status notes.
- Print forms and packages.
- Go to the Turn-in screen (to start billing).
- Visit our [website](#) for more order-processing efficiencies.

## **7. Maintain business health & integrity with MR8's best business practices.**

- With MR8, your financial reports can meet SOX document-compliance requirements, assure your officers, investors and clients of your business's financial health and integrity.
- When an attorney sends you a deposit for an upcoming case, keep track of it as a retainer from the firm. When you later generate an invoice to that firm, MR8 alerts you to the retainer. Process each invoice against the retainer, until the retainer is used up or the case ends.
- At the end of a case, any retainer amount left over is refunded to the client.
- Instead of posting COD invoices, MR8 tracks them separately until paid or cancelled. You can view an aged list of all outstanding CODs and delete all CODs more than a certain number of days old.
- Make your collection effort more efficient and productive with MR8's collection tools, including reports, automatic letters, follow-up alerts, collections note log, and the ability to call up and email copies of disputed or unpaid bills from the central repository.
- Un-editable log-style notes can be cancelled, but not edited or deleted, so you maintain a complete audit trail.
- MR8 is HIPAA compliant.
- Automatic alerts for client-crucial information, such as outstanding retainers or collection reminders, display onscreen when received and also appear in the recipient's Message Center.

## **8. Provide better client service with MR8's CRM capabilities.**

- Maintain rich account profiles and prioritize accounts (firms).
- Enter standing service requests and preferences for each contact, which will appear as defaults for their new requests and when processing work orders.
- Each contact can have an unlimited number of assistants and seniors (for example, lead attorneys or paralegals — anyone who oversees a case). Assistants appear in the Ordered By field for new requests. Seniors can be granted online access to all activities associated with the contact.\*
- You can keep track of the custodian fee limit, if applicable, for each attorney.
- Link multi-branch firms together under their parent firm. Then search for business activities across all branches at the parent level, in addition to the individual office level.
- Visit our [website](#) for more client servicing capabilities.

## **9. Give clients online access to documents/invoices/orders with MR Web.\***

- Store all case-related files in MR8's repository, so clients can quickly access them online by case name and/or other search criteria. Win new clients by offering them an online case repository during the pre-discovery period.
- Clients can request or revise records directly from their online calendar, making it easy for them to order from you. And they don't have to key in a lot of information: They can copy an existing order and update it, mostly by selecting items in drop-down menus or clicking checkboxes.
- When ordering records online, clients select services from lists you create, which translates into quicker ordering with no inconsistent service descriptions or misspellings.
- When a client sends in an order online, it's immediately listed in their online calendar as a pending request.
- Online invoices include payment history and a downloadable/printable PDF version, so you don't have to email clients a copy of a lost invoice. They can get it quicker themselves from their online office.
- Users can access your MR Web through *Chrome*, *Edge*, *Internet Explorer* or *Firefox* on Windows and *Chrome*, *Firefox* or *Safari* on Mac.

## **I0. Market your services with MR8 plug-ins.**

- **MR Web 8 online office plug-in:**

- Win new clients by offering them an online case repository, often a requirement for most large cases.
- Add MR Web's log-in fields to your company website so every time clients sign into your MR Web, you get a chance to communicate with them.
- Update your MR Web content whenever you wish: Advertise new services, announce important events, etc. Customize contents of automated emails clients receive from your MR Web.
- Customize MR Web to match your company website's colors.
- Build client loyalty with easy online ordering, which makes it likely they will order from you again.
- Service lists in online order forms market your services because clients see a full and accurate listing of all of your services whenever they order records.

- **MR8 Reward Points plug-in:**

- Works like airline mileage programs or credit card reward systems.
- You determine which clients earn points, how many points to award per dollar billed, and which service items earn points.
- Allow clients to monitor their points online & make requests to redeem or transfer points online.\*\*

*\*requires MR Web plug-in*

*\*\*requires MR Web & Reward Points for Web plug-ins*

## **What is MR Web?**

MR Web 8 is a plug-in to MR8 that gives clients and third parties secure online access to your office. It is often the reason companies choose MR8 for managing their business. MR Web gives you online case repositories, e-commerce, and easy online records ordering. In fact, offering MR Web is sometimes a requirement before a client will sign a contract with a records retrieval company.

This is because having online access to records and order status saves your clients time and money. It also benefits your bottomline, by automating many interactions between your company and your MR Web users. Information in MR Web comes directly from your MR8, so it is always up to date and accurate. And information your users enter or upload to MR Web automatically flows to your MR8.

MR Web is easy for your clients and third parties to use. For example, after a user signs in, open orders that require attention appear along with their status and what needs to be done. The user can send the case coordinator a quick message with instructions on how to proceed with the order.

Users can access all of their files by case and easily track which files they have downloaded and viewed. C.O.D. clients can use MR Web too: Before they can access a file, they are prompted to pay for it via the included e-commerce function. Clients can see at a glance which invoices they have paid and what is still owed, plus review the details of any invoice. Clients pay the current balance (including any finance charges and late fees) of a single invoice or multiple invoices (even C.O.D. invoices) in a single transaction.

If users want to request records, they can save time and typing errors by updating a previous request instead of starting from scratch. The order form includes other conveniences: Required fields are clearly labeled; other fields can be left blank; users can attach files to submit with their request (for example, a list of parties on a case); they can look up facilities they want records from in your database, instead of typing them in; and if they don't finish a request, the program saves their information, so they can complete it later. Once they submit an order, they receive an automatic email instantly confirming that their order was received. And if they discover more facilities to get records from after submitting the order, they can easily add new locations, as well as additional files or attorneys.

You can customize MR Web to match your company's branding, including its colors, logo, and content about your company. You can also customize the content of automatic emails sent from your MR Web. And add periodic user password reset options for additional security.



## Under the hood

Functions in MR8 Cloud are grouped together into nine interconnected modules. For example, order processing functions are grouped in the Orders module, so staff that create orders, schedule pickups, notify runners and receive records can handle all of their work in that module. Relevant information from orders automatically flows to the other modules where needed, so for example, your billing staff does not have to re-enter information about an order to produce invoices.

### MR8 functions by module

#### Orders

- Set up cases
- Create work orders
- Print legal forms
- Request fee checks
- Call custodians
- 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
- Print shipping labels
- Track order locations via FedEx or UPS
- Prepare orders for billing
- 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
- Manage COD invoices
- Export invoices for e-billing in 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

## **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
- Perform custom searches of your MR database, including notes logs
- Search for notes entered system wide

## **Extend your MR system with plug-ins**

### **MR Web**

Secure online offices for clients and third parties, where they can:

- Request records
- Add new locations and attorneys to existing record requests
- Check current order status
- Communicate online with your office about orders that require their attention
- Upload and download files
- View and pay invoices online, including COD invoices

### **MR Reward Points**

- Track your best customers based on the business generated by individuals' calls to you, instead of by firm billings.
- Reward these contacts using a points system similar to an airline or credit card reward plan.

### **Reward Points for Web**

- Add this MR Web plug-in to the MR Reward Points plug-in so your clients can keep track of and redeem their points online.

### **Order Progress Access Extension**

- Add this extension to MR Web to allow others (such as co-counselors) to view online the progress of an order.

### **MR8 Cloud Data Reader**

- Gives you the ability to connect to your MR data in the cloud from third-party applications.
- Create your own custom reports using your MR data.
- For MR8 Cloud only.

## Business reports included in MR8

MR8 includes a wide variety of preset reports designed to give you quick and easy access to your company's information from collection forecasts to sales commissions.

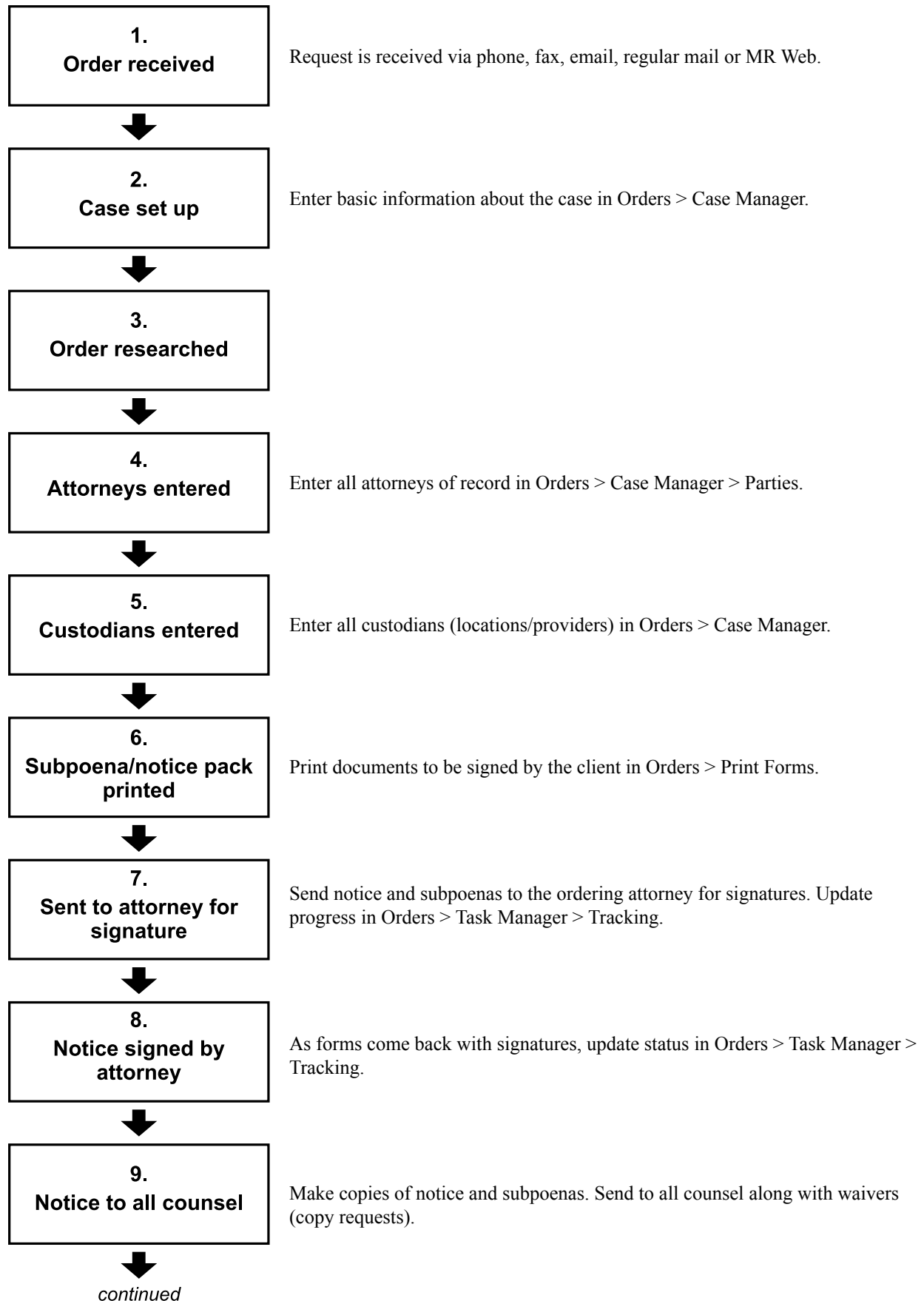
Built-in Report	Description
<b>Collection-related reports</b>	
Statements	Summarizes each client's overdue invoices. Each attorney receives a separate statement unless the firm has been set up to consolidate.
Aged A/R	Summarizes each client's unpaid invoices, grouped by when the invoice was due (aging period). This report can be sorted either by name or amount.
Open Invoices	Reprints all unpaid invoices to accompany statements. Invoices show payments, credits, finance charges and current balance.
Collection Forecast	Projects changes in your cash flow based on the promised payment dates (and amounts) of outstanding invoices.
<b>Financial reports</b>	
Monthly Journals	A summary recap of daily registers. Your accountant uses this report to prepare your company's financials.
Invoices	Lists all invoices generated for the specified period. This report can be sorted by invoice number, order number or firm name.
Paid Invoices	Lists all invoices paid within the specified period, grouped and sorted by the payment date.
Voided Invoices	Lists all invoices voided within the specified period, grouped and sorted by the void date.
Insurance Billing	Lists all invoices billed directly to an insurance company (or other third party), grouped and subtotaled by client and insurance company.
Miscellaneous Sales	Summarizes each invoice (containing the specified service items), grouped and subtotaled by client.
Business Analysis	Provides an instant snapshot of your business, with the sales amount and units shown for different periods for comparison.
<b>Client-related reports</b>	
Client Account Activity	Lists all activities for the month plus all unpaid invoices for each client. Activities include invoices, payments, duplicate payments, refunds, credit memos, debit memos, voids and write-offs.
Client Rating	Shows all invoices (starting with O&1), grouped and subtotaled by client. Sorting this report by amount can generate a holiday gift list.
<b>Staff-related reports</b>	
Sales Commission	Lists all invoices that include a commission, grouped and subtotaled by sales rep (account executive). Commissions are automatically generated from invoices on orders initiated by a sales rep's client.
Processor Production	Lists all invoices generated for the specified period, grouped and subtotaled by processor or client rep.
<b>Tax-related report</b>	
Sales Tax	Lists all invoices that include a sales tax amount, generated for the specified period.
<b>Fee Check-related reports</b>	
Check Reconciliation	Lists all the work orders that have not been billed yet, even though the custodian fees have been spent already. Also lists all the work orders that have been under billed or unpaid.
Bank Reconciliation	Lists all custodian fee checks cleared (or not cleared) for the specified period. You must perform the Import Check Reconciliation Data function before you can run this report.

## Customize MR8 further with custom reports

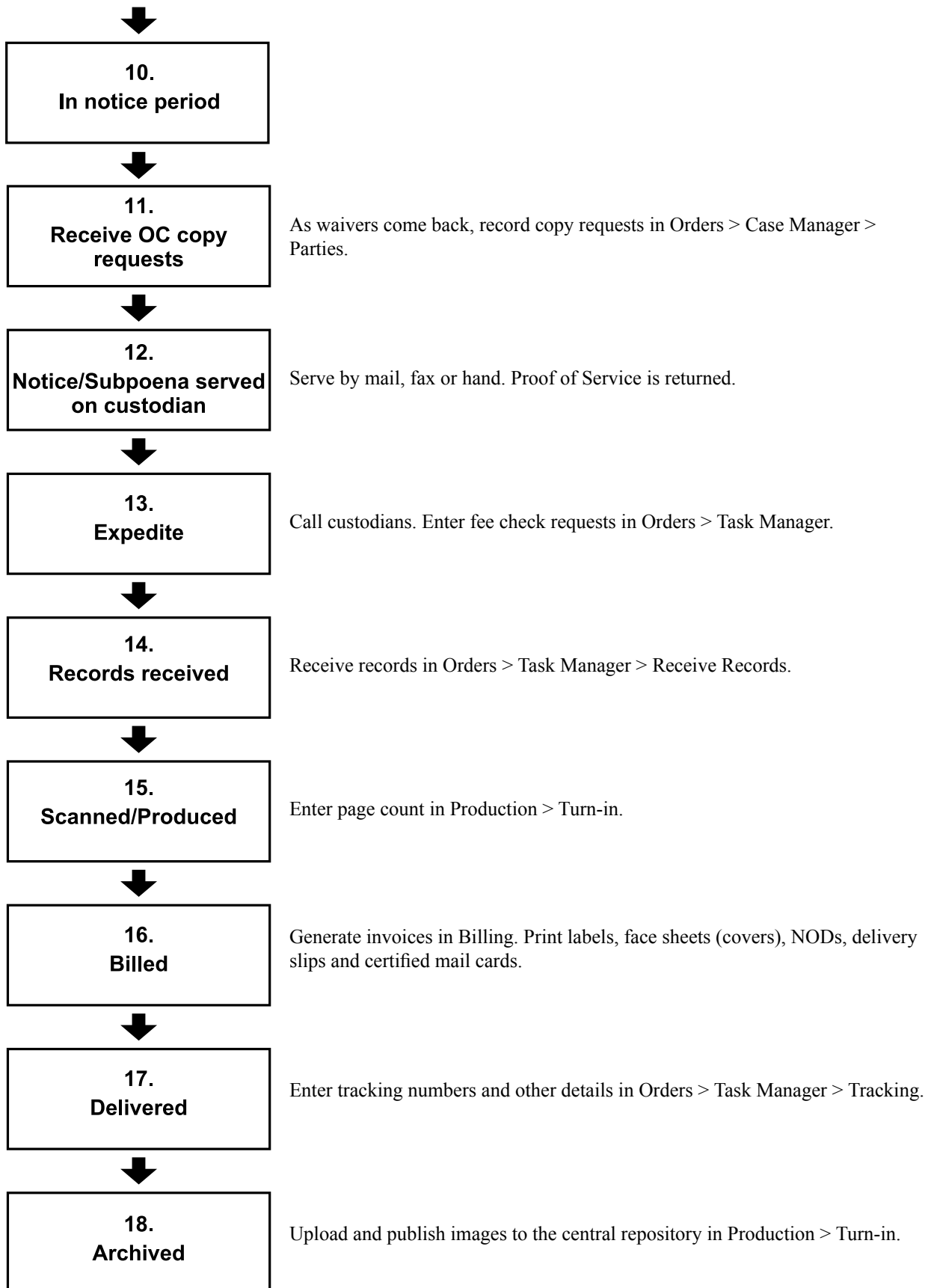
If you can't find the exact report you need in MR8, you can add the Data Reader plug-in to create your own reports, or we can program one for you. MR8 reports are written in *Crystal Reports 10*, the highly rated report building tool, which is what we also use for writing custom reports. View the Pricing Guide for cost details.

## How MR8 fits into your workflow

See how MetaRecords saves you time and money by automating your workflow:



*continued*



## MR Support Plans

You can choose between 2 plans for supporting and maintaining your MR office:

1. Standard — Included free in MR subscriptions.
2. Premium — Full-featured support plan includes a faster guaranteed response, more service options, and is required if you add custom programming to your MR system. Available for an additional monthly fee.

### Support plan services

	Standard	Premium
Initial product installation	\$250 + fee for optional data conversion	
Online support	O	O
Telephone, live chat, fax, email & remote support <sup>1</sup>	O	O
Scheduled call-backs	O	O
Guaranteed response	w/i 24 business hrs.	w/i 4 business hrs.
Update releases	O	O
Upgrade releases <sup>2</sup>	O	O
Extended service hours	X	fee-based
Custom programming	fee-based <sup>3</sup>	

O = included X = not included

1. Remote access requires a browser that allows ActiveX Controls to be installed by OMTI Support.
2. Upgrading to a new version of software is free, but an upgrade service fee of \$250 for converting data will be charged and payment due in full when invoiced.
3. Custom programming might require a Premium Support contract in addition to the programming fees. See service description for details.

## Service descriptions

### Initial product installation

OMTI Support does the initial installation during our regular office hours. We will consult with your staff and/or third-party technicians to coordinate your set-up with your work environment and schedule. You can perform your own workstation installations, but installation by OMTI Support is included in MR support plans.

### Online support

Users can find answers to their MetaRecords questions in several areas online:

1. **Customer Portal:** OMTI KnowledgeBase contains information on product releases and step-by-step solutions to common operational and software problems
2. **Team MR section of our website:** Training videos, FAQs, and downloadable user guides
3. **Idea Salad archives:** Step-by-step instructions, video tips, and more product information

### Telephone, live chat, fax, email & remote support

Our support staff is available during our regular office hours to provide support. If you can't find the answer you need in online support, call OMTI Support or connect with them via live chat on our website for a direct answer.

Sometimes, it's easier to solve a problem by accessing your computer remotely. In those cases, OMTI Support will ask you to turn on OMTI Remote so they can view and control your computer while talking you through the solution.

You can also communicate with OMTI Support via email: support@omti.com, or fax: 650-560-6550.

### Scheduled call-backs

You can make an appointment with OMTI Support for a time during support hours that is convenient to you for one of our support technicians to call you back to help resolve an MR issue or learn how to use MR better.



## **Guaranteed response**

If you call and leave a message, send an email or fax, OMTI's guaranteed response time is 24 hours for Standard support clients and 4 hours for Premium clients (Priority Call-Back), during our regular office hours.

## **Update releases**

Updates are versions of MetaRecords that add new features, fix bugs, and improve usability or performance. They are designated by the current version number and a serial decimal number (i.e., MetaRecords 8, version 8.7145).

## **Upgrade releases**

Upgrades are major releases of MetaRecords and are designated by a new version number (i.e., MetaRecords 9). Upgrades are included free in subscription software maintenance contracts, but an upgrade service fee of \$250 for converting data will be charged and payment due in full when invoiced.

## **Extended service hours**

For Premium clients who don't want to interrupt business during the day for certain support issues, OMTI Support is available by appointment after our regular business hours. OMTI extended service hours are 7–10 pm CT, M–F, and 12–8 pm CT, Saturdays, excluding holidays. Fee-based option in Premium support. Costs \$250 for the first hour, then \$125/hour after the first hour per appointment/resolution.

## **Custom programming**

If your business processes require something, such as a report or form, that is not in MR8, we can develop a customized solution for you. Costs a minimum of \$2,000. Requires an on-going payment of 20% annually of total billed amount for custom programming to maintain custom code. A Premium support contract is also required if custom reports will be used in a multi-database situation, or if the custom programming will alter MR8.

## **General support plan information**

As our clients' need change and new support technologies become available, we periodically revise existing plan benefits and add new ones. Always check our website for the latest benefits listing.

## **Service hours**

Most support services are only available during our regular office hours: 9 am–7pm CT, M–F, excluding holidays. Support information and news are available 24x7 on our website. Premium clients can schedule certain support services during our extended service hours for an additional fee.

## **Required plans**

All firms using MR software are required to be on a support plan. Standard support is included. Optional MR Premium support contracts are an additional monthly fee.

You can change plans at any time. If you upgrade to Premium support, changes in services do not occur until first monthly payment is received. To change your support plan, contact us.

## **Non-payment**

MR8 Cloud subscribers who fall into arrears will be unable to access their MR8 system until they pay any past due balances and set up automatic payments per our MR8 Cloud Service Agreement.

## **Support policies do not include:**

- Training, beyond initial one-to-one remote sessions covering set-up and basics, plus what is provided online
- Hardware or third-party software maintenance and support
- Support for your network or Internet access

## Pricing guide

MetaRecords offers MR office management systems and online services on a subscription basis. This following table is designed to help you decide what to rent for your business. We also offer free consulting to help you decide what will work best for your business and how to implement it.

MR8 Cloud is available by subscription only.

Subscriptions are paid by automatic credit card payments only.

### MetaRecords system & options cost

Whatever combination you choose, you get a 30-day money-back guarantee on MR8 and MR Web.

Product/Service	Price
<b>MR8 Cloud basic system</b>	\$250/month for one user, plus initial installation fee of \$250 and optional charge for data conversion <sup>1</sup>
<b>Additional user licenses<sup>2</sup></b>	\$60/month for each additional user
<b>Repository storage<sup>3</sup></b>	100GB included \$50/month to increase storage to 500GB, then \$50/month additionally for each additional 500GB
<b>Standard maintenance plan</b>	included
<b>Premium maintenance plan</b>	\$50/month
<b>Payment options</b>	automatic credit card payment only
<b>MR Web plug-in<sup>4</sup></b>	\$299/month per MR8 server license, plus initial installation fee of \$250
<b>MR Reward Points plug-in</b>	\$50/month
<b>Reward Points for Web plug-in<sup>5</sup></b>	\$50/month
<b>Order Progress Access Extension plug-in</b>	\$25/month
<b>Data Reader plug-in<sup>4</sup></b>	\$60/month per workstation (1–3 stations) or \$200/month per IP (no limit on # of workstations)
<b>Custom reports</b>	Base rate: \$2,000, plus 15% annual maintenance fee. Must be on Premium Support. Contact MR Sales for a quote.

1. For the initial installation fee, we set up MR8 in the cloud. [Check [System Requirements on our website](#) to see if you are ready for MR8.] Optional data conversion fee varies depending on how much data you want converted and what system you are converting from. Contact OMTI Sales for details.
2. You only need as many user licenses as the number of users who will be accessing your MR server (software and database) at the same time. Users accessing their online offices through MR Web are not included, nor do you need a user license for every workstation or laptop in your company. You can install MR8 on as many computers as you like, the MR server only counts how many are accessing it at a time. So, for example, if you install MR8 on your desktop computer and your laptop, but only use one or the other at a time, you only need one user license to cover both machines.
3. With MR8 Cloud, 100GB of cloud storage is included in the monthly system fee. You can add more storage as needed. For \$50/month, you can increase your MR8 cloud storage to 500GB. Additional storage is available above 500GB for an additional \$50/month per 500GB.
4. Download the [MR Web Product Overview PDF from our website](#) for information about MR Web and its optional plug-ins.
5. Requires MR Reward Points and MR Web plug-ins.



## Who is OMTI?

OMTI is a privately held company, founded in 1985, that develops business management software, web services and mobile apps for record retrieval companies, court reporting agencies, and other litigation support businesses. Hundred of legal support companies, mainly in the US and Canada, use OMTI's products and services on a daily basis. Clients of our ReporterBase and MetaRecords software range from national syndicates to one-person shops.

OMTI's products and services are available by subscription only. We know that our business management software is vitally important to our clients' businesses, so we must continue to support our clients and develop new products. Subscriptions provide OMTI with stable income and pay for all of our product development and support. All of our development costs are paid for by our clients. Desirable features like case repositories and e-commerce were made possible by our clients' subscriptions.

We continue to develop and implement new technologies that benefit this unique industry. For example, MR Web for your clients and third parties makes it easy for them to interact with your office online, including ordering records and paying invoices for access to transcripts and files (so even C.O.D. clients pay on time).

MR8 Cloud is the latest innovation from OMTI, simplifying records retrieval business management while saving on overhead and increasing data security. Cloud-based solutions are the next evolution of software, allowing us to quickly deploy new features and bug fixes to all of our clients. And by hosting our clients' systems on the best cloud services available, we can better ensure their systems' safety and integrity.

The success of OMTI's business model can be measured in both the continued significant growth in installed systems and add-on services, and the long-term loyalty of OMTI's customers — many have grown with the company since its beginnings, and companies that start using OMTI products overwhelmingly stay with OMTI products. OMTI values its customers, actively seeking their input on new solutions to their business problems and providing forums for information sharing and networking, such as our customer portal and user conferences.

OMTI is financially stable and has no debt. It is headquartered in the San Francisco Bay Area, with a Korean office for product development and an Oakland, California office which handles marketing. All of the principals in the organization have been with OMTI for more than ten years.

## Contact info

### Corporate headquarters

OMTI Inc.

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Burlingame, CA 94010

650-396-2105

fax: 650-560-6550

### Website with Live Chat

[www.omti.com](http://www.omti.com)

### Product inquiries direct line

650-396-2111

### Product inquiries email

[sales@omti.com](mailto:sales@omti.com)